Unified Communications
Microsoft® Office Communicator 2007 R2

About this Guide
This course is split into 4 modules which take around 10 minutes to complete.

The modules and a brief description are listed below.

Module 1. Getting Started
This module looks at how to start Office Communicator, set up your preferences and organise your contacts

Module 2. Communicating Effectively
Here you will be taken through how to make contact and set your status to ensure you receive communication in a way to suit you.

Module 3. Calls and Collaboration
This module will take you through the further features, such as sharing files, inviting others and starting a meeting.

Module 4. Further Information
Here you will find further information on how to get help and other related software and hardware guides as well as web access.
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Welcome to Microsoft® Office Communicator

Microsoft Office Communicator brings all your communication software and solutions together enabling you to go to one place to make a call, send an email, schedule a meeting or make a conference call.

Using **Presence Information** in Communicator shows you whether someone is available helping to ensure you reach the right person, in the right way, first time without checking in Outlook.

In summary, you can use Communicator to:

- Gain easy access to your Outlook contacts
- Organise your contacts into **Contact Groups** that suit you
- Participate in Instant Messaging
- Have group online discussions
- Decide on the most suitable communication method
Module 1 - Getting Started

Microsoft Office Communicator 2007 is managed by Information Systems for use by NTU Staff. Contact ITS Service Desk for information on gaining access to this software.

In this module you will explore:
How to sign in and out
Changing your start up options
The Office Communicator Interface
Managing Contacts

Starting Communicator

By default, Microsoft Office Communicator 2007 will automatically start and sign you in when you log on to your office PC.

You can open Office Communicator from your task bar.

**Double click on the Communicator icon.** (It may be a different colour dependant on your current presence status, see module 2.)

The Office Communicator window will now appear.

Closing or minimising the Office Communicator window will keep the software running in the background which you can then open at any time from your Task bar.
Changing your Start Up Settings.

You can stop Office Communicator from automatically starting up from the Options menu.

**Step 1:**
Click on the **Show Menu** button, Click **Tools** and then **Options**.

**Step 2:**
Click on **Personal** and then click to untick the check box next to Automatically start Communicator when I log on to Windows.

To launch Microsoft Office Communicator from your Start Menu:
**Start | All Programs | Microsoft Office Communicator 2007 RC**

**Signing In/ Signing Out**
If you sign out of Office Communicator you can choose to sign back in.

**Signing In**
If you sign out of Office Communicator you can choose to sign back in.

Check your email address is correct. Then either click **Sign In** or click on the drop down arrow next to **Sign in as: Available** and click on one of the following: Available, Busy, Do Not Disturb, Be Right Back or Away. (This is your presence which is covered in the next module).
To Sign Out:
Click on the Show Menu Button, Connect, Sign Out.

Using Office Communicator
Once you have signed into communicator you are presented with the Office Communicator Workspace.

1) Show Menu Button
From here you can sign out, change Access levels, add a contact, and set preferences.

2) Your Presence
This button indicates your current presence. You can click on this button to manually change your presence (see module 2).

3) Your Availability Status
As well as displaying your presence i.e. Busy, you will also display a reason/availability status to explain why (see 3). For example In a Meeting.

4) Search Text Box
Typing a name or email address into this text box will show all contacts from your contacts folder and NTU’s global address book which match your entry.

5) Contact Lists
This is a list of your recent contacts, and any contacts or distribution lists you have added and contact groups you have created.
Managing Contacts

Your contact list is a list of communicator contacts you communicate with most, for example, your team, project teams and other working groups you are part of. This is your starting point for communicating with your contacts. With a mouse click or two you can place a call, start a group discussion, start a conference or schedule a meeting.

When you first start using communicator, you need to build your contact list to suit your needs. You can add individuals, distribution lists, and create custom groups.

All NTU staff members are, by default, given the access level of Company. You can change the level of access for your contacts by changing the level of information they can see through communicator. For example Company access will show your office location from Outlook, but Team access will enable contacts to view a location you have set.

Please note: company level is equivalent to the information NTU email users can already view about you.

Contact Groups

Whether you are part of a project group, regularly contact members from an informal team or the same few members of staff regarding an aspect of your work, you can create a group to suit.

If a distribution list exists for these contacts you do not need to create a new group.

You can set up a group in two ways:

Option 1
Right click on a group name such as Other Contacts or Recent Contacts and then Click on Create New Group. Type the Name you wish to give the group.

Option 2
Click on Show Menu, Tools, Create New Group. Type the Name you wish to give the group.

Hint: To rename your group, right click on the Group Name and then click on Rename.
**Add a contact**
To search for a contact:

Step 1: Start typing their name into the search box.

All records from your personal contacts and the global address book that match will appear below in the results window.

Step 2:
Drag the contact to the correct contact group.

**Note:** You can look up and add distribution lists in the same way. Contacts can belong to more than one group.

**Access Levels**

You can change a contact's **Level of Access** from the search window or contact list.

**Step 1. Right click** on a contact's Name
**Step 2.** Click on **Change Level of Access.**
**Step 3.** Read and then click on the appropriate access level to choose it. Their current access level will have a dot to the left of it.
View Contacts Access Levels

You use **Access Levels** to control the level of your presence information that others see.

**Step 1: View contacts by Access Levels**
In the Communicator window, click the Change View button, and then click

**Step 2: Change Access Level**
You can drag and drop contacts to move them to another access level. To move more than one contact, hold down the **Ctrl** key and click on each contact you wish to move, and still holding **Ctrl** drag and drop your contacts into the correct access level.
Module 1 Quick Quiz
The answers are at the end of this guide:

**Question 1: True/False**

I can only add NTU Staff to my contact list
Fill in the circle of the correct answer:

- A) True
- B) False

**Question 2: True/False**

Contacts can belong to more than one contact group
Fill in the circle of the correct answer:

- A) True
- B) False

**Question 3: True/False**

I can block people from emailing me, using Access Levels
Fill in the circle of the correct answer:

- A) True
- B) False

**Question 4: Multiple Choice**

What's the easiest way to know which access level you want to assign to a contact?
Fill in the circle of the correct answer:

- A) Print out a list from help
- B) Memorise the access level details
- C) Read the descriptions on the menu
Module 1 Summary

Starting Up
By Default, Office Communicator will automatically start up when you log on to your NTU computer. Off-site access information can be found in Module 4.

To create a new contact group
Right click on Recent Contacts in your contact list. Then click on Create New Group. Type a name for your group and then press Enter.

To Add a Contact
Start typing their name into the search box. All records from your personal contacts and the global address book that match will appear below in the results window. Then drag the contact to the correct contact group.

Access Levels
By default all NTU staff have an access level of company. To see a description of each access level, right click on a contact and then hover your mouse over Change level of access.
Module 2 - Communicating Effectively

This module which takes around 10-15 minutes to complete will take you through how to:

- View contacts' availability
- Set your own Presence Level
- Change a contact's **Access Level**
- Receive and respond to Instant Messages
- Start an Instant Message
- Change the format of your Instant Message

**Presence**

Your presence level shows other users a snapshot of your availability. Communicator decides on your presence based on your availability in Outlook.

NTU staff can already see this information about you by right clicking on your email address in Outlook.

You can manually set your presence information giving you more control over what information others can see and enabling you to provide other staff members with more accurate information.

Screen shot from Outlook 2003 on a PC without Communicator installed (above left)

Screen shots from Microsoft Office Communicator (below)
Set your Presence

Your Presence shows other users quickly a snapshot of your availability. Your Presence is indicated by a coloured circle. Communicator automatically displays your current availability status, but you can manually set your status at any time.

To do this, click on the Presence button (the coloured circle next to your name), and then click on either Available, Busy, Do Not Disturb, Be Right Back or Away to set that as your current presence level.

<table>
<thead>
<tr>
<th>Presence Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>This contact is online and available and can participate in conversations. (Can be manually set)</td>
</tr>
<tr>
<td>Busy</td>
<td>This contact is available but engaged in another activity or has set their status to busy. Activities could be: On a call, in a conference, in a meeting.</td>
</tr>
<tr>
<td>Available but Away</td>
<td>Is available but probably not at their desk. Their computer has been inactive for 5 minutes.</td>
</tr>
<tr>
<td>Away or Be Right Back</td>
<td>Has manually set their status to away or be right back. Or has not used their PC for 15 minutes.</td>
</tr>
<tr>
<td>Busy and Away</td>
<td>Is busy and probably not at their desk. Their computer has been inactive for 5 minutes.</td>
</tr>
<tr>
<td>Do not Disturb</td>
<td>Has manually set their status to Do-not-Disturb</td>
</tr>
<tr>
<td>Presence Unknown</td>
<td>Does not have an NTU Communicator account</td>
</tr>
<tr>
<td>Offline</td>
<td>Not available and cannot be instant messaged. They have either not signed in or have blocked you.</td>
</tr>
</tbody>
</table>
How others contact you
You will be alerted if, someone has added you as a contact, you have been sent an instant message or someone calls you using Office Communicator.

Call alert

Message alert

Setting Your Location
To give contacts more information on how to contact you, you can change your location, and add a note to your information or give them access to an alternative contact number. You will need to change a contacts access level to Team or Personal to allow them to view your location.

Click on your presence button and then Current Location.

Then either click on Home or Do not Show Location,

or click on Create Custom Location... and then enter a name for your location and press Enter

Add a Note
To give contacts more information on how to contact you, you can change your location, and add a note to your information or give them access to an alternative contact number.
To enter a note.

Click on **Type a note** and type the information you wish to appear. Then press **Enter** on your keyboard.

If you have set an Out-of-Office in outlook, this will be added as your note for others to view in Communicator.

**Sharing your Mobile or Home**

**Alternative numbers**

To give contacts more information on how to contact you, you can add alternative numbers. You will need to change a contacts access level to **Team** or **Personal** to view your mobile number or **Personal** to view your home number.

**Edit and publish your phone numbers**

**Step 1:** In the Communicator Title bar, click the Show Menu button, point to Tools, and then click Options.

**Step 2:** The Office Communicator - Options window will appear. Click on Phones.

**Step 3:** Click the button for the number you want to add or edit.

**Step 4:** After you have entered the number click Ok. Check the Publish this phone number box is ticked for those numbers that you want to make visible to other Microsoft® Office Communicator users. Click **Ok** to return to the communicator screen.
Contacting 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 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 or check the contact card to determine when the person will be free for a conversation.

In this section, we will explore how to:
- Determine if a contact is available for a conversation.
- Find additional contact details, such as a schedule, to determine when a contact will be available.
- Tag a contact so you are notified when the contact becomes available.
- Send Instant Messages and format them.

Andrew Academic has a presence of Away and Status Away.

Contact Availability

Each contact has a presence and availability status shown. You will not see this information if they do not have an account (presence unknown).

If a contact has added a note the note icon is shown next to their phone icon.

If the note icon is purple, this is an Out-of-Office message from Outlook. Hovering your mouse cursor over the note icon will display the message.

If you urgently need to get hold of a contact. You can tag a contact to be alerted when the contact's status change to available or offline. Tagged contacts are indicated by a yellow star.

To Tag a contact:
Right Click on their name then click on Tag for Status Change Alerts.

An alert will show in the bottom right of your screen every time that contact’s status changes to available or offline.

Click on the menu items above to jump to a section
Click Next for information on how to view further availability information.
Contacting Others – Scheduling Information

If a contact’s status is not available for example, away or busy, 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 the default Company access level or higher. If you have been granted an access level of Team or Personal you will also be able to see their current location.

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 above, you can click the contact’s Presence button to view his or her schedule and determine when the contact will be available.

This is a contact card providing 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, as well as any personal note the contact has written and their location. The contact card also provides a launch 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.
Instant Messages
You can send an Instant Message to a contact as long as their presence status that is not Offline or Unknown.

To open the conversation window, double click on the contacts name, or right click on their name and then click Send an Instant Message.

Type a message into the text box at the bottom of the conversation window and then press Enter.

Your conversation will appear in the centre discussion area.

Formatting an Instant Message
With Communicator, you can change the font, font size, and colour, or format text with additional attributes such as bold, italic, or underlining.

To format instant message text for a single message

Click on the Change text color, font and other formatting button in the conversation window to view the formatting popup window and then select your formatting options.

Change Format for all Instant Messages

Step 1. In the Office Communicator Title bar or in a conversation window, click the Show Menu button and then Tools, Options.

Step 2. In the Options dialog box, click the General tab, and then click Change Font.

Step 3: In the Change Font dialog box, make the changes you want, and then click OK. Click OK again to accept the changes, and then close the Options dialog box.

Your font changes will now apply to all your instant messages.
Add Emoticons to your Instant Messages

Emoticons are graphic images that you can use in your instant messages to convey feelings and emotions.

To add an emoticon to an Instant Message

Step 1. In the Conversation window, in the message area, place the cursor where you want to insert the emoticon.

Step 2. Click the Emoticon button, and then select an emoticon.

Communicating with a Group of contacts

You can contact whole distribution lists or contact groups from Office Communicator.

Right click on the top level of the group, the group title. You can then choose whether you wish to:

Send an instant Message (start a group discussion)
Email all (use the group as a distribution list)
Invite all to a Live Meeting
Or schedule a meeting.
Missed Communications
If you have missed a Call (Communicator or IP Phone), an IM or Meeting Invite you will receive a notification in your email.

Open the missed call, Click on their telephone number. This opens the communicator conversation window.

From here you can decide how to respond to the missed communication.

You can click to call (if you have an IP telephone), click on the speech bubble to start an IM conversation, send them an email, or schedule a live meeting.

Quick Quiz

Question 1: Click on the correct place on the image below.
Where would you click to change your Presence Level to Busy?

Question 2: Multiple choice
What is the quickest way to start an Instant Message?

A) Click on Show Menu, then Connect
B) Double Click on a contact's name
C) Click on the contact's presence button

Module 2 - Communicating Effectively Summary

You should now be able to

View contacts' availability and basic scheduling information
Set your own Presence Level
Change a contact's Access Level
Receive and respond to Instant Messages
Start an Instant Message and Format your messages
Module 3 - Calls and Collaboration

Microsoft® Office Communicator gives you the flexibility to choose the right communication method when needed. Not only can you email and instant message your contacts you can also **call them directly from Communicator through your IP telephone**.

You can also escalate conversations into an **Online Meeting** (Microsoft® Office Live Meeting), **share files and your desktop** and **add voice and video** into your instant messages if you have a microphone, speaker or headphones and/or webcam.

By the end of this module you will be able to:

- Identify whether you can use click to call
- Make and control your calls using communicator
- Share a file and your desktop
- Invite others into your conversation
- **Call Using an IP Telephone**

**Making a Call from Communicator**

If you have **an IP telephone** you will be able to quickly turn a conversation into a call.

You can click to call people from Communicator whether they are your personal contacts or from the University's Global Address Book.

You can also call optional numbers by clicking the options arrow to the right of the Call button.
**Make a one-click phone call**
In the Contact List, click the contact’s Call button.

**Call an alternate phone number**
In the Contact List, hover over the Call button 📞 and then click the arrow to the right of the Call button, and then click the number you want to call.

**Enter a phone number to call**
Type the number in the Search box, and then click the Call button next to the number as it appears in the Search Results box. You can enter an internal phone extension, an external number, or a contact’s name.

**Invite another contact to join a call**
In the Conversation window, click the Invite button, and then select a contact, enter a name, or enter a number to call.

Click on the menu items above to jump to a section.
Call Controls (IP Telephone Users)

Call Controls in Microsoft® Office Communicator 2007 R2 enable you to easily manage your phone calls. For example, you can put a call on hold, transfer a call to another user or phone, or mute a speaker or microphone.

Transfer an incoming call to another person

Step 1: Click the call alert invitation to accept the call. In the Conversation window, click the Transfer button, click Transfer, then another person.

Step 2: This opens the Transfer Call window, locate and click on the contact you want to transfer the call to. Please note this creates a blind transfer and you are not able to announce the caller.

End a call

In the Conversation window, click the End Call button.

Put a call on hold

In the Conversation window, click the Hold button.

Note: You can still control your calls as usual using your IP Telephone.

User guides for IP telephones are available on the IS website.
Calls and Conferencing

From the conversation window you can then choose to attach a file, share video, call the contact, share your desktop, add instant messaging, invite others to the conversation, Share files using Microsoft Office Live Meeting or send Instant Messages.

Sending Files

Step 1:
In the Conversation window, click on the Send a file button.

Step 2:
The Send a File window will appear. Locate the file you wish to send. Then click on Open.
Share your Desktop

You can **share your desktop** and choose to **share control** with all participants in the conversation or to a particular participant.

This allows you to **work collaboratively** with other participants on a file, or others to gain access to your PC for support or demonstration purposes.

**Step 1:**

In the Conversation window, click on the share button. If you have more than one monitor choose which one you wish them to access otherwise click on Share Desktop.

**Step 2:**

To give control to other participants, click on the Share button, **Share Control with All Participants** as appropriate. To pass control to another person, click on In Control button at the top of your shared desktop, then choose the person you wish to give control to.

**Step 3:**

You can Stop sharing at any time by clicking on the x next to the In Control button.

Invite Others

You can add others into a conversation, by choosing to invite them to join.

**Step 1:**

In the Conversation window, click on the Invite icon, then click on Invite a contact.

**Step 2:**

This opens the Invite a Contact window. Click on the contact you wish to invite. If you wish to invite more than one contact, you can hold down the Ctrl key whilst clicking on each name.

**Step 3:**

Click on OK to return to the conversation window.
**Start a Meeting**

Choosing to **Share Information using Live Meeting**, will allow you to easily manage a meeting online, also allowing audio and video for all participants as they can **call into the meeting**, regardless of what phone they have.

**Step 1:** In the **Conversation** window, click on the **down arrow** next to the **Send a file** icon.

**Step 2:** Click on **Share Information using Live Meeting**. This will automatically open Live Meeting on your computer and send an invite in the conversation window to other participants.

**Step 3:** All participants can find information to call into the meeting by clicking on the **Meeting** Menu Item at the top of the Live Meeting Screen.

More information and learning materials for Live Meeting can be found on the IS website.

**Module 3 - Quick Quiz**

**Question 1 -**

Which button would you click on to invite another contact to join your conversation?

**Question 2: True/False**

To call a contact in Communicator 2007, you can either search for the contact in the Search box or type the phone number of the contact in the Search box and click the Call button.

- A) True
- B) False
**Module 3 - Summary**

You can call a contact by clicking on the Phone Icon to the right of their name.

You can control your call using your IP Telephone or using communicator. Closing the call window in communicator will ask you if you wish to end your call.

You can:
Send a file to a contact whilst you are using communicator to speak to or IM them.
Send an email to a whole group by right-clicking on the group title.
Share your desktop
Escalate to Live Meeting to work collaboratively
Module 4 - What's Next and Further Information

This module will explain:

How to access communicator off-site
Where to get further information
What other products are available
What is Live Meeting

Communicator Web Access (CWA)

Further Information

You can access Office Communicator off-site using Web Access.
Go to: https://cwa.ntu.ac.uk/

Sign in

Type in your domain\username for example ADS\DEP3SMITHB and your usual password and then click on Sign In.

Using communicator web access you can still:
Start or receive IM conversations.
Add and remove contacts or groups
Search for contacts in the NTU Global Address book
View telephone numbers and scheduling information on their contact card
Change your note
To add a contact:

To access Add a contact, create a new group or rename a group, click on Contacts at the top of the Communicator window.

To view a telephone number:

Right click on a contact and then click on properties Or click on a contact's presence in your contacts list to view their contact card.

Then click on the phone icon. Click on the menu items above to jump to a section

To search for a contact:

Type in part of their name or email address then press your Enter key on your keyboard to view the results.

Unified Communications

Modernising the way we communicate is key to improving our flexibility and our personal and organisational productivity. Unified Communications support this transformation by blending technologies to enable voice, messaging, video and collaboration tools to work in harmony and the tools will be available to all users.

Other Products include:
Microsoft® Office Live Meeting
Cisco Unified Video Advantage
Cisco IP Telephones
Cisco Unity Voicemail
IP Contact Centre

For more information on any of these products or plans for roll-out please visit the IS website.  [www.ntu.ac.uk/IS](http://www.ntu.ac.uk/IS)
Microsoft Office Live Meeting

From your desk, you can hold conference phone calls and collaborate with people on or off campus.

You can do this between computers, between phones, over the web and, if you have access to a web cam, with video.

If you have access to a phone and a networked PC, you will be able to set up conference calls with the added benefit of seeing and sharing workspace, with shared online whiteboards, and you'll be able to share and work on files collaboratively.

If you have access to a network computer with a headset or speakers and a microphone, you can forget about the phone and just have the conversation via the computer, saves your phone bill, and if you would be having a conversation with someone from overseas, no international call rates to pay for, you can still share the collaborative online workspace.

If you and your participants have access to a web cam, you'll be able to see each other too!

Interactive course
To learn more about using Microsoft Office Live Meeting 2007 you can take this interactive course. The information from this course is also available as a downloadable document.

IP Telephones
More than half of the University’s telephones are now IP. The new IP phone system will offer more functionality for modern unified communications including new services and telephone handsets. The new handsets have many functions that enable swifter and more efficient ways of keeping in touch including:

• Conference calling
• Call transfers
• Call forwarding
• Caller ID
• Directories

To find out how to use your IP Telephone or when you will received your new phone, visit: http://www.ntu.ac.uk/information_systems/services/communication_services/telephones/index.html
Course Summary

To discuss how you can use Microsoft Office Communicator or Live Meeting in your area contact your Business Relationship Manager.  [www.ntu.ac.uk/information_systems/help support/contact/index.html](http://www.ntu.ac.uk/information_systems/help support/contact/index.html)

A printable user guide and FAQs can be found on the Information Services Website.  [www.ntu.ac.uk/IS](http://www.ntu.ac.uk/IS)

If you wish to provide feedback on this learning material, please address this in an email to [CPLDenquiries@ntu.ac.uk](mailto:CPLDenquiries@ntu.ac.uk)

For more information on the services provided by CPLD please visit their website [www.ntu.ac.uk/CPLD](http://www.ntu.ac.uk/CPLD)

For more information on other services or software provided by IS, please contact [ITS Service Desk](http://www.ntu.ac.uk/IS) extension 88500 or visit [www.ntu.ac.uk/IS](http://www.ntu.ac.uk/IS)
Answer Key

Module 1:
Question 1 : I can only add NTU Staff to my contact list: B) False
Question 2 : Contacts can belong to more than one contact group: A) True
Question 3 : I can block people from emailing me, using Access Levels: B) False

Module 2:
Question 1 : What's the easiest way to know which access level you want to assign to a contact?: C) Read the descriptions on the menu
Question 2 : Where would you click to change your Presence Level to Busy: On the Presence Button (coloured circle next to my name)
Question 3 : What is the quickest way to start an Instant Message: B) Double Click on a contact's name

Module 3:
Question 1 : Which button would you click on to invite another contact to join your conversation: The Invite Button.
Question 2 : To call a contact in Communicator 2007, you can either search for the contact in the Search box or type the phone number of the contact in the Search box and click the Call button: A) True