

# Enterprise Instant Messaging, Presence, and Contacts Etiquette

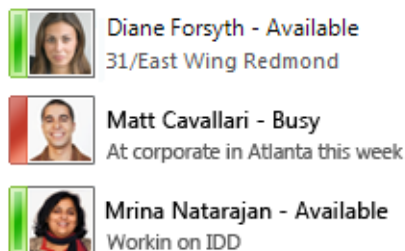
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Welcome to enterprise instant messaging (IM)! Powered by Microsoft Lync Server 2010 and designed for use in a business environment, Microsoft Lync 2010 allows you to more securely exchange text messages, files, and more, in real time. It also allows you to share your online presence with coworkers, customers, and partners. This document provides guidelines and best practices to help you use IM, presence, and your Contacts list effectively in your organization. While these guidelines are generally accepted best practices, policies might vary in your organization.

## Instant Messaging

Less intrusive than a phone call and quicker than email, IM use is rapidly increasing in business settings. Here are some tips and guidelines to help you make better and faster decisions with IM.

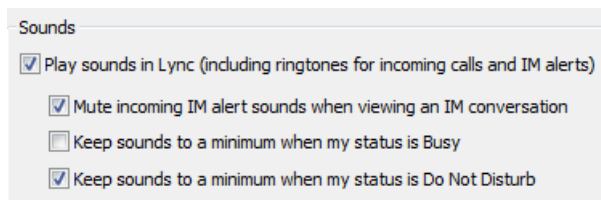
- Before sending an IM, check the person's presence status.
  - If the presence status is Available (the presence icon is green), the person is willing to be contacted, so you can start an IM conversation with him or her.
  - If the presence status is Busy (the presence icon is red), refrain from sending a message unless it's urgent.



**Figure 1. Presence status in the Contacts list**

- If the presence status is Busy - In a Call, the person might be slow to respond or might not respond at all. Responses will vary by person and by the nature of the call.
- If the presence status is Do Not Disturb, do not send a message unless it's an emergency.

- Unlike email, IM is conversational, similar to a face-to-face discussion. Don't worry about strictly taking turns or using spelling and grammar that isn't perfect because doing so will artificially slow down the conversation.
- If you are initiating the IM conversation, your first message should state the topic and ask the other person if they have time to chat with you (for example, "Got a moment to discuss the Contoso account?"). This might not be necessary with someone you work with frequently and when the question is quick and simple (for example, "Are you going to join us for the meeting?").
- Don't take offense if your contact doesn't respond immediately—he or she might be unable to do so, even if the presence status is Available. Assume the contact will respond when free. Avoid sending multiple messages when you don't get a response.
- If you receive a terse IM response (for example, "in a meeting - talk later"), don't be offended. While this might be considered a rude response in person, it's a perfectly acceptable way for a contact to let you know they're unavailable for an IM conversation at the time.
- Use of emoticons—graphical representations of facial expressions—can be useful in providing context around the text of your messages. They can help support a more natural form of communication.
- Avoid having too many "goodbyes" as you and your colleague end the conversation. The first person to indicate an end to the conversation is usually enough.
- If you are in a meeting or call, it is best to turn off IM sound to ensure the sound of incoming instant messages won't be disturbing to others who might be meeting with you. To turn off sound for incoming IM alerts, in the upper right corner of the Lync main window, click the Options button, click Ringtones and Sounds, and then, under Sounds, select the appropriate check boxes (see Figure 2), and then click OK.



**Figure 2. Alerts**

- Don't use all capital letters to type your message. As with email, it is the IM equivalent of shouting.
- Don't invite someone to join a multiparty IM session in progress without first asking the others in the session if it is OK to do so.

## Managing Your Presence Status

- When you need to focus on high priority tasks, set your presence status to Busy to let coworkers know that you are not available for an IM conversation at the time.
- When you are on the phone, your status is automatically set to Busy and shows “In a Call.” People can send an instant message to you but should understand that you might be slow to respond or might not respond at all.
- If you absolutely cannot be disturbed (for example, during a presentation), you can set your status to Do Not Disturb. Use Do Not Disturb sparingly because appearing too often as “Do Not Disturb” is similar to rarely answering your phone or email.
- If you will be away or in training, it’s a best practice to leave a note about where you are. Type your note in the note box above your name.

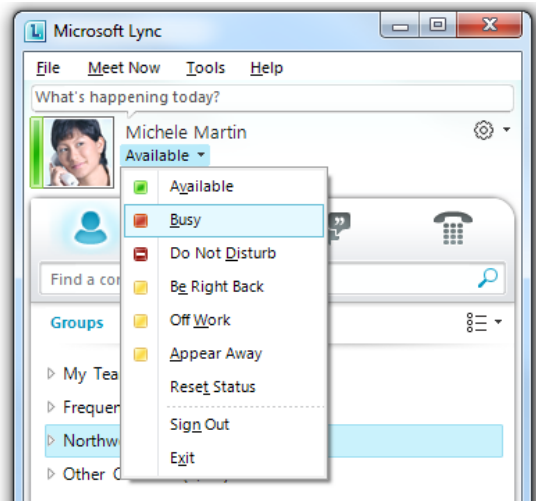
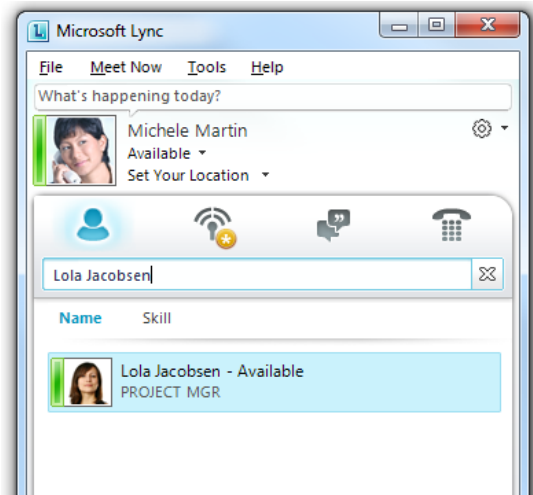


Figure 3. Presence status

## Managing Your Contacts List

- If someone adds you to their Contacts list, a notification appears that also gives you the option of adding that person to your Contacts list, but you are not obligated to do so. You can gently decline by checking the appropriate option in the notification and clicking OK.
- You don't need permission to add someone to your Contacts list. However, by default, when you add someone to your Contacts list, that person receives an alert about your action.
- To add a someone to your Contacts list, type the person's name in the search box, and then drag the name from the search results into a group (other than Recent Contacts) in your Contacts list.



**Figure 4. Searching for contacts**

**Note** If you have any questions about specific rules related to instant messaging and presence usage in your organization, contact your manager or your IT department.