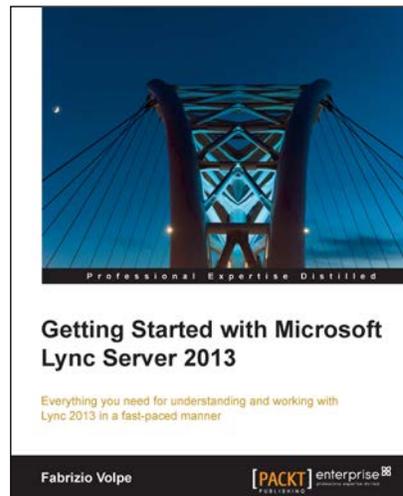


Getting Started with Microsoft Lync Server 2013

Fabrizio Volpe



Chapter No. 6 "Deploying Persistent Chat Server"

In this package, you will find:

A Biography of the author of the book

A preview chapter from the book, Chapter NO.6 "Deploying Persistent Chat Server"

A synopsis of the book's content

Information on where to buy this book

About the Author

Fabrizio Volpe has been working with the Iccrea Banking Group since 2000, as a network and systems administrator.

He is part of the Microsoft Technologies workgroup in Iccrea Banca, managing more than 2000 users at their central site, a nationwide network of branch offices, and providing services for more than 400 banks.

Since 2011, he has been awarded MVP on Directory Services from Microsoft, and is focused on Windows systems and security, unified communication, and virtualization.

Prior to the Iccrea Group, Fabrizio has collaborated with various IT companies, focused on Windows, security, networking, and messaging / unified communication products.

Since 2000, he has presented many events and conferences (Italian and international ones).

Fabrizio is committed to create contents that are accessible to a wide number of people, so he publishes content really often on SlideShare (<http://www.slideshare.net/fabriziov>), on his Lync2013 channel on YouTube (<http://www.youtube.com/user/lync2013>), and on his personal blog (<http://blog.lync2013.org>).

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Getting Started with Microsoft Lync Server 2013

Lync 2013 is really hard to describe in a few words. We are talking about a product that enables users to perform instant messaging, audio conferencing, and video conferencing. This product features Enterprise Voice that includes the capability to integrate itself with legacy PSTN and PBX through a gateway. We are able to grant access to external users via the Internet in a secure manner, and they will have a Lync experience not different from the one users have in an internal network. Such richness with regard to features and such flexibility makes Lync 2013 a game changer in the world of unified communication (UC). If we are going to deploy a new office in a "green field" situation, if we need to replace an old telephony infrastructure, if we want to enable our users to "anywhere" access for audio and video conferencing, or if we are evaluating a cloud solution for a part of our company or branch offices, the answer to all these different situations may always be Lync.

The strong integration with existing Active Directory, Exchange, and SharePoint deployments implies that a lot of IT professionals who were not interested in the UC world before, are now involved in the deployment, design, and management of Lync. Also, people who already have a good experience with other solutions, will be increasingly interested in Lync as a potential solution to add to their toolbox. And that is why this book exists. If you need to get started with Lync 2013, or there are some features that you would like to know better, I hope that you find your answer here.

What This Book Covers

Chapter 1, Installing a Lync 2013 Enterprise Pool, introduces the basic concepts of Lync 2013, and explains in a step-by-step manner the deployment of an Enterprise pool of Lync.

Chapter 2, Understanding Front End Pool Pairing, explores Front End pairing, which is a new feature of Lync 2013, that enables a high level of resiliency using different servers that may have been deployed (also) on different sites. In this chapter, we will see what pool pairing is and how to configure it.

Chapter 3, Deploying Lync Mobility, demonstrates mobility as one of the most requested and interesting features of Lync 2013. This chapter explains how to enable external users on Lync, and how to support mobile devices.

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Chapter 4, Integrating Lync Mediation Server, explains why whenever we are going to deploy Enterprise Voice, the first Lync role we need is the Mediation Server. This is a function that has an enormous impact on our design and implementation, and we will try to deeply dive into it during the chapter.

Chapter 5, Getting Started with Lync Enterprise Voice, introduces all the basic concepts and tasks required to deploy a VoIP solution with Lync 2013 inside our company. Although the topic is really massive, the ideas presented here will give the base to start working with Enterprise Voice.

Chapter 6, Deploying Persistent Chat Server, introduces Persistent Chat, which is a new feature of Lync 2013, that enables the creation of a knowledge base for your users and the construction of "private" spaces, where a selected groups of our users are able to communicate. Here we will see how it works and how it is implemented.

Chapter 7, Choosing Lync 2013 Clients, focusses on knowing all the existing clients, their characteristics, and limits as a fundamental step to design the right solution and to achieve the best result for you users with the least effort. Here we will explore the different available solutions.

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6

Deploying Persistent Chat Server

Persistent Chat Server is a new functionality of Lync 2013 (Lync Server 2010 had the group chat that was really different). Persistent Chat enables chat and IM conversations to be continued over time. Some of the more interesting new features related to Persistent Chat in Lync 2013 are the administrative interfaces integrated in the Lync Server Control Panel, the deployment managed through the Topology Builder, and the new solutions dedicated to high availability. Persistent Chat is a Lync role that can live by itself as a single server or as a dedicated pool, but the Persistent Chat Front End could also be collocated with a Lync Server 2013 Standard Edition.

Why Persistent Chat

The main advantage of the Persistent Chat Server over a normal mail communication is that the entire flow of conversation is always available. People who will take part in the conversation a second time have the opportunity to read all the information that has been exchanged. Persistent Chat is also powerful as a single reference point, where all the users interested in a certain project are sure to find the data they need. Scenarios such as brainstorming and sharing information between employees at different workplaces and working shifts are the best ones for such a feature.

For More Information:

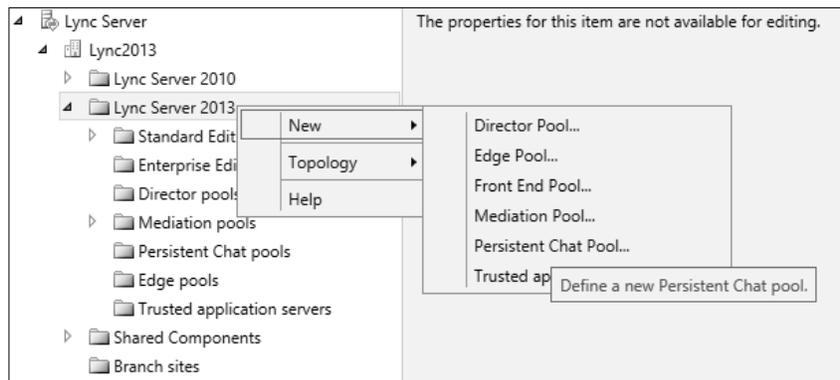
www.packtpub.com/getting-started-with-microsoft-lync-server-2013/book

Persistent Chat Server installation

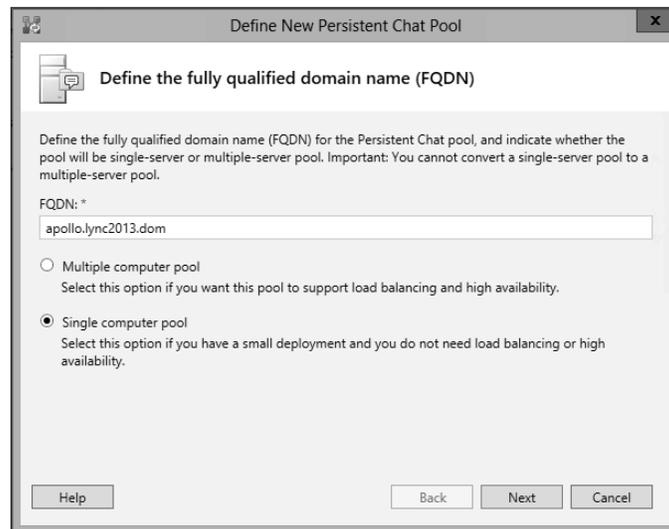
As we said before, depending on your Lync deployment, the Chat Server has to be deployed as a dedicated pool (with Lync Enterprise Edition), or can be collocated (Lync Standard Edition). The Persistent Chat requires a dedicated instance on a database (mandatory in the first scenario), or could also be collocated on the local SQL Express (in the second situation). In our example, we will deploy the service on a Standard Edition Server, but the database will be on a separate SQL Server with a dedicated instance.

The following are the steps to be performed for installing the Persistent Chat Server:

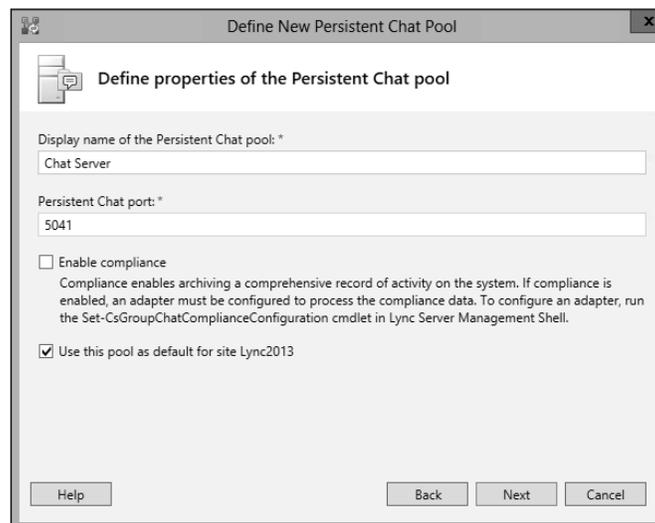
1. The first step, as we can see, will be performed in the Topology Builder, which is defining a new Persistent Chat pool (the menu is the same even if we collocate the role).



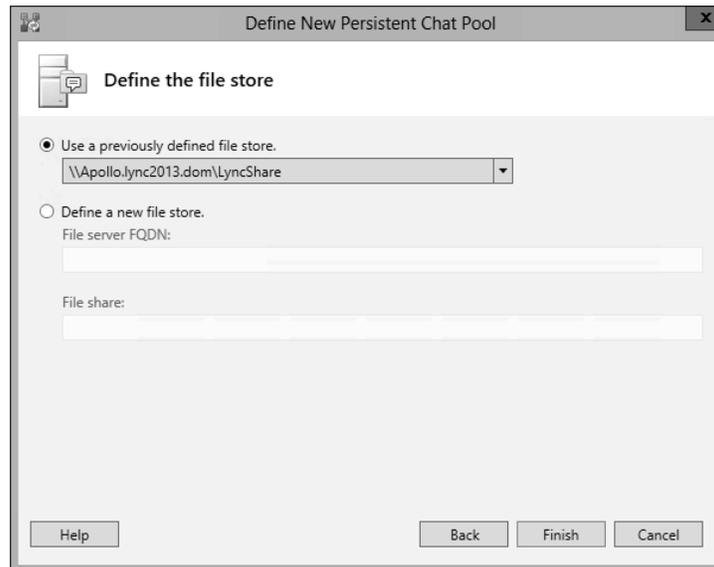
2. In a Standard Edition scenario, the value of the **FQDN** field is the name of the Lync Front End Server, where Persistent Chat will be collocated (see the following screenshot):



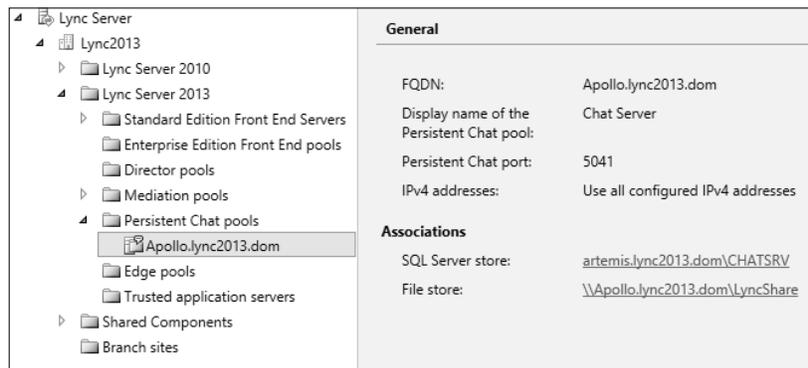
3. The following screenshot will require a display name that has no impact on the configuration. The compliance flag is important if our company needs to follow established guidelines, specifications, or legislations that require a record of our company's chat/IM activities. If we want to use this feature, a compliance service will be collocated on our Front End Server. The compliance feature also requires an additional database (`mgccomp`) that we can collocate in the SQL instance, where the Persistent Chat database (`mgc`) is installed (or in the SQL Express database of the Standard Edition Server, if we want to keep the number of servers as low as possible).



- The wizard will then require to define the SQL Server Store. The next configuration is related to the file store (a copy of any file uploaded will be saved there). The user that is performing the configuration needs to have full control on the folder (the Topology Builder will need this kind of access to configure a set of permissions). It is mandatory for the path to be of a **Universal Naming Convention (UNC)** if we have more than one Persistent Chat Server, or else we can select a local path too. In the following screenshot, we have preferred to use a UNC, and also the folder is a local one.



- If we are happy with the configuration (in our example, the one shown in the screenshot), we will be able to publish the topology, as we have done in the previous chapters.

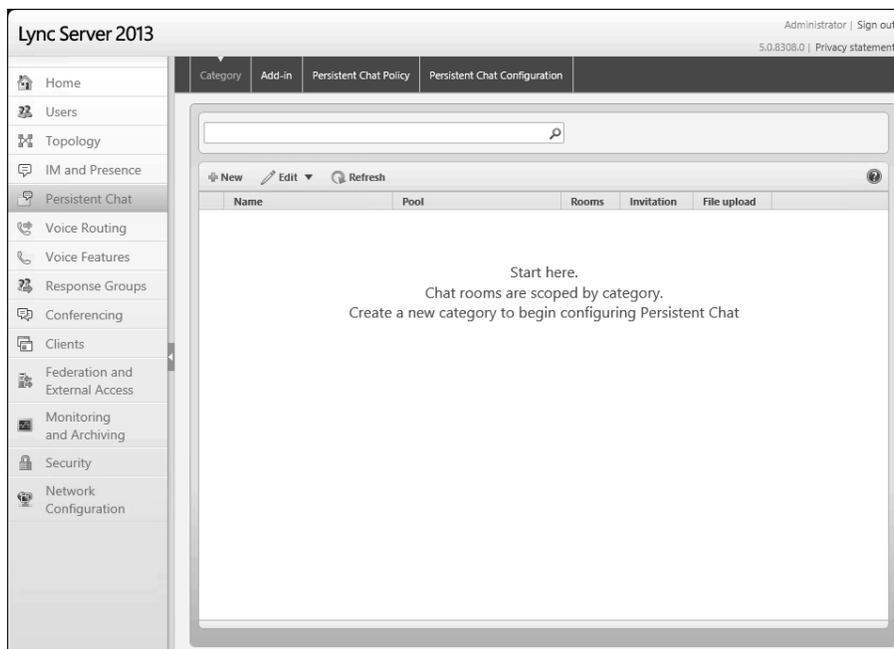


6. The Topology Builder will also create the Persistent Chat database, as shown in the following screenshot:

Database creation complete		
	Step	Status
✓	Creating Database artemis.lync2013.dom\CHATSrv...	Success

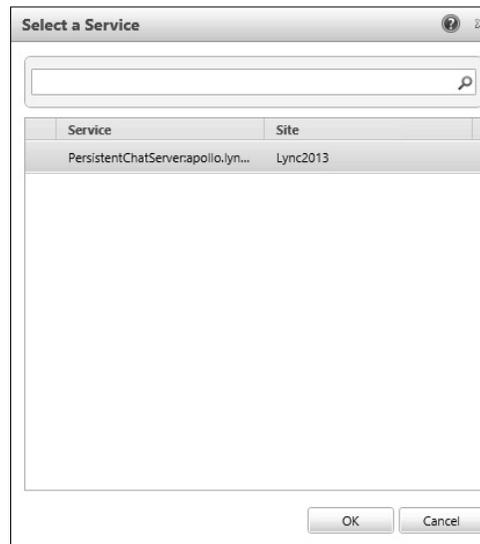
Managing categories, chat rooms, and privacy

All the conversations in Lync 2013 Persistent Chat are organized in "rooms". These rooms are known as chat rooms, and could be used as a logical separation between different topics and working groups. In every room, we will find messages, attachments, and information that have been added over time. Characteristics and management of the rooms are dictated by categories that we define through the administrative tools of Lync. The first mandatory step is to define a category as we can see in the following screenshot; this can be done using the Control Panel.



The following are the steps to be performed for managing chats, categories, and privacy:

1. The first step (shown in the following screenshot) is to select the chat service on which we are going to work (because we could have deployed more than one service or the Persistent Chat pool).



2. We are able to define a name for the category-related features such as invitations and uploads, and a list of members (allowed to participate in rooms of such a category) such as denied members (that will be excluded) and creators (that will be able to create rooms in the category, and in this way receive a sort of "delegation" in the management of Persistent Chat).

As you can see in the following screenshot, we have some options:

- **Enable invitations:** If this option is selected, rooms may or may not be allowed to have invitations; if cleared, the rooms are not allowed to have invitations.
- **Enable file upload:** If this option is selected, the rooms can enable or disable file uploads; if cleared, the rooms are allowed to have file uploads.
- **Enable chat history:** If this option is selected, room chats become non-persistent.

New Category

Commit Cancel

Pool: apollo.lync2013.dom

Name: *

Standard

Description:

Chat Standard

Enable invitations

Enable file upload

Enable chat history

Membership:

Allowed members:

Display name	SIP address
Fabrizio Volpe	sipfabrizio@lync2013.org

Denied members:

The Denied member list will override the Allowed member list.

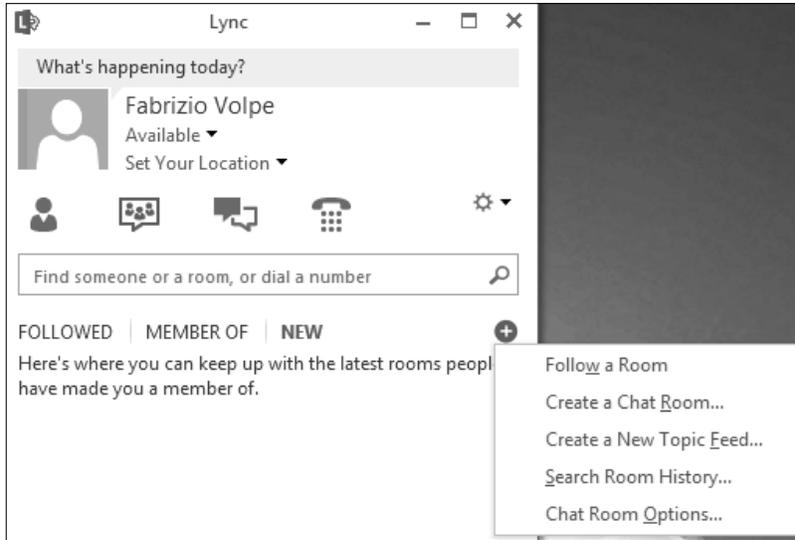
Creators:

Display name	SIP address
Fabrizio Volpe	sipfabrizio@lync2013.org

This is all we have to do in the administrative interface. The remaining part of the work is up to the user, connected from a "full" Lync client (the one included in the Office suite, as explained in *Chapter 7, Choosing Lync 2013 Clients*).

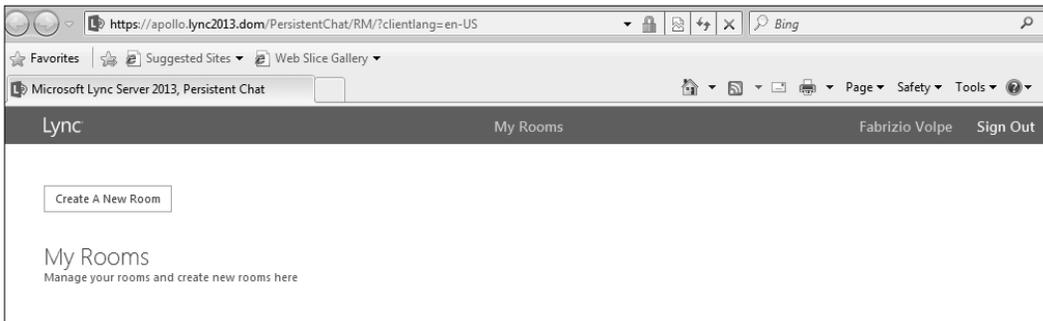
Users are able to search for rooms in categories where they are members. An exception is that the rooms are flagged as "secret" by the creator of the room. In such a scenario, only the users who are already members of the room will see the secret rooms in the search.

Now, we will create a whole new room, as shown in the following screenshot:



The following are the steps to be performed while creating a whole new room:

1. A web interface will be launched, and then the user will be able to generate a new room, as shown in the following screenshot:



2. The following screenshot shows the options available during the room's creation. The **Privacy** options will have an impact on the search and accessibility of the single room, as we have explained before.

Lync Create A Room Fabrizio Volpe Sign Out

Create a room

Create a new room

Room Name
Choose a unique name for this room

Description
Tell people what the room is for

 Remaining characters: 237

Privacy
Privacy setting controls who can access your room and whether it shows up in a room search

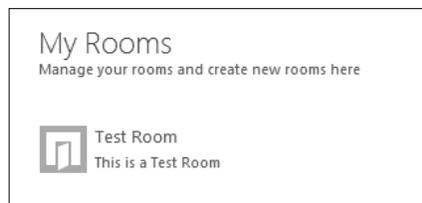
- Open
Let anyone find this room and see who's in it and read posts
- Closed
Let anyone find this room and see who's in it but only members can read posts
- Secret
Only members can find this room and read posts

Managers
Managers can choose members and edit settings. (Separate names by a semicolon.)

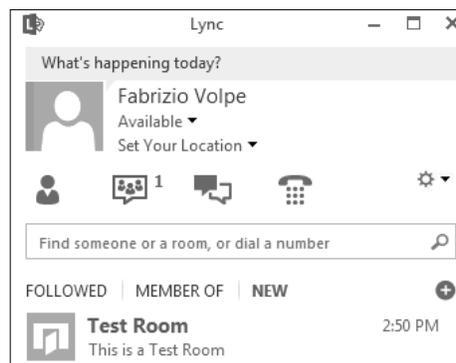
Members
Members can access the room. (Separate names by a semicolon.)

Inherit invitation setting from category (True).
 No invitation sent to members.

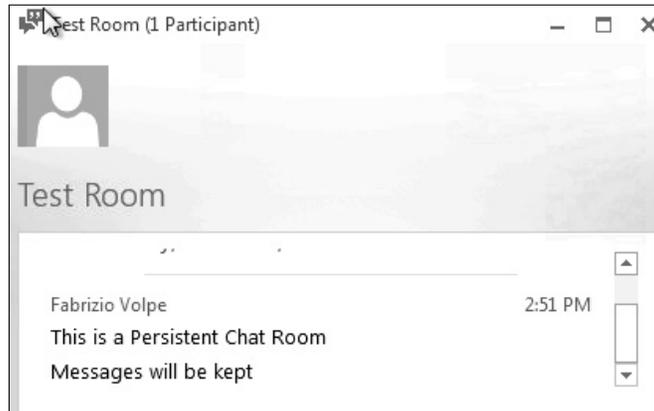
3. Now we are able to see a new room in the web interface.



4. The room will be shown in the client, and then we will be able to work inside it.



5. We will be able to interact in it by adding messages, documents, and so on, as we are able to see in the following screenshot:



Summary

As seen in this chapter, Persistent Chat Server is a good foundation on which we can build knowledge bases, and is really interesting when it comes to keeping information in an organized and easy-to-use form. The next chapter is focused on the clients. Lync offers a great deal of ways to access its services, and we will see all the available versions and solutions in order to give a flexible and straightforward interface to our users.

Where to buy this book

You can buy Getting Started with Microsoft Lync Server 2013 from the Packt Publishing website: <http://www.packtpub.com/getting-started-with-microsoft-lync-server-2013/book>.

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