

Novell Conferencing

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USER GUIDE

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About This Guide

This guide covers the end user operation of the Conferencing software client. The term “Conferencing” in this guide applies to all versions of Conferencing unless otherwise noted.

This guide provides information about the following:

- ♦ Setting Up Conferencing
- ♦ Getting Started
- ♦ Configuring Contacts and Buddies
- ♦ Setting Up and Joining Meetings
- ♦ Working in Meetings

Audience

This guide is intended for Conferencing administrators.

Software and Documentation Version

This guide describes features in Conferencing Version 1.0.1. This is the first version of this guide.

Feedback

We want to hear your comments and suggestions about this guide and the other documentation included with this product. Please use the User Comments feature at the bottom of each page of the online documentation, or go to [www.novell.com](http://www.novell.com/documentation/feedback.html) (<http://www.novell.com/documentation/feedback.html>) and enter your comments there.

Additional Documentation

You can find more information in additional Conferencing documentation:

- ♦ Conferencing Help system
- ♦ *Conferencing Quick Start Guide*
- ♦ *Conferencing Operations Guide*
- ♦ *Conferencing Server Installation Guide*

Change History

This table documents changes for recent revisions to this guide:

Guide Revision	Changes
0 (First Version)	

Documentation Updates

For the most recent version of the *Conferencing User Guide* and other documentation, visit the [Novell Teaming Web site \(http://www.novell.com/documentation/team_plus_conf\)](http://www.novell.com/documentation/team_plus_conf).

Conventions

This guide uses the following conventions:

A greater-than symbol (>) is used to separate actions within a step and items in a cross-reference path.

A trademark symbol (® , ™, etc.) denotes a Novell trademark. An asterisk (*) denotes a third-party trademark.

When a single pathname can be written with a backslash for some platforms or a forward slash for other platforms, the pathname is presented with a backslash. Users of platforms that require a forward slash, such as Linux* or UNIX*, should use forward slashes as required by your software.

Setting Up Conferencing

1

This section describes how to perform the initial setup tasks required to use Conferencing. The initial setup includes the following tasks:

- ♦ [Section 1.1, “Installing the Conferencing Client,” on page 9](#)
- ♦ [Section 1.2, “Starting Conferencing,” on page 9](#)
- ♦ [Section 1.3, “Configuring Your Personal Contact Information,” on page 13](#)
- ♦ [Section 1.4, “Configuring Your Follow Me Phone Number,” on page 15](#)
- ♦ [Section 1.5, “Using Correct Phone Number Formatting,” on page 16](#)
- ♦ [Section 1.6, “Installing and Setting Up the Pidgin Instant Chat Client,” on page 17](#)

1.1 Installing the Conferencing Client

- 1 Use the URL in the Welcome e-mail you receive to Install the Conferencing client. Use the username and the password in this e-mail to sign on to Conferencing. This e-mail also provides your personal PIN number and additional information. We recommend that you save this e-mail for future reference.

If you do not have a Welcome e-mail, the Conferencing client can be downloaded from the following URLs:

- ♦ Windows*: <http://conferencing-portal-hostname/imidio/downloads/conferencing.exe>
- ♦ Linux: <http://conferencing-portal-hostname/imidio/downloads/conferencing.rpm>

You need your Conferencing username and password to start the client after install.

If you have SSL enabled, you should specify https in the URL instead of http.

- 2 Select *Open* or *Run* to invoke the installer after the download completes.

It might take a while for the installation to begin on a Linux desktop.

After the client is installed, you can use either the `admin` screen name to sign on with the Conferencing client or you can use the screen name of the first user of the first community created earlier.

After you have signed on, you can add Conferencing users to the community. Refer to the *Conferencing Operations Guide* for information on adding users.

1.2 Starting Conferencing

This section contains the following topics:

- ♦ [Section 1.2.1, “Signing On,” on page 10](#)
- ♦ [Section 1.2.2, “Signing Off and Exiting,” on page 11](#)
- ♦ [Section 1.2.3, “Signing On As a Non-Registered User,” on page 11](#)
- ♦ [Section 1.2.4, “Important Information if You Are Behind a Proxy Server,” on page 12](#)
- ♦ [Section 1.2.5, “If Automatic Network Detection Fails,” on page 13](#)

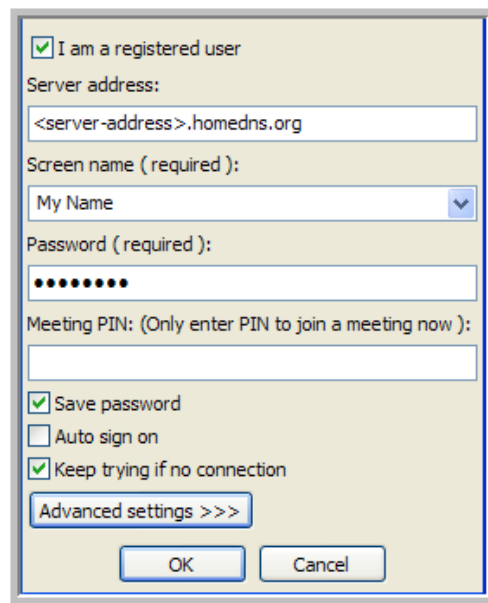
1.2.1 Signing On

- 1 In Linux and Windows, double-click the *Conferencing* desktop icon (placed on the desktop during install).

If you do not see the desktop icon, do the following:

- ♦ In Windows, select the *Start > All Programs > Conferencing > Conferencing*.
- ♦ In Linux, select *Computer*, click *More Applications*, and then select the Conferencing icon under *New Applications* or *Communicate*.

The Conferencing client appears.

A screenshot of a login dialog box for a conferencing client. The dialog has a light beige background and a blue border. At the top, there is a checked checkbox labeled "I am a registered user". Below this are four input fields: "Server address:" with the placeholder text "<server-address>.homedns.org", "Screen name (required):" with a dropdown menu showing "My Name", "Password (required):" with masked characters "••••••••", and "Meeting PIN: (Only enter PIN to join a meeting now):" which is empty. Below the input fields are three checkboxes: "Save password" (checked), "Auto sign on" (unchecked), and "Keep trying if no connection" (checked). At the bottom left is a button labeled "Advanced settings >>>". At the bottom right are two buttons: "OK" and "Cancel".

- 2 In the *Screen Name* field, type your screen name or select it from the menu.
 - ♦ Your screen name is your unique registered user name.
 - ♦ Screen names are how Conferencing and IM users recognize you.
 - ♦ Screen names are case sensitive and should not contain spaces.
 - ♦ Screen names should be alphanumeric only and should not contain non-ASCII characters. (For example: bathgate222 or gbookworm is accepted, but bathgate 222 or gbook~worm is not accepted.)

After the your initial login, your screen name appears in the *Screen Name* menu.

- 3 In the *Password* field, type your password.
- 4 Optional Settings:
 - ♦ To sign on and join a meeting at the same time, type a meeting PIN or the meeting ID into the *Meeting Pin* field.
 - ♦ To save your password, select the *Save Password* option. (If your administrator does not give you the right to use this option, it is not visible.)
 - ♦ To sign on automatically when Conferencing starts, select the *Auto Sign On* option (recommended). There are certain circumstances (depending on your **Administrative Policy**) when you are still prompted to sign on.

- ♦ To reconnect your client when there is no network connection present, select the *Keep Trying if No Connection* option (recommended).

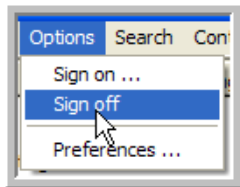
5 Click *Sign On* to log in.

The Conferencing Main window appears with your meeting list.

1.2.2 Signing Off and Exiting

To sign off from the Main Window, select the *Options > Sign Off* menu option.

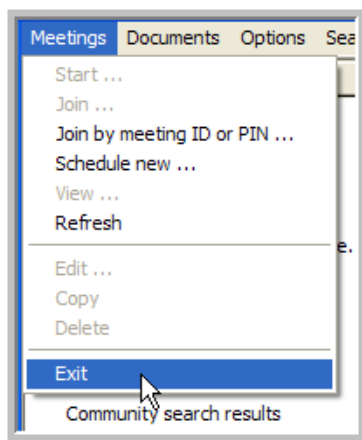
Figure 1-1 Options Menu



Signing off disconnects you from the Conferencing server, and your contact information is displayed to other users as grey, indicating that you are not online.

To exit from the Main Window, select the *Meetings > Exit* menu option.

Figure 1-2 Meetings Menu



Exiting ends your session and exits Conferencing. To sign on again see Signing On.

1.2.3 Signing On As a Non-Registered User

If you are not a registered user, deselect the *I am a registered user* option, and then configure the following information:

- 1 In the *Full Name* field, type your full name, first name, and then last name.
- 2 In the *Meeting Pin* field, type your Meeting PIN.

The Meeting PIN is automatically filled out for most invitations. If you manually installed your client because your organization does not support ActiveX in browsers, you need to enter the Meeting PIN manually. The PIN is found on the web page that comes with a meeting invitation link.

- 3 In the *Phone* field, type your phone number (optional).
- 4 In the *Email* field, type your e-mail address (optional).
- 5 Click *Sign On* to log in.

The Conferencing Main window appears with your meeting list.

1.2.4 Important Information if You Are Behind a Proxy Server

The meeting software automatically uses the network settings configured for Internet Explorer*. In most cases, if you are able to use Internet Explorer, you are able to connect to a meeting. If you use an alternate browser, you might need to configure your LAN settings for your specific proxy server before you can join a meeting.

NOTE: You might need to ask your administrator for your proxy server settings.

To Configure Your Proxy Server Settings in Windows:

- 1 Select *Start > Control Panel*.
- 2 Double-click *Internet Options*.
- 3 Select the *Connections* tab.
- 4 Click on *LAN settings...*
- 5 Select the *Proxy server* option and configure with your proxy server settings.

1.2.5 If Automatic Network Detection Fails

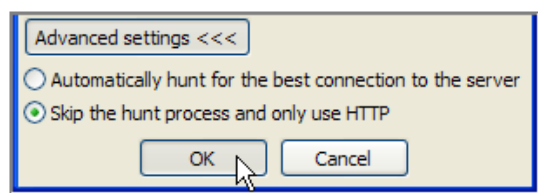
The meeting software automatically determines the best means for connecting through most firewalls and proxy servers. If you wait for more than 2 minutes to sign on or get disconnected from a meeting after a short time, the client might be selecting the wrong method.

1 Click *Advanced Settings* at the bottom of the *Sign On* screen.

2 Select the *Skip Hunt Process and Only Use HTTP* option.

This forces the meeting software to skip the normal detection process and use the more dependable but slower HTTP protocol.

3 Click *OK*.



1.3 Configuring Your Personal Contact Information

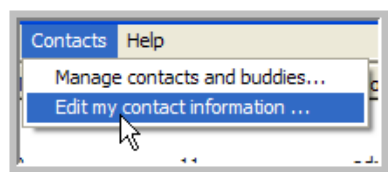
It is a good idea to edit your own contact information and add any additional information you want other users to see.

This section contains the following topics:

- ♦ [Section 1.3.1, “Setting Up Your Contact Information:,” on page 13](#)
- ♦ [Section 1.3.2, “Read-Only Fields,” on page 14](#)
- ♦ [Section 1.3.3, “Informational Fields,” on page 14](#)
- ♦ [Section 1.3.4, “Admin Only Fields,” on page 15](#)

1.3.1 Setting Up Your Contact Information:

1 From the main window, select the *Contacts > Edit My Contact Info* menu item.



The *Edit User* window appears.

Address book:	Community Address Book
Group:	My contacts and buddies
Screen name:	user
Password:	*****
Administrator:	No
Policy:	
Title:	writer
First name:	userfirst
Middle name:	
Last name:	userlast
Suffix:	
Company:	mycompany
Job title:	writer
Address 1:	
Address 2:	
City:	
State:	
Country:	
Postal code:	
Email 1:	me@mycompany.com
Email 2:	
Email 3:	
Business phone:	123-123-1234
Home phone:	
Mobile phone:	
Other phone:	
AIM screen:	
Yahoo screen:	
Messenger screen:	
User 1:	
User 2:	

OK Cancel Help

2 Edit your personal information (see the descriptions for the fields below).

1.3.2 Read-Only Fields

The following fields present information about your configuration. You cannot modify these fields.

- ♦ *Address Book (read only)*: Lets you know whether your administrative policy allows you to use the Community Address Book, which is your global company-wide book.
- ♦ *Group (read only)*: Lists the Group for a contact.

1.3.3 Informational Fields

The following fields allow you to enter information about yourself, your location, and your contact information. It is not necessary to complete each field; however, your contact information can be viewed by others:

- ♦ *Title*: Use this field to set up a salutation title, such as Mr., Ms., Dr., and so on.
- ♦ *First Name*: Your first name.
- ♦ *Middle Name*: Your middle name.
- ♦ *Last Name*: Your last name.
- ♦ *Suffix*: Use this field to identify a suffix, such as PhD, MD, Sr., III, and so on.
- ♦ *Company*: Your company name.

- ♦ *Job Title*: A job title or job description.
- ♦ *Address1*: Use this field to identify an address.
- ♦ *Address2*: Use this field to identify an address.
- ♦ *Other Phone*: Use this field to specify another phone number, such as a pager or second mobile phone number.
- ♦ *State*: Your state.
- ♦ *Country*: Your country.
- ♦ *Postal Code*: Your postal or ZIP code.
- ♦ *Business Phone*: Your business phone number.
- ♦ *Home Phone*: Your home phone number.
- ♦ *Mobile Phone*: Your mobile or cell phone number.
- ♦ *Extension*: If your company uses telephone extensions, specify your extension. This extension is not used when dialing your business phone number.
- ♦ *Email*: Your primary e-mail address.
- ♦ *Email2*: Your secondary e-mail address.
- ♦ *Email3*: An additional e-mail address.
- ♦ *User1*: Use this field to store additional information.
- ♦ *User2*: Use this field to store additional information.

1.3.4 Admin Only Fields

The following fields are available only to the Administrator:

- ♦ *Screen Name*: Name of user. This is the name used to sign on to the system. The Screen Name is case sensitive, cannot contain any spaces, and must be alphanumeric.
- ♦ *Password*: Password of the user.
- ♦ *Administrator*: Yes; No
- ♦ *Policy*: Settings and limits assigned to a user.

NOTE: To see which settings are affected see [Chapter 4, “Administration Policies,” on page 79](#).

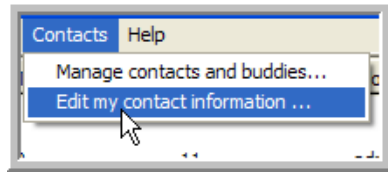
1.4 Configuring Your Follow Me Phone Number

The Follow Me phone number allows you to specify the phone number that the contacts in your Personal Buddy list should use to contact you (you can only see Follow Me phone numbers for contacts in your Personal Buddy list).

IMPORTANT: The Follow Me phone number feature is not available in this release.

To Add or Modify Your Phone Numbers:

- 1 Select *the Contacts > Edit My Contact Info* menu item.



- 2 Add or modify the phone numbers in the *Business Phone*, *Home Phone*, *Mobile Phone*, or *Other Phone* fields.

Business phone:	123-123-1234
Home phone:	234-345-3456
Mobile phone:	345-234-1234
Other phone:	

- 3 If you have an extension in your phone number type the letter “X” before the extension. For example, (351) 123 4321 x987.

The extension field is not used by the server to dial phone numbers.

- 4 After you have modified the information, click *OK*.

To Enable Your Follow Me Phone Number:

Use the drop-down menu via the Pidgin IM Client to select a phone number. Your Follow Me number is stored on the Conferencing server so that other users know how to contact you even if your client is not running.

When scheduling meetings, you should use Follow Me phone numbers for both yourself and your contacts. Conferencing automatically updates these numbers from the server if you or any contact changes the Follow Me number.

NOTE: If you specify a phone number when scheduling or editing your own meetings (including your Instant Meeting), the system does not automatically know where you are when you start the meeting. If you specify a phone number for a contact in one of your meetings, and that contact changes his or her Follow Me number, the contact might not receive a meeting message when you start the meeting.

1.5 Using Correct Phone Number Formatting

When editing or adding phone numbers, follow the same rules that Conferencing uses to dial phone numbers:

- ♦ 7-digit numbers without area codes are treated as local calls.
- ♦ 10-digit numbers are in the North American dialing region.
- ♦ Numbers that begin with a + sign have a country code following the + sign (for example, +1 123-123-1234).
- ♦ An international call is placed if the country code is not the North American region (country code = 1).
- ♦ Numbers that begin with the international dialing prefix (011) are interpreted without the prefix as if they begin with a + sign (for example, 011 1-123-123-1234 = +1 123-123-1234)

- ♦ Numbers that contain an `x` are have an extension after the `x` (for example, 123-1234 x 123).
- ♦ Conferencing dials extensions according to these rules:
 - ♦ If the user places a 1-to-1 call, the extension is not dialed. The expectation is that the caller provides the extension when the call is answered.
 - ♦ If the user places a conference call, the system dials the extension after the auto-attendant answers the call. After the dialing the extension, the system waits for the invitee to accept the meeting invitation.
 - ♦ Use the `*` and the `#` characters in a number to access auto-attendant functions (for example, 123-1234*123).
 - ♦ Use a comma (,) to have the system pause briefly before dialing the remaining digits. (for example, *89,123-1234)
 - ♦ Conferencing only recognizes the (`*` `#` , `x` `X`) characters and digits 0-9 and ignores all other characters.

1.6 Installing and Setting Up the Pidgin Instant Chat Client

This section includes the following topics:

- ♦ [Section 1.6.1, “Downloading the Pidgin Client,” on page 17](#)
- ♦ [Section 1.6.2, “Setting Up Your Pidgin Client,” on page 18](#)
- ♦ [Section 1.6.3, “Accessing the Pidgin Conferencing Features,” on page 19](#)

1.6.1 Downloading the Pidgin Client

After you install the Conferencing server, the Pidgin client with Conferencing protocol support can be downloaded from the following URLs.

- ♦ Windows: <http://conferencing-portal-hostname/imidio/downloads/pidgin.exe>
- ♦ Linux: <http://conferencing-portal-hostname/imidio/downloads/pidgin.rpm>

These files (or file locations) should be provided to you via a URL (e-mail).

- 1 Download the `pidgin.exe` (Windows) or `pidgin.rpm` (Linux) executable file to your desktop.
- 2 In Linux and Windows, double-click the *pidgin* (`.rpm` or `.exe`) installer (placed on the desktop during download), or select *Open* or *Run* to invoke the installer.



It might take a while for the installation to begin on the Linux desktop.

- 3 In the *Installer Language* dialog that appears, select your language from the drop-down list. The installer wizard walks you through the installation process. The defaults should work for your install, although you might want to select the *Shortcut > Desktop* option.

- 4 Click *Finish* to complete the installation process.

The integrated Pidgin instant chat client is now installed and ready for use.

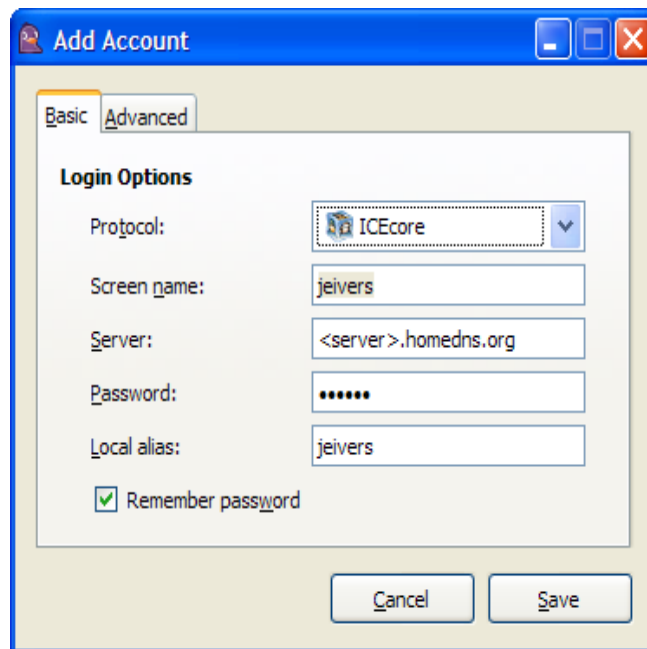
See the Conferencing online help or the *Conferencing User Guide* for information on using the integrated Pidgin client with Conferencing.

1.6.2 Setting Up Your Pidgin Client

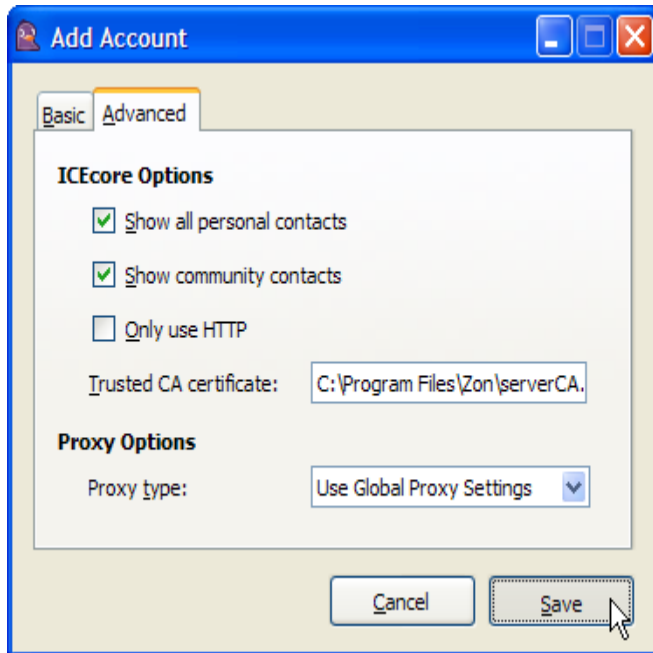
- 1 Start Pidgin.
- 2 In the *Accounts* dialog that appears, click *Add*.

If the *Accounts* dialog does not automatically appear, select the *Accounts > Add/Edit* menu item from the Pidgin Buddy List window.

- 3 Under the *Basic* tab in the Add Account window:



- 3a Select *ICEcore* from the *Protocol* drop-down list.
- 3b Type in your Conferencing screen name in the *Screen Name* field.
- 3c Type in the Conferencing server address in the *Server* field.
- 3d Type in your Conferencing password in the *Password* field.
- 3e Type in the alias name you would prefer to use in Pidgin instant chat client.
- 3f Select the *Remember Password* option to avoid typing in your password each type you start instant chat.
- 4 Under the *Advanced* tab, select the *ICEcore Options* you want for importing your Conferencing contacts:

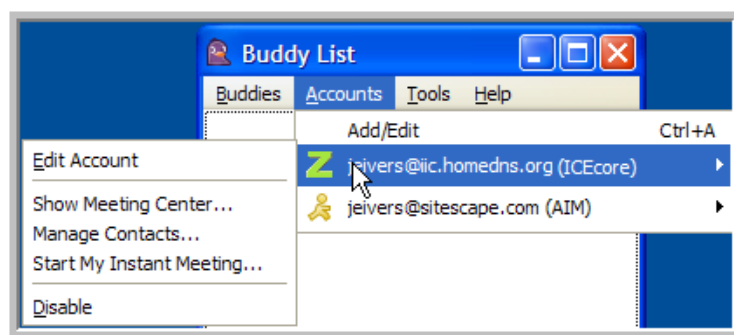


- 4a Select *Show All Personal Contacts* to import all your personal contacts from Conferencing.
- 4b Select *Show Community Contacts* to import all the contacts from the Conferencing Community Address Book.
- 5 Click *Save*.

1.6.3 Accessing the Pidgin Conferencing Features

Selects *Accounts > Your Conferencing Account* to view the Conferencing menu items that are available:

Figure 1-3 Accounts Menu



- ♦ *Edit Account*: Select this menu item to edit your Pidgin Conferencing account. For more information, see [“Setting Up Your Pidgin Client” on page 18](#).
- ♦ *Show Meeting Center*: Select this menu item to open the Conferencing Main Window.
- ♦ *Manage Contacts*: Select this menu item to open the Conferencing Manage Contacts and Users Window. For more information, see [“Configuring Your Contacts and Buddies” on page 35](#).

- ♦ *Start My Instant Meeting*: Select this menu item to start your Conferencing Instant Meeting. For more information, see “[Running and Editing Your Instant Meeting](#)” on page 45.
- ♦ *Disable*: Select this menu item to disable your Pidgin Conferencing account.

Configuring Conferencing

2

This section describes how to configure Conferencing and includes the following topics:

- ♦ [Section 2.1, “Configuring Your Preferences,” on page 21](#)
- ♦ [Section 2.2, “Understanding Conferencing Concepts,” on page 26](#)
- ♦ [Section 2.3, “Configuring Your Contacts and Buddies,” on page 35](#)

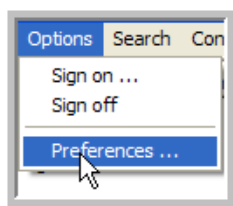
2.1 Configuring Your Preferences

Your preferences define the behavior for many available features. The following preference tabs are covered in this section:

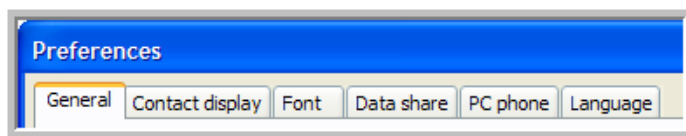
- ♦ [Section 2.1.1, “Setting Your Preferences:,” on page 21](#)
- ♦ [Section 2.1.2, “General Preferences,” on page 22](#)
- ♦ [Section 2.1.3, “Contact Display Preferences,” on page 22](#)
- ♦ [Section 2.1.4, “Font Preferences,” on page 24](#)
- ♦ [Section 2.1.5, “Data Share Preferences,” on page 25](#)
- ♦ [Section 2.1.6, “PC Phone Preferences,” on page 25](#)
- ♦ [Section 2.1.7, “Language Preferences,” on page 26](#)

2.1.1 Setting Your Preferences:

- 1 Select the *Options > Preferences* menu item.



- 2 Select the tab for the preferences you want to edit:

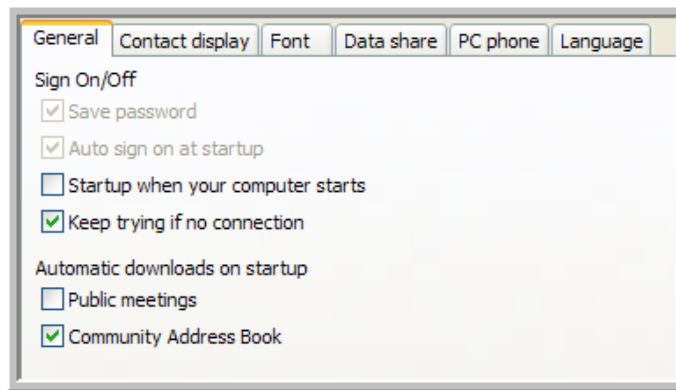


- ♦ *General*: Edit your *Sign On/Off* and *Automatic Downloads on Startup* options.
- ♦ *Contact Display*: Select the information (columns) you want to display for your contacts and the order that the columns appear.
- ♦ *Font*: Format the default text that appears in your Application and Chat windows.
- ♦ *Data Share*: Set data share preferences for your meetings.

- ♦ *PC Phone*: Set computer phone preferences for your meetings.
 - ♦ *Language*: Set your language preference.
- 3** To save your settings and close the *Preferences* window, click *OK*.
- or
- To close the *Preferences* window without saving, click *Cancel*.

2.1.2 General Preferences

Figure 2-1 *General Preferences Tab*



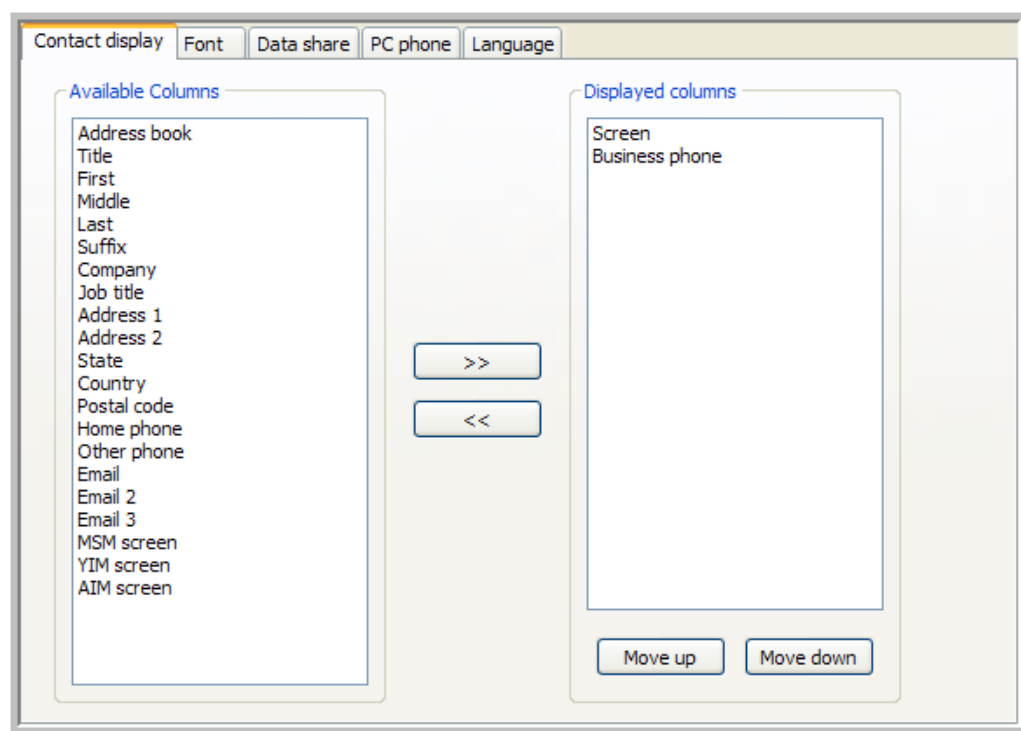
- ♦ Sign On/Off options:
 - ♦ *Save Password*: Select this option to save your password unless your policy setting prohibits this (to verify, check with your administrator).
 - ♦ *Auto Sign On at Startup*: Select this option to automatically sign on when Conferencing starts. You need to select the *Save Password* option before you select this option.
 - ♦ *Startup When Your Computer Starts*: Select this option if you want Conferencing to automatically launch when your computer starts.
 - ♦ *Keep Trying if no Connection*: Select this option to have Conferencing automatically connect/reconnect to the server when it detects an error in the network.
- ♦ Automatic Downloads on Startup options:
 - ♦ *Public Meetings*: Select this option to automatically download information on any public meetings when you start Conferencing.
 - ♦ *Community Address Book*: Select this option to automatically download the Community Address Book information when you start Conferencing.

2.1.3 Contact Display Preferences

Use the *Contact Display* tab to configure the information (columns) that display for your contacts.

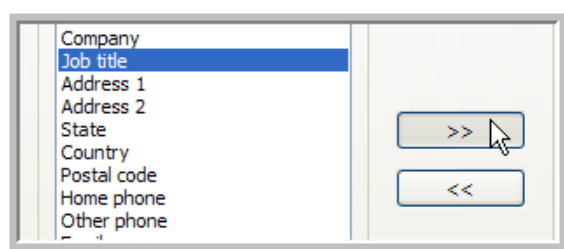
NOTE: This affects the Manage Contacts and Buddies and Select Contacts windows.

Figure 2-2 *Contact Display Preferences Tab*



To display a column:

- 1 Select the column you want to display for your contacts in the *Available Columns* list on the left (you can select more than one at a time).
- 2 Click the >> button to move the columns into the *Displayed Columns* list on the right.



The more columns you select, the longer it takes to populate the contact list when you start your client. Therefore, it is best to select only those columns you refer to regularly.

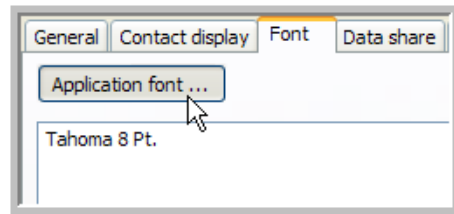
To select the order that the columns appear for your contacts:

- 1 Select a column in the *Displayed Columns* list on the right.
- 2 Use the *Move Up* and *Move Down* arrows to change the columns display order (top position appearing first).
- 3 Repeat the previous steps to position all the columns in the correct display order.

2.1.4 Font Preferences

To set the application font:

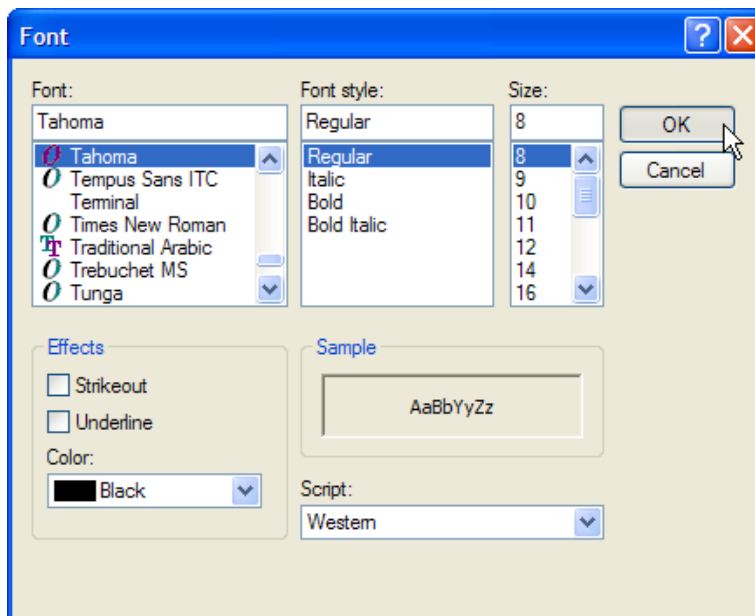
1. Click *Application Font*.











2. Select the *Font*, *Font Style*, *Size*, and *Affects* you want to use.
3. Click *OK*.

The text pane below the *Application Font* button displays a sample of the application text.

The text pane below the chat font tools displays a sample of the chat text.

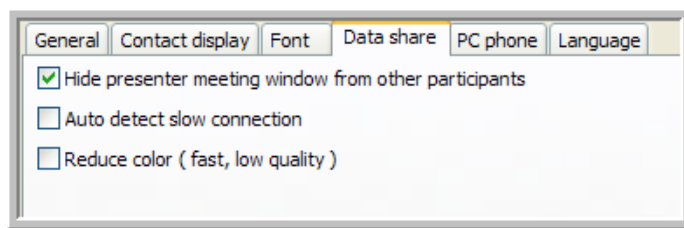


To set the Chat default font, use the following chat font tools:

- ♦  Set Foreground Color
- ♦  Set Background Color
- ♦  Decrease Font Size
- ♦  Set to Normal Font Size
- ♦  Increase font Size
- ♦  Set to Bold
- ♦  Set to Italics
- ♦  Set to Underline

2.1.5 Data Share Preferences

Figure 2-3 Data Share Preferences Tab



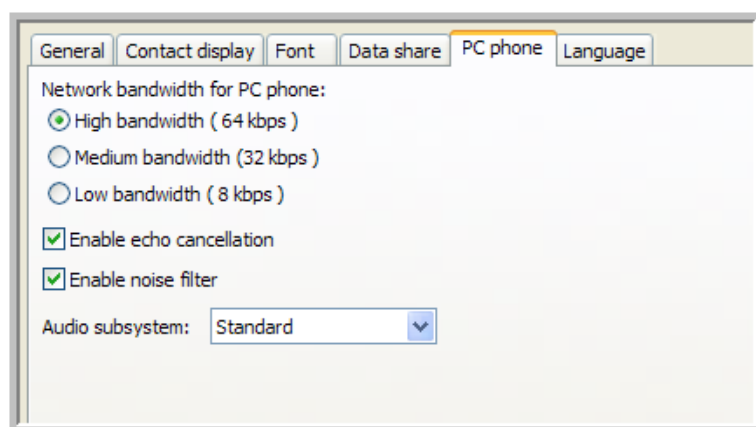
- ♦ *Hide Presenter Meeting Window from Participants*: Select this option to hide the Meeting window when sharing in full-screen mode.

This setting only takes effect if it is set prior to initiating a share session. Leave this setting off to share transparent windows. This setting has no effect for presenters running with Windows 98 (participants still see the Meeting window).

- ♦ *Auto Detect Slow Connection*: Select this option to detect poor connections and reduce the data that Conferencing sends to the participants (the shared data does not look as sharp).
A fast connection that comes up and down a lot, might be treated as a slow connection, so only use this setting if you anticipate participants with slow connections.
- ♦ *Reduce Color*: Select this option to load shared graphics faster, but at a lower quality.

2.1.6 PC Phone Preferences

Figure 2-4 PC Phone Preferences Tab

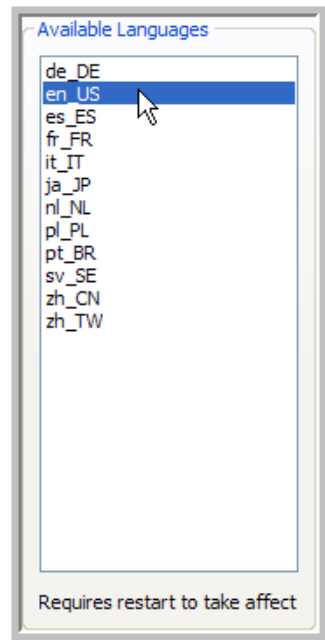


- ♦ *Network Bandwidth For PC Phone*: Select one of these options to set the bandwidth for your computer phone.
- ♦ *Enable Echo Cancellation*: Select this option to enable echo cancellation (recommended).
A fast connection that comes up and down a lot, might be treated as a slow connection, so only use this setting if you anticipate participants with slow or intermittent connections.
- ♦ *Enable Noise Filter*: Select this option to enable noise filter (recommended).

2.1.7 Language Preferences

Select the five-letter code that corresponds to your language.

Figure 2-5 *Language Preferences Tab*



2.2 Understanding Conferencing Concepts

This section describes the following topics:

- ♦ [Section 2.2.1, “Window Definitions,” on page 26](#)
- ♦ [Section 2.2.2, “Meeting PINs and Meeting IDs,” on page 27](#)
- ♦ [Section 2.2.3, “Main Window,” on page 27](#)
- ♦ [Section 2.2.4, “Contacts and Buddies Definitions,” on page 29](#)
- ♦ [Section 2.2.5, “Communities,” on page 30](#)
- ♦ [Section 2.2.6, “Presence,” on page 31](#)
- ♦ [Section 2.2.7, “Meeting Roles,” on page 32](#)
- ♦ [Section 2.2.8, “Phone Keypad User Interface,” on page 33](#)

2.2.1 Window Definitions

The following list describes the primary windows in Conferencing:

- ♦ *Main Window*: The main console window that is open when you log in to Conferencing. It contains a list of all your meetings.

The meeting list has the following categories of meetings:

- ♦ *Community Meetings*: Public, Private and unlisted meetings in your community (for administrators only).

- ♦ *All Public*: Public meetings in your community.
Your administrator determines if you have the right to view public meetings or if you must use *Search* to locate public meetings.
- ♦ *My Instant meeting*: Your Instant Meeting.
- ♦ *My Meetings*: Your Scheduled Meetings.
- ♦ *Invited*: Meetings to which you are currently invited.
- ♦ *Community Search Results*: A list of all your community meeting searches.
- ♦ *Meeting Setup Window*: Use the this window to set up a new meeting, start a scheduled meeting, or edit a scheduled meeting.
- ♦ *Meeting Search Window*: Use this window to search through the community meetings.
- ♦ *Meeting Information Window*: Use this window to view details for a specific meeting.
- ♦ *Meeting Window*: Use this window when running or joining a meeting. This window contains information about participants and their in-meeting status and allows you to chat and share data during a meeting.
- ♦ *Select Contacts Window*: Use this window to add contacts to a meeting from the *Meeting Setup* window.
- ♦ *Preferences Window*: Use this window to configure your Conferencing preferences. See [“Configuring Your Preferences” on page 21](#) for details on using this window.
- ♦ *Manage Contacts and Users Window*: Use this window to manage your contacts and personal buddies. See [“Managing Contacts and Buddies” on page 38](#) for details on using this window.
- ♦ *Contact Information Window*: Use this window to edit a contact’s information. See [“Editing a Contact’s Information” on page 41](#) for details on using this window.

2.2.2 Meeting PINs and Meeting IDs

You can use either a Meeting PIN or a Meeting ID to enter a meeting for public and unlisted meetings. However, an attendee must have a Meeting PIN in order to access a private meeting.

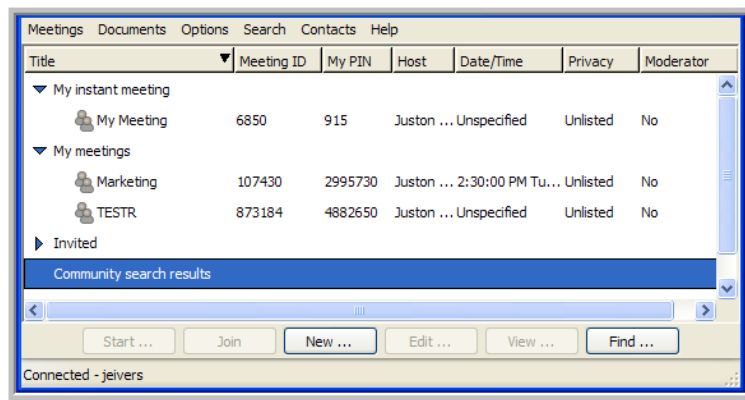
- ♦ *Meeting PIN*: A personal identifier that the meeting server uses to represent a specific attendee in a specific meeting.
- ♦ *Meeting ID* - A generic identifier that represents a specific meeting only (does not identify a specific attendee).

NOTE: Use the Meeting PIN to join meetings whenever possible so that the meeting server can identify you. You need to use the Meeting PIN to join any meeting where you plan to act as a moderator. If you join a meeting via phone using the Meeting ID, your name is listed as *anonymous* in the Meeting window.

2.2.3 Main Window

The Main Window is the place where you can find, create, start, join, and edit public meetings, your Scheduled Meetings, Invited Meetings, and your Instant Meeting.

Figure 2-6 Meeting Main Window



This section contains the following topics:

- ◆ “Meeting List Groups” on page 28
- ◆ “Meeting List Column Headings” on page 28
- ◆ “Meeting List Options” on page 29

Meeting List Groups

Each meeting type is represented by its own group in the meeting list:

- ◆ *All Public*: Meetings that are marked as public indicate that they are available to anyone in the community. Public meetings are set by configuring the meeting type option when you schedule a meeting.
- ◆ *My Instant Meeting*: Each user has one Instant Meeting available by default.
- ◆ *My Meetings*: The list of your Scheduled Meetings.
- ◆ *Invited*: Every Instant or Scheduled Meeting to which you are invited, including the following:
 - ◆ Scheduled Meetings where you are a persistent invitee.
 - ◆ Any in-progress Instant or Scheduled Meeting where you are an invitee (but not a persistent invitee).If the meeting is in-progress, the people icon on the left are green (this is referred to as meeting presence).
- ◆ *Community Meetings* (for administrators only): Lists all public, unlisted, and private meetings in your community.

Meeting List Column Headings

The Main Window displays the following information (columns) for your meetings:

- ◆ *Meeting ID*: A generic identifier that represents a specific meeting, but does not identify a specific attendee.
- ◆ *My PIN*: Your personal identifier for a specific meeting.
- ◆ *Host*: The host's screen name (the user who created the meeting).
- ◆ *Date/Time*: The scheduled time of the meeting (You can start a meeting at any time, regardless of the scheduled start time).

- ♦ *Privacy*: Indicates if a meeting is public, private, or unlisted.
- ♦ *Moderator*: Indicates if there is a moderator present for this meeting.

Meeting List Options

The following options are available for your meetings:

- ♦ **Start** - To start a meeting for which you are a moderator or the host, select the meeting, and then click *Start* (also available as a menu item under *Meetings* or by right-clicking). You must exit any meeting in which you are currently participating before starting another meeting.
- ♦ **Join** - To join a meeting, highlight the meeting, and then click *Join* (also available as a menu item under *Meetings* or by right-clicking). If the meeting is not yet started, you get a `waiting for meeting to start` message. You are automatically brought into the meeting after a host or moderator starts it. You can also join a meeting by clicking on the invitation URL for that meeting.
- ♦ **New** - To create a new meeting, click *New* to open the *Meeting Setup* window, so you can schedule a new meeting.
- ♦ **Edit** - To edit a meeting, select the meeting, then click *Edit* (also available as a menu item under *Meetings* or by right-clicking). This opens the Meeting Setup window, so you can edit a scheduled meeting. Only a host can edit a meeting (persistent moderators cannot edit meetings).
- ♦ **View** - To view the Meeting Information window for a meeting, select the meeting, then click *View* (also available as a menu item under *Meetings* or by right-clicking).
- ♦ **Find** - To find a meeting, click *Find* to open the Meeting Search window.
- ♦ **Copy** - To copy an existing Scheduled Meeting as a template for creating a new Scheduled Meeting, right-click the scheduled meeting, and then select the *Copy* menu item (also available as a menu item under *Meetings*).
- ♦ **Delete** - To delete a Scheduled Meeting (you cannot delete your Instant Meeting), right-click the scheduled meeting, and then select the *Delete* menu item (also available as a menu item under *Meetings*).
- ♦ **Refresh** - To get an up-to-date meeting list, select the *Meetings > Refresh* menu item. This checks the server for any meeting changes on your list.
- ♦ **Join by Meeting ID or PIN** - To join a meeting using your Meeting ID or PIN, select the *Meetings > Join by Meeting ID or PIN* menu item. If you do not have a Meeting PIN (which you receive in your e-mail or IM invitation), you can use the Meeting ID.




Use the Meeting PIN to join meetings whenever possible so that the meeting server can identify you. You need to use the Meeting PIN to join any meeting where you plan to act as a moderator. If you join a meeting via phone using the Meeting ID, your name is listed as *anonymous* in the Meeting window.

2.2.4 Contacts and Buddies Definitions

The following are definitions for Contact and Buddy lists:

- ♦ **Contact**: Anyone who appears in one of your Contact Windows is a contact. Each Contact has information that you use to set up meetings or make phone calls.
 - ♦ A Community Contact is any contact that is visible in the Community Address Book.

Your administrator determines whether you have the right to view the Community Address Book or whether you must use *Search* to locate contacts.

- ♦ A Community Contact is available to the entire community and is a Registered User (Community User) or just a Contact.
- ♦ Use Manage Contacts and Buddies to identify Contacts and Community Users.
- ♦ A Contact has a Rolodex* card icon , and a Registered User has a light gray computer icon .
- ♦ If a Registered User is also a Personal Buddy, the computer icon is dark gray .
- ♦ You can modify your community contact information by configuring your personal contact information.
- ♦ Only administrators can create and modify community contacts.
- ♦ *Registered Users*: Registered Users are contacts who have a registered screen name in your community or in another community. You can make a Registered User a Personal Buddy and view his or her presence information.
- ♦ *Community Users*: Registered Users in the Community Address Book are Community Users. You can add Community Users to your personal buddy list and view their presence information.
- ♦ *Personal Contacts*: Personal Contacts are contacts that are available in your Personal Address Book and are visible only to you. A Personal Contact can be either a contact or a contact that is also a Registered User. Personal Contacts show up in the Manage Contacts and Users window in the *All* group indented beneath the Personal Address Book.
- ♦ *Personal Buddies*: You can only add registered users to your personal Buddies group, which is listed under your Personal Address Book in the Manage Contacts and Users window. Making a Registered User a Personal Buddy allows you to view his or her presence information.
- ♦ *Groups*: You can use different groups to organize your contacts:
 - ♦ *Community*: The Community Address Book by default contains one group (All) that contains all contacts and users in your community.
 - ♦ *Personal*: These are your Personal contacts, consisting of two groups (All and Buddies):
 - ♦ *All*: This group contains all users and contacts that exist in your Personal Address Book.
 - ♦ *Buddies*: This group contains just those registered users you add as Personal Buddies. When you add users as Personal Buddies, they still show up in the All group.
 - ♦ *Community Search Results*: Adds a group for each search you perform on the Community Address Book.

2.2.5 Communities

A community is a group of users, usually within the same company. All contact information for community members automatically shows up in the Community Address Book in your Manage Contacts and Users windows.

Contacts within a community are not automatically your buddies and therefore do not automatically broadcast presence. You must make a contact a Personal Buddy in order to view presence for that contact.

NOTE: A contact must be a Registered User to be added as a personal buddy.


The Community Address Book by default contains one group (*All*) that contains all contacts and users in your community. If a community administrator has created any other groups, they are also visible. If a user or contact belongs to a specific group under the Community Address Book (for example, co-workers), they are still visible in the All group.

NOTE: Your administrator determines whether you have the right to view the Community Address Book. Preventing the download of this Address Book can enhance performance for users in very large organizations.

2.2.6 Presence

Presence is information that is distributed to other users indicating if you are available. The most common example is Instant Messaging (IM) presence or computer presence. When you are actively using your computer, the IM system can send out information to let others know that you are at your computer. This information is typically conveyed via an icon next to your name. The icon would indicate if you are online, offline, or busy.

Computer Presence


Conferencing collects computer presence from the IM system and displays it in a computer-shaped IM icon next to each contact. If you are getting presence for a contact from the IM or Conferencing system for a particular contact, the icon is green ()

There are three distinct presence states (OFFLINE, AWAY, and AVAILABLE):


- ♦ If a contact is signed on and available in the IM system, he or she appears as AVAILABLE.
- ♦ If a contact is signed off in the IM system, he or she appears as OFFLINE.
- ♦ If a contact is set to AWAY in the IM system, he or she appears as AWAY.

NOTE: When a buddy is away, busy, or idle, you see a yellow notepad on top of the green computer icon (busy, away, idle). A dark gray computer icon indicates that you are not getting presence from the IM system for that contact. A light gray computer icon indicates that the contact is not a personal buddy (you only receive presence information for your Personal Buddies).

Meeting Presence

In the Meeting window, if the presence icon next to a contact is green () , the contact is in the meeting. If the icon is gray (light or dark) the contact is not in the meeting.

Phone Presence

In the Meeting window, if the middle icon is green () , the contact is on the phone in a meeting. If the icon is gray (light or dark) the contact is not on the phone in the meeting.

The phone icon has the following additional states:

- ♦ To indicate that the contact is dialing a “!” precedes the phone icon.
- ♦ A red line through the phone icon indicates that the contact has muted the phone.

- ♦ A white “talk bubble” displaying instead of the green phone indicates the meeting participant is actively speaking.

NOTE: In the Meeting window, you see phone presence for all meeting participants. In the Manage Contacts and Users window, you only see phone presence for a Personal Buddy.

Enabling Presence

You must make a contact who is a Registered User a Personal Buddy in order to see any presence from the Conferencing system.

2.2.7 Meeting Roles

- ♦ “Participant” on page 32
- ♦ “Host” on page 32
- ♦ “Moderator” on page 32
- ♦ “Persistent Moderators” on page 32
- ♦ “Temporary Moderators” on page 33
- ♦ “Administrator” on page 33
- ♦ “Presenter” on page 33
- ♦ “Remote Control Privilege (Remote Controller)” on page 33

Participant

Any person participating within a meeting.

Host

The user who creates a meeting.

Moderator

- ♦ A moderator is a participant who can control all aspects of a meeting.
- ♦ The host can make any meeting participant a moderator on a persistent or temporary basis.
- ♦ You can view a moderator’s status in brackets, [*Moderator*], following the participant’s name in the Meeting window.

NOTE: An administrator can join any meeting and always has persistent moderator privileges.

Persistent Moderators

- ♦ To make a participant a persistent moderator, assign them moderator privileges to the participant in the Meeting Setup window when you schedule the meeting. You can also edit the meeting, but you must save your changes before starting the meeting.
- ♦ You can temporarily remove a participant’s moderator privilege during any meeting.
- ♦ A persistent moderator for a scheduled meeting can start the meeting from the Main window. The host does not need to be present.

- ♦ A persistent moderator for a scheduled meeting cannot edit the scheduled meeting.

Temporary Moderators

You can assign a temporary moderator when starting a meeting or during a meeting. The next time the meeting is run, the temporary moderator privilege does not persist.


Administrator

- ♦ An administrator can join any meeting and always has persistent moderator privileges.
- ♦ Administrators can add, edit, and delete users from the Managing Contacts and Users window.
- ♦ Administrators can view the list of meetings and join any public, private, or unlisted meeting.
- ♦ To prevent an administrator from attending a specific meeting you must lock the meeting.

Presenter

- ♦ The participant who currently has the ability to share data is the presenter.

Administrators determine who has the right to share various types of data (Documents, the Whiteboard, Applications, etc.).

- ♦ The presenter is the only participant to have the *Sharing Options* available ()
- ♦ The text *[Presenter]* displays next to the presenter's name in the *Meeting* window.
- ♦ You can only assign one presenter at any given moment.

Remote Control Privilege (Remote Controller)

- ♦ Grants a participant the ability to control the presenter's computer share session from a remote mouse and keyboard.
- ♦ You can grant multiple users Remote Control Privileges.

Administrators determine who has the right to control a presenter's desktop or application.

- ♦ After a participant is granted control, he or she needs to click on their screen to begin controlling the presenter's share session.
- ♦ The presenter always has Control privileges.
- ♦ A round cursor indicates the remote controller's cursor. The presenter's cursor follows the remote cursor as it moves.
- ♦ The presenter must be careful to minimize all non-shared windows when allowing remote controllers, because a remote controller might click or type in a window that he or she cannot see.

Conferencing attempts to minimize all non-shared windows when a remote controller clicks them, but cannot minimize windows with open dialogs or certain specialized windows. If this occurs, the window in question flashes in the notification area at the bottom of the desktop.

- ♦ The text *[Remote Ctrl]* displays next to the remote controller's name in the Meeting window.

2.2.8 Phone Keypad User Interface

The following table describes features of the phone keypad user interface.

Table 2-1 Phone Keypad User Interface Features

Voice Feature	Keypad Sequence	Description
Volume Control	**8	**8 Increases the Volume, **8 decreases the Volume. The volume toggles between normal, mid-range, and loudest.
Lock	**4, **5	**4 locks the conference, **5 unlocks the conference.
Roll Call	**9	**9 activates Roll Call.
Mute/Un-mute	**6, **7	**6 mutes the line, **7 un-mutes the line.
Entry/Exit Tones	**3	**3 toggles Entry/Exit tones.
Dial Out / 1-1 Call	**1	<p>**1 for dial-out. Enter digits followed by the # key.</p> <p>* cancels digit entry and returns you to the conference.</p> <p>Once in a dial-out, you can use **11 to merge the dialed-out sub-meeting into the main meeting and use **12 to terminate the called party and join the main meeting.</p>
Call Recording	**2	Dial **2 to start recording, or **2 to stop recording.
Extended Menu	**#	**# activates the extended menu. The menu has options for lecture mode, hand up/hand down, and end meeting.
Hand Up/Down	**#4	**#4 toggles hand up and down.
Lecture Mode	**#5	**#5 toggles lecture mode on and off.
End Meeting	**#8	**#8 ends the meeting.
Exit Menu Mode	* (again)	If you press ** or **#, the system waits for a command. The system might ask you for a menu choice. Pressing * returns you to the conference.
Help for Basic Menu	**0	**0 lists all of the menu options for the basic menu.
Help for Extended Menu	**#0	**#0 lists all of the menu options for the extended menu.

NOTE: None of these options make persistent changes to the meeting. To make persistent changes, you must edit the meeting in the Meeting Setup window.

2.3 Configuring Your Contacts and Buddies

This section contains the following topics:

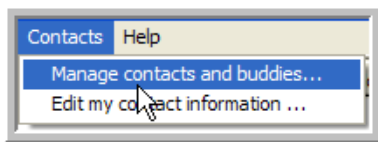
- ♦ Section 2.3.1, “Adding and Removing Buddies,” on page 35
- ♦ Section 2.3.2, “Searching the Community Address Book,” on page 37
- ♦ Section 2.3.3, “Managing Contacts and Buddies,” on page 38
- ♦ Section 2.3.4, “Managing Address Book Groups,” on page 40
- ♦ Section 2.3.5, “Editing a Contact’s Information,” on page 41

2.3.1 Adding and Removing Buddies

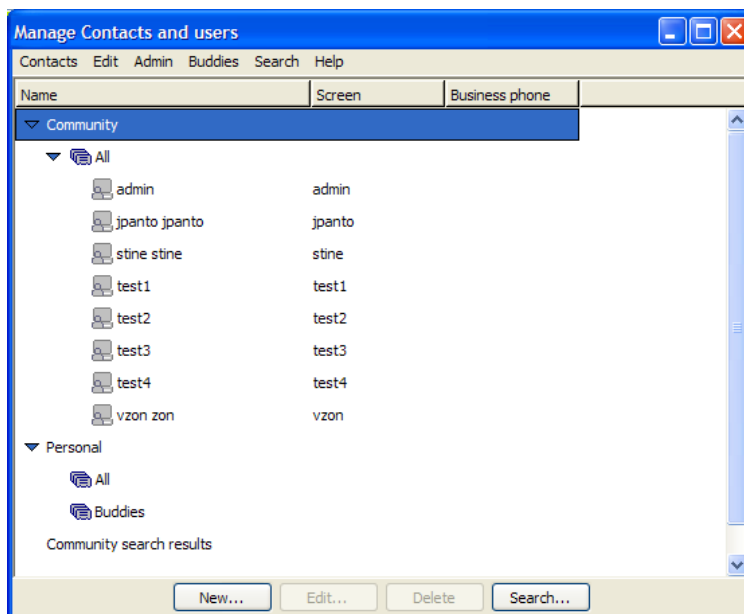
- ♦ “To add a Registered User from your community to your Personal Buddy list:” on page 35
- ♦ “Adding a Non-Community User to Your Personal Buddy List” on page 36
- ♦ “To Remove a Contact From Your Personal Buddy List:” on page 36

To add a Registered User from your community to your Personal Buddy list:

- 1 Select the *Contacts > Manage Contacts and Buddies* menu item.

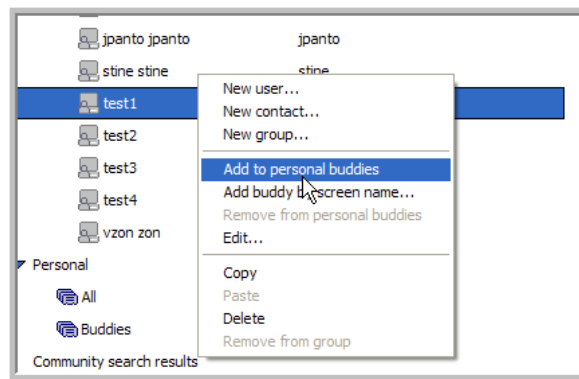


- 2 Select one or more contacts from any group under the Community Address Book in the Contact Window (use the Ctrl or Shift key to select multiple contacts).



If you do not see the Community Address Book, your administrator did not give you permission to view it. Instead, use Search to locate potential buddies.

- 3 Right-click one of the selected contacts and select the *Add to Personal Buddies* menu item.

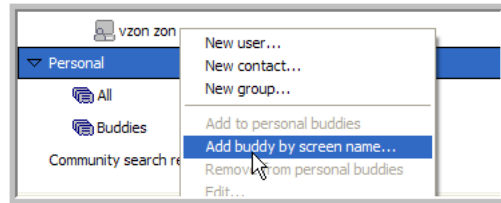


You can view all your Personal Buddies under the Personal Address Book. You can only have a limited number of Personal Buddies. The number is controlled by your personal policy setting. To find the maximum number of Personal Buddies you can add consult your system administrator or service provider.

Adding a Non-Community User to Your Personal Buddy List

To add a Registered User that is not a member of your community to your Personal Buddy list:

- 1 Select the *Contacts > Manage Contacts and Buddies* menu item.
- 2 Right-click the *Personal Address Book* and select the *Add Buddy By Screen Name* menu item.

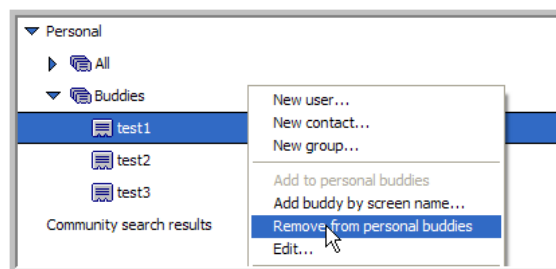


- 3 Type the contacts screen name into the dialog, then click *OK*.

You can use this same technique to add a Community Address Book contact to your Personal Buddy List.

To Remove a Contact From Your Personal Buddy List:

- 1 Find the buddy you want to remove under your Personal Buddy List.
- 2 Right-click the buddy and select the *Remove From Personal Buddies* menu item.



2.3.2 Searching the Community Address Book

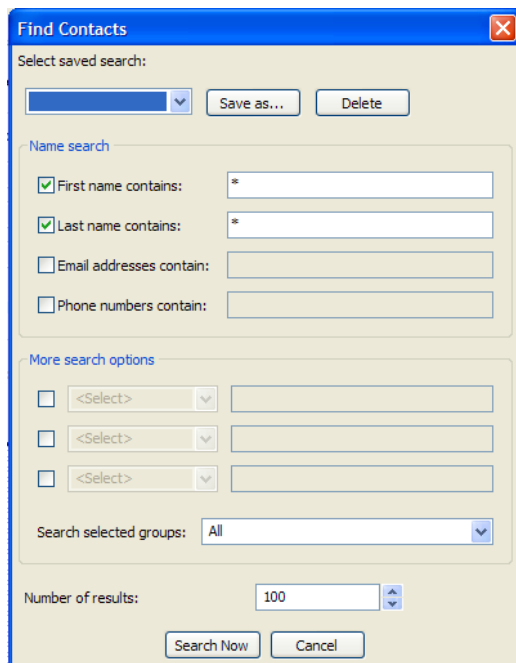
Conferencing allows you to search the Community Address Book for contacts. This feature is particularly helpful when your organization is large (which results in a large Community Address Book) or when your administrator has set a policy that prohibits the downloading of the Community Address Book.

- ♦ “To Search the Community Address Book For a Name:” on page 37
- ♦ “To Delete a Search Results Group:” on page 38
- ♦ “To Edit a Search Results Group:” on page 38
- ♦ “Additional Search Options” on page 38

To Search the Community Address Book For a Name:

- 1 Select the *Contacts > Manage Contacts and Buddies* menu item.
- 2 At the bottom of the *Contact* window, click *Search*

The Find Contacts window appears.



- 3 In either the *First Name Contains* or *Last Name Contains* fields, type a few characters of the contact’s first or last name depending on which field you use.

Use the asterisk (*) as a wildcard before or after the text string.

For example, if you type *da** into the *First Name Contains* field, Conferencing returns contact listings for names like David and Darren. If you type **da*, Conferencing returns contact listings for names like Brenda and Linda.

- 4 Deselect the name field you are not using.

Using both name fields does not narrow your search down (each search option you use finds the matching contacts for that option and adds them to the final search results. See “Additional Search Options” below.

5 Click *Search Now*.

Under the Community Search Results Address Book, Conferencing adds a group for this search containing the contacts that match your search criteria.

If the entire search criteria does not display in the group's name, mouse over the group name and a pop-up displays the entire search criteria.

To Delete a Search Results Group:

Right-click a search results group and select the *Remove Search* menu item.

To Edit a Search Results Group:

- 1** Right-click a search results group and select the *Edit Search Criteria* menu item.
- 2** Make your changes to the search criteria in the *Find Contacts* window, then click *Search Now*.

Additional Search Options

Conferencing returns the contacts that match any of the search options you use.

The Find Contacts window includes the following search options. Use the asterisk (*) as a wild card for all options:

- ♦ **Email addresses contain:** Enter a few characters of an e-mail address.
- ♦ **Phone numbers contain:** Enter a few characters of a phone number.
- ♦ **More search options:**
 1. Select one of the *More search options* sections.
 2. In the *Select* field, select the contact information field you want to use. For more information, see [“Editing a Contact’s Information” on page 41](#).
 3. Type a few characters of the contact information you are using.
 4. Deselect any search options you are not using.
 5. Click *Search Now*.
- ♦ **Search Selected Groups:** Use this option to search a specific address book. All is the default value.
- ♦ **Number of results:** Use this option to specify the number of contacts to display under the search results group for this search. To display additional contacts for the group, right-click the group and select the *Find more* menu item.

2.3.3 Managing Contacts and Buddies

Before you begin configuring contact and buddy lists, you might want to become familiar with the types of contacts. For more information, see [“Contacts and Buddies Definitions” on page 29](#).

To open the *Manage Contacts* window, select the *Contacts > Manage Contacts and Buddies* menu item.


- ♦ [“What Can You Manage?” on page 39](#)
- ♦ [“To Add a Personal Buddy From the Community Address Book:” on page 39](#)
- ♦ [“To Add a Personal Buddy by Name:” on page 39](#)

- ♦ “To Add a Contact to the Community Address Book (Administrator Only):” on page 39
- ♦ “To Add a Contact to Your Personal Address Book:” on page 39
- ♦ “To Copy Contacts:” on page 40
- ♦ “To Delete Contacts:” on page 40

What Can You Manage?

- ♦ You can only add or edit contacts in your Personal Address Book.
- ♦ Only administrators can add and edit contacts in the Community Address Book.
- ♦ You can create new groups under you Personal Address Book. For more information, see “Managing Address Book Groups” on page 40.

To Add a Personal Buddy From the Community Address Book:

- 1 Select one or more registered users (designated by the computer icon ).

You cannot add non-registered contacts (designated by the Rolodex icon ) as Personal Buddies.

If your Community Address Book is not visible in your Contacts window, your administrator has not given you the rights to download this address book. Use the *Search* tool, instead.

- 2 Select the *Buddies > Add to Personal Buddies* menu item.

The registered users you select are added to your *Buddies* group.

If you try to add a non-registered contact, he or she is not added to your *Buddies* group.

To Add a Personal Buddy by Name:

- 1 Select the *Buddies > Add Buddy by Screen Name* menu item.

- 2 Type in the screen name and click *OK*.

Your new personal buddy appears in your *Buddies* group under the *Personal* Address Book.

To Add a Contact to the Community Address Book (Administrator Only):

- 1 Select the Community Address Book, or a group under it.

If you select the Community Address Group, the contact goes into the *All* group, otherwise the contact goes into the group you select.

If your Community Address Book is not visible in your Contacts window, your administrator has not given you the rights to download this address book. Use the *Search* tool, instead.

- 2 Click *New* and select the *New Contact* menu item.

- 3 In the contact information window that appears, fill out the contact’s information, then click *OK*.

For information on field definitions, see “Editing a Contact’s Information” on page 41.

To Add a Contact to Your Personal Address Book:

- 1 Select the Personal address book or any group beneath it (with the exception of the group marked Buddies).

If you select the *Personal Address Group*, the contact goes into the *All* group; otherwise, the contact goes into the group you select.

- 2 Click *New* and select the *New Contact* menu item.
- 3 In the contact information window that appears, fill out the contact's information, then click *OK*.

For information on field definitions, see [“Editing a Contact’s Information” on page 41](#).

To Copy Contacts:

- 1 Select one or more contacts from any group.
- 2 Select the *Edit > Copy* menu item.
- 3 Select the group into which you want to copy the contacts.
- 4 Select the *Edit > Paste* menu item.

Only administrators can make changes to the Community Address Book.

To Delete Contacts:

- 1 Select one or more contacts.
- 2 Click *Delete*.
- 3 In the confirmation dialog that appears, click *Yes* to delete the contacts.

2.3.4 Managing Address Book Groups

To open the *Manage Contacts* window, select the *Contacts > Manage Contacts and Buddies* menu item.

To add a group to your Personal Address Book:

- 1 Select the Personal Address Book.
- 2 Click *New* and select the *New Group* menu item.
- 3 When the new screen appears, type the group name and click *OK*.

To add a group to the Community Address Book (administrators only):

- 1 Select the Community Address Book.
- 2 Click *New* and select the *New Group* menu item.
- 3 When the new screen appears, type the group name, then click *OK*.

To delete a group:

- 1 Select the group you want to delete.
- 2 Click *Delete*.
- 3 In the confirmation dialog box that appears, click *Yes* to delete the group.

Only administrators can add or delete groups in the Community Address Book.

2.3.5 Editing a Contact's Information

It is a good idea to edit your contacts' information and add any additional information you want to save.

- ♦ “To Edit Contact Information:” on page 41
- ♦ “Read-Only Fields” on page 42
- ♦ “Informational Fields” on page 42
- ♦ “Admin Only Fields” on page 43

To Edit Contact Information:

- 1 Select the *Contacts > Manage Contact and Buddies* menu item.
- 2 In the Manage Contacts window, select the contact you want to edit.
- 3 Click *Edit*.

The Edit User window appears.

Address book:	Community Address Book
Group:	My contacts and buddies
Screen name:	user
Password:	*****
Administrator:	No
Policy:	
Title:	writer
First name:	userfirst
Middle name:	
Last name:	userlast
Suffix:	
Company:	mycompany
Job title:	writer
Address 1:	
Address 2:	
City:	
State:	
Country:	
Postal code:	
Email 1:	me@mycompany.com
Email 2:	
Email 3:	
Business phone:	123-123-1234
Home phone:	
Mobile phone:	
Other phone:	
AIM screen:	
Yahoo screen:	
Messenger screen:	
User 1:	
User 2:	

OK Cancel Help

- 4 Edit the contacts information. See “Informational Fields” on page 42.
- 5 Click *OK*.

Read-Only Fields

The following fields present information about your configuration. You cannot modify these fields.

- ♦ **Address Book (Read only):** Lets you know whether your administrative policy allows you to use the Community Address Book, which is your global company-wide book.
- ♦ **Group (Read only):** Lists the group for this contact.

Informational Fields

The following fields allow you to enter information about your contact. It is not necessary to complete each field:

- ♦ **Title:** Use this field to set up a salutation title, such as Mr., Ms., or Dr.
- ♦ **First Name:** Contact's first name.
- ♦ **Middle Name:** Contact's middle name.
- ♦ **Last Name:** Contact's last name.
- ♦ **Suffix:** Use this field to identify a suffix, such as PhD, MD, Sr., or III.
- ♦ **Company:** Contact's company name.
- ♦ **Job Title:** A job title or job description.
- ♦ **Address1:** A field used to identify an address.
- ♦ **Address2:** A field used to identify an address.
- ♦ **State:** Contact's state.
- ♦ **Country:** Contact's country.
- ♦ **Postal Code:** Contact's postal or ZIP code.
- ♦ **Business Phone:** Contact's business phone number.
- ♦ **Home Phone:** Contact's home phone number.
- ♦ **Mobile Phone:** Contact's mobile or cell phone number.
- ♦ **Other Phone:** Use this field to enter another phone number, such as a pager or second mobile phone number.
See [“Using Correct Phone Number Formatting” on page 16](#) for information on entering phone numbers.
- ♦ **Extension:** If your contact's company uses telephone extensions, enter the contact's extension. This extension is not used when dialing their business phone number.
- ♦ **Email:** Contact's primary e-mail address.
- ♦ **Email2:** Contact's secondary e-mail address.
- ♦ **Email3:** An additional e-mail address.
- ♦ **User1:** Field that is available to store additional information.
- ♦ **User2:** Field that is available to store additional information.

Admin Only Fields

The following fields are available only to the Administrator:

- ♦ **Screen Name:** Name of user. This is the name used to sign on to the system. The Screen Name is case sensitive, cannot contain any spaces, and must be alphanumeric.
- ♦ **Password:** Password of the user.
- ♦ **Administrator:** Use Yes or No to indicate whether the user is an administrator.
- ♦ **Policy:** Settings and limits assigned to a user.

To see which settings are affected, see [“Administration Policies” on page 79](#).

Working with Meetings

3

Meetings are methods of connecting with other people. You can create meetings with any number of contacts, groups, or companies.

The following sections describe how to work with meetings:

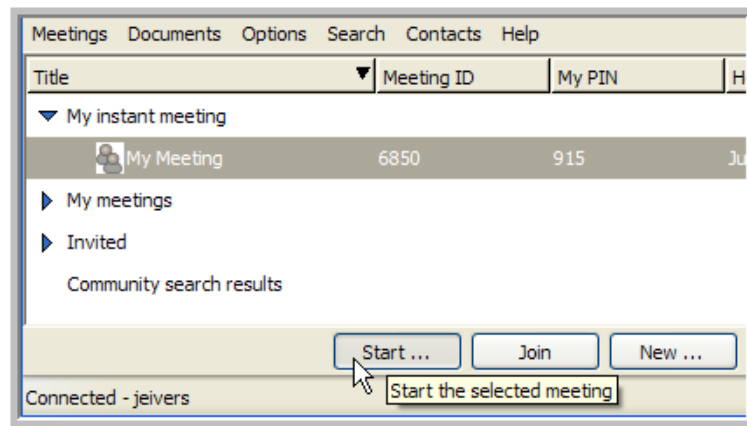
- ♦ [Section 3.1, “Running and Editing Your Instant Meeting,” on page 45](#)
- ♦ [Section 3.2, “Running and Editing a Scheduled Meeting,” on page 47](#)
- ♦ [Section 3.3, “Adding and Removing Meeting Invitees,” on page 49](#)
- ♦ [Section 3.4, “Editing the Meeting Options,” on page 51](#)
- ♦ [Section 3.5, “Joining a Scheduled Meeting,” on page 56](#)
- ♦ [Section 3.6, “Finding a Community Meeting,” on page 57](#)
- ♦ [Section 3.7, “Viewing Meeting Details,” on page 59](#)
- ♦ [Section 3.8, “Making Phone Calls,” on page 61](#)
- ♦ [Section 3.9, “Using the PC Phone Feature,” on page 62](#)
- ♦ [Section 3.10, “E-Mail and IM Invitations,” on page 63](#)
- ♦ [Section 3.11, “Meeting Window,” on page 64](#)
- ♦ [Section 3.12, “Meeting Window Menus,” on page 64](#)
- ♦ [Section 3.13, “Right-Click Menu Items,” on page 69](#)
- ♦ [Section 3.14, “Meeting Option Controls,” on page 71](#)
- ♦ [Section 3.15, “Sub-Meetings,” on page 71](#)
- ♦ [Section 3.16, “Meeting Chat,” on page 72](#)
- ♦ [Section 3.17, “Meeting Summary Tab,” on page 73](#)
- ♦ [Section 3.18, “Meeting Application Share Tab,” on page 73](#)
- ♦ [Section 3.19, “Meeting Whiteboard Tab,” on page 75](#)

3.1 Running and Editing Your Instant Meeting

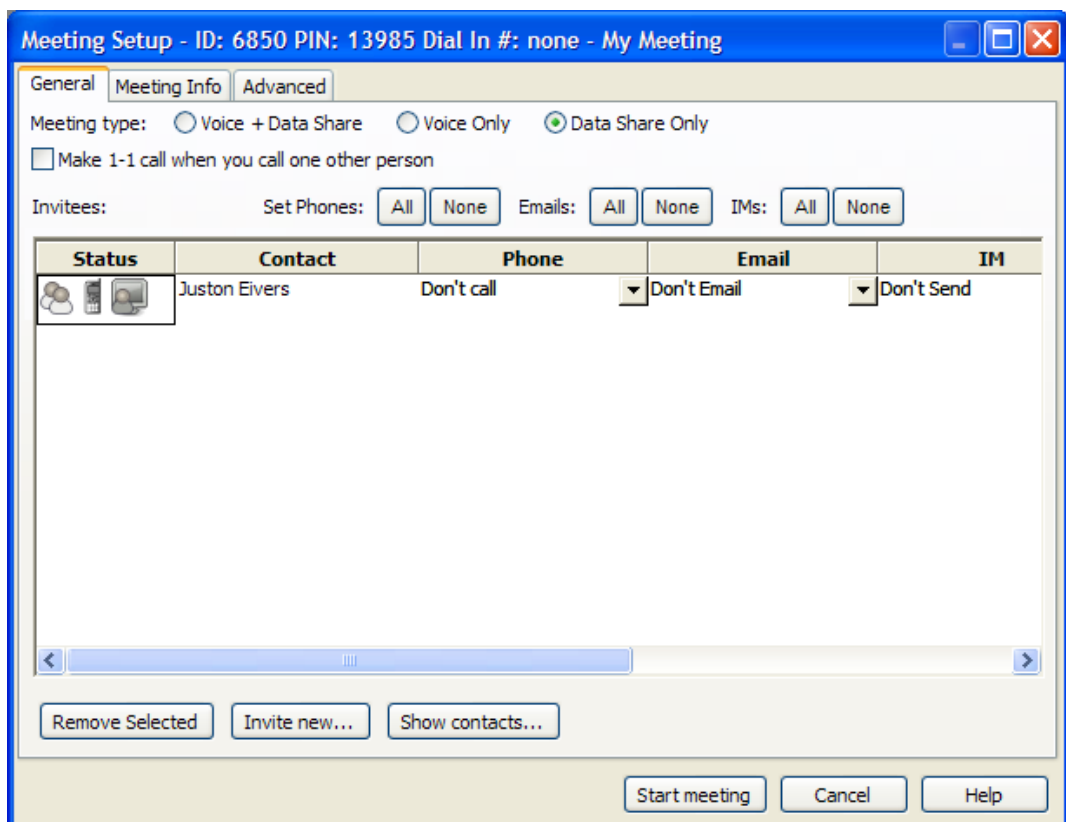
Your Instant Meeting is a meeting that has no predefined participants or scheduled starting time. You start your Instant Meeting at the time you want to hold the meeting. An Instant Meeting can involve a phone call, conference, calls, chat, and sharing data. You can create a Scheduled Meeting and omit the start time to reproduce the functionality of an Instant Meeting.

To start an Instant Meeting:

- 1 In the meeting list, select *My Meeting* under *My Instant Meeting*.
- 2 Click *Start*.



The Meeting Setup window appears.



- 3 Add your contacts. For more information, see [“Adding and Removing Meeting Invitees”](#) on page 49.
- 4 Configure the meeting options. For more information, see [“Editing the Meeting Options”](#) on page 51.
- 5 Click *Start Meeting*.

To edit your Instant Meeting settings:

- 1 In the meeting list, select *My Meeting* under *My Instant Meeting*.

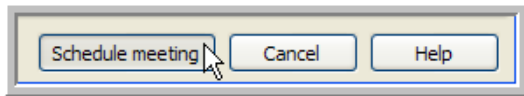
- 2 Click *Edit*.

The Meeting Setup window appears.

- 3 Configure the meeting options. For more information, see [“Editing the Meeting Options” on page 51](#).

Because this is your instant meeting, you should not unselect the *No Specific Meeting Time* option under the *Meeting Info* tab.

- 4 Click *Schedule Meeting*.



- 5 In the Meeting Confirmation dialog that appears, click *OK*.

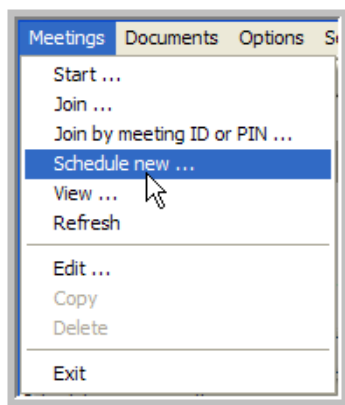
3.2 Running and Editing a Scheduled Meeting

A Scheduled Meeting is a meeting that can have predefined participants and an optional scheduled starting time. If you create a Scheduled Meeting with a schedule time, the time is placed in e-mail invitations that go out to meeting participants. You can start a Scheduled Meeting at any time, regardless of the time it is scheduled. A Scheduled Meeting can involve a phone call conference, calls, chat, and sharing data.

NOTE: If you make an invitee a moderator to a Scheduled Meeting, the invitee becomes a persistent moderator who can start, but not edit, your Scheduled Meetings. For more information, see [“Meeting Roles” on page 32](#).

To create a new Scheduled Meeting:

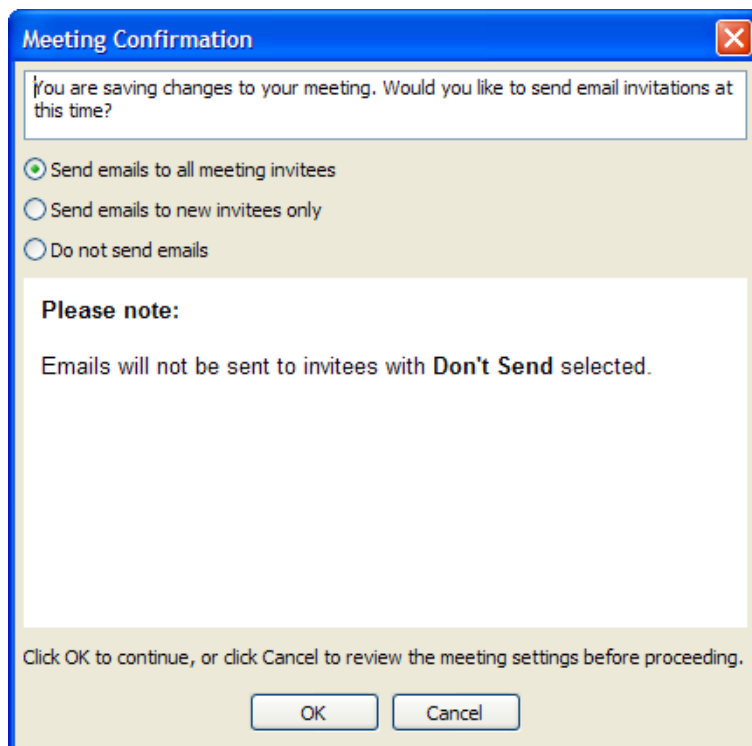
- 1 Click *Schedule New*.



The Meeting Setup window appears. The Meeting ID and Meeting PIN remain blank until the meeting is scheduled.

- 2 Add your contacts. For more information, see [“Adding and Removing Meeting Invitees” on page 49](#).
- 3 Configure the meeting options. For more information, see [“Editing the Meeting Options” on page 51](#).

- 4 Click *Schedule Meeting*.
- 5 If you selected e-mail notifications, a dialog appears for pre-sending meeting invitations:



- ♦ Select *Send Emails to All Meeting Invitees* to send invitations to everyone invited, even if they have previously received e-mail invitations.
- ♦ Select *Send Emails to New Invitees Only* to only send invitations to invitees you just added.

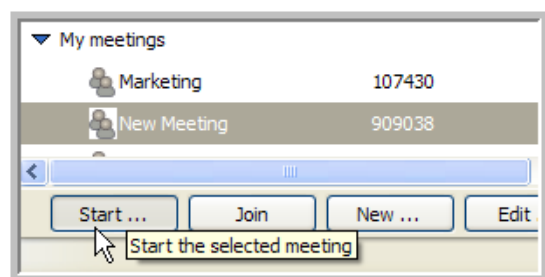
NOTE: With a new meeting, all invitees are new, so invitations go to everyone.

- ♦ Select *Do Not Send Emails* if you do not want any e-mail notifications sent.

Click *OK*.

To Start a Scheduled Meeting:

- 1 Select one of your Scheduled Meetings or a meeting where you are a designated moderator (look for the *Yes* in the Moderator column).
- 2 Click *Start*.



The *Meeting Setup* window appears.

- 3 Add any additional contacts you want to invite to the meeting. See [“Adding and Removing Meeting Invitees” on page 49](#).
- 4 If necessary, edit the meeting options. See [Section 3.4, “Editing the Meeting Options,” on page 51](#).
- 5 Click *Start Meeting* at the bottom of the window.

To Edit Settings for a Scheduled Meeting:

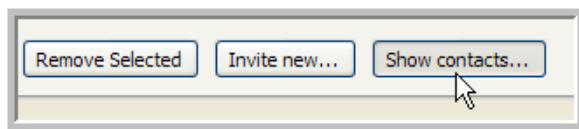
- 1 Select one of your Scheduled Meetings.
- 2 Click *Edit* to bring up the Meeting Setup window.
- 3 Edit your contacts. See [“Adding and Removing Meeting Invitees” on page 49](#).
- 4 Edit the meeting options. See [Section 3.4, “Editing the Meeting Options,” on page 51](#).
- 5 Click *Schedule Meeting*.

3.3 Adding and Removing Meeting Invitees

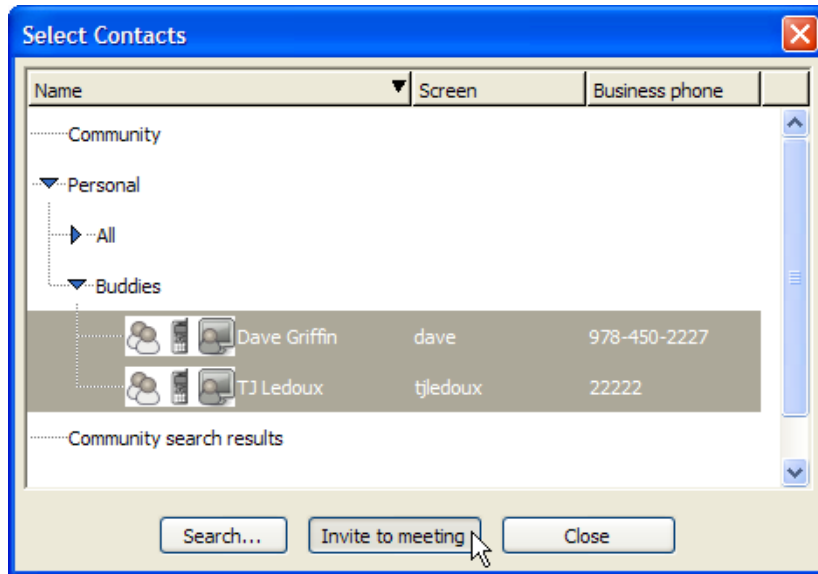
To add contacts to a meeting, you must open the Select Contacts window from the Meeting Setup window and add all the contacts and groups you want to invite to the meeting. You can also add someone who is not a contact from the Meeting Setup window.

To invite contacts or groups to a meeting:

- 1 From the Meeting Setup window, select *Show Contacts*.



- 2 In the Select Contacts window, select the contacts and groups you want to invite to your meeting. Use the Ctrl and Shift keys to select multiple contacts and groups.

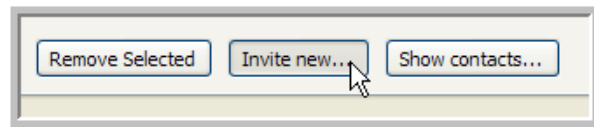


3 Click *Invite to Meeting*.

The *Select Contacts* window closes and the contacts and groups you selected appear in the *Invitees* list of the *Meeting Setup* window.

To invite someone who is not a contact:

1 From the Meeting Setup window, select *Invite New*.



A Meeting Setup contact window appears.

2 Fill out the new contact's *Name*, *Email*, and *Phone* information.

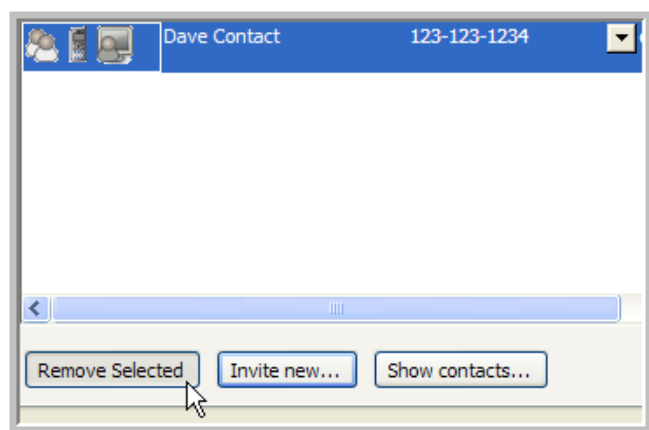
3 Click *OK*.

The contact information window closes and the new contact appears in the *Invitees* list of the Meeting Setup window.

To remove an invitee or group from your meeting:

- 1 In the Meeting Setup window, select the invitees and groups you want to remove from the *Invitees* list (use the Ctrl or Shift keys to select multiple invitees and groups).
- 2 Click *Remove Selected*.

The invitees and groups you selected are removed from the meeting.



3.4 Editing the Meeting Options

Meeting Options can be set in the Meeting Setup window when starting or editing a meeting, or to modify a running meeting.

NOTE: If you change meeting options when starting a meeting or for a running meeting, the new settings are only in effect for that specific meeting. When you run the meeting again, it reverts back to the last settings you saved for the meeting.

There are three tabs in the Meeting Setup window:

- ♦ **General Meeting Options:** Set the meeting type, phone, e-mail, IM, and moderator options in this tab. See [“General Meeting Options” on page 51](#).
- ♦ **Meeting Info Options:** Set the meeting title, description, invitation message, and meeting time in this tab. See [“Meeting Info Options” on page 53](#).
- ♦ **Advanced Meeting Options:** Set the meeting privacy, password, advanced meeting options, display, and chat settings in this tab. See [“Advanced Meeting Options” on page 54](#).

3.4.1 General Meeting Options

The following options are available on the *General* tab of the Meeting Setup window:

Figure 3-1 General Meeting Options Tab

Status	Contact	Phone	Email	IM
	Juston Eivers	Don't call	Don't Email	Don't Send

- ♦ **Meeting Type:** This option lets the invitees know in their e-mail or IM invitation what type of meeting it is. Regardless of the setting, any meeting can share voice and data if necessary.

There are three meeting types:

- ♦ Voice & Data Share
- ♦ Voice Only
- ♦ Data Share Only
- ♦ **Make 1-to-1 Calls When You Call One Other Person:** When you select this option and call one other person, your phones are directly connected in a private sub-meeting. See [“Making Phone Calls” on page 61](#) for more information.

NOTE: 1-to-1 calls do not dial extensions.

Consider the following when you select this option:

- ♦ If you are calling no other people, you are placed in a private sub-meeting by yourself.
- ♦ If you call two or more people, a conference call is placed to all parties who are not currently on the phone.

NOTE: When you do not select this option, all calls are conference calls.

- ♦ **Set Phones:** There are two *Set Phones* options (buttons):
 - ♦ **All:** Click *All* to call all invitees when the meeting starts.
 - ♦ **None:** Click *None* to place no calls when the meeting starts.

These options override the current values in the *Phone* column for all invitees. You can select each invitee's phone number individually by using this field, or select the *Enter Phone #* option to manually type in a number.

NOTE: The Follow Me Phone Number is only available to Personal Buddies. As soon as a Personal Buddy's Follow Me Phone Number changes, it immediately becomes available to you. You need to restart the client to get any updated numbers for registered users who are not Personal Buddies.

- ♦ **Emails:** There are two e-mail options (buttons):
 - ♦ **All:** Click *All* to send all invitees e-mail invitations when you schedule or start the meeting.
 - ♦ **None:** Click *None* to send no e-mail invitations.

These options override the current values in the *Email* column for all invitees. You can select each invitee's e-mail address individually by using this field, or select the *Enter Email* option to manually type in an e-mail address. The e-mail invitation the invitees receive contains a link to the meeting.

- ♦ **IMs:** There are two IM options (buttons):

- ♦ **All:** Click *All* to send all invitees IM invitations when you start the meeting.
- ♦ **None:** Click *None* to send no IM invitations.

These options override the current values in the *IM* column for all invitees. If the invitee is a Conferencing user and is online at the time the invitation is sent, the invitee receives a pop-up invitation with a link to the meeting.

NOTE: If you are invited to two or more meetings via IM invitations before responding, you only see the last invitation. To join an ongoing meeting from a previous invitation, go to your Meeting List window and find the desired meeting.

- ♦ **Moderator (check box on the column):** Select this option to configure an invitee as a moderator. After a meeting commences, the moderator privilege can be granted or revoked by using the *Participants* menu items.

NOTE: The host of the meeting always enters the meeting with the moderator privilege regardless of how the check box is set in the meeting setup window.

3.4.2 Meeting Info Options

The following options are available from the *Meeting Info* tab:

Figure 3-2 Meeting Info Options Tab

The screenshot shows a dialog box titled "Meeting Info Options Tab" with three tabs: "General", "Meeting Info" (which is selected and highlighted in orange), and "Advanced". The "Meeting Info" tab contains the following fields:

- Title:** A text box containing "My Meeting".
- Meeting Time:** A section with a checkbox labeled "No specific meeting time" (which is unchecked). Below it are two rows of date and time pickers:
 - Start time:** Date "9/ 4/2007" and time "15:00".
 - End time:** Date "9/ 4/2007" and time "17:00".
- Description:** A large text area for a detailed description of the meeting.
- Invitation message:** A large text area for an additional text description that is part of the invitation.

At the bottom right of the dialog box are three buttons: "Start meeting", "Cancel", and "Help".

- ♦ **Title:** The meeting title is included in IM and e-mail meeting invitations and is displayed in the Meeting List window. If it is a public meeting, you might want to include your name as part of the meeting title so others know you are the host.
- ♦ **Description:** A detailed description of the meeting. The description is included in IM and e-mail meeting invitations.
- ♦ **Message to Include with Invitations:** An additional text description that is part of the invitation. It does not show up in the meeting list.

NOTE: If you intend to send IM invitations, it is best to keep the content of the text in title, description, and message short because IM systems limit message size.

- ♦ **Meeting Time:** You can select the *NO Specific Meeting Time* option to configure the meeting as a floating meeting for you and the invitees or you can select a *Start Time* and *End Time* for the meeting.

3.4.3 Advanced Meeting Options

The following options are available on the *Advanced* tab:

Figure 3-3 *Advanced Options Tab*

The screenshot shows a window with three tabs: 'General', 'Meeting Info', and 'Advanced'. The 'Advanced' tab is selected. It contains several settings:

- Meeting Privacy:** Three radio buttons: 'Private' (unselected), 'Unlisted' (selected), and 'Public' (unselected).
- Meeting password (blank for none):** A text input field.
- Display attendees to non-moderators:** Three radio buttons: 'No attendees displayed' (unselected), 'Moderators only' (unselected), and 'All attendees' (selected).
- Meeting Options:** A list of checkboxes:
 - ☐ Meeting can continue without host or moderator
 - ☐ Moderators may edit meeting
 - ☐ Record name for roll call
 - ☐ Enable lecture mode (non-moderators are muted)
 - ☐ Recording starts when meeting starts
 - ☐ PINs for instant invitees are only valid while meeting is in progress
- Chat for non-moderators:** Three radio buttons: 'None' (unselected), 'Chat to moderators only' (unselected), and 'Chat to all attendees' (selected).
- PINs for instant meetings expire:** A spinner box set to '48' followed by 'hours after meeting end'.

♦ **Meeting Privacy:** You have three options for privacy settings:

- ♦ **Private:** Private meetings do not show up in meeting lists (unless you are an invitee or it is your own private meeting) and you cannot join anonymously (that is with a Meeting ID). You must use a valid Meeting PIN (found in your e-mail or IM invitation) to join a private meeting.
- ♦ **Public:** Anyone can join a public meeting. Public meetings show up in the meeting list for all users in your community.

NOTE: If the administrator disables the display of these meetings, use the *Search* tool to view public meetings. See “[Administration Policies](#)” on page 79 for more information.

- ♦ **Unlisted:** Anyone can attend unlisted meetings, but you must know the Meeting ID in order to join the meeting. Administrators can see all unlisted meetings in their *Meeting List* window.

NOTE: Unlisted is often the best choice for an Instant Meeting. It allows you to give the Meeting ID to people, but the meeting never appears in a user’s meeting list unless you invite the user.

- ♦ **Meeting Password Required:** Adds an additional layer of security. When you use a meeting password, all invitees must know the password to get into the meeting. The number of digits is defined by policy. The moderator or meeting owner can view the password in the *Meeting Options* window.
- ♦ **Meeting Options:** You have six meeting options:
 - ♦ **Meeting Can Continue Without Moderator:** Select this option to allow a meeting to remain in progress when no moderator is present. If this option is not selected, the meeting immediately ends when the last moderator leaves the meeting.
 - ♦ **Moderators May Edit Meeting:** Select this option to allow moderators to edit the options for a meeting after it has started.

- ♦ **Record Name For Roll Call:** Select this option to prompt each invitee for their name as they join the meeting. Each invitee's name is announced as they join and when they leave the meeting.
- ♦ **Enable Lecture Mode (Non-moderators are muted):** Select this option to run a meeting as a lecture. Only moderators are active participants while this option is set.
- ♦ **Enable Meeting Recording:** Select this option to enable the recording of this meeting.
- ♦ **PINs For Instant Invitees are Only Valid While Meeting is in Progress:** Select this option so that any invitations you send during the meeting are only valid for the current meeting. If you end the meeting and then restart it, invitations for the earlier session of the meeting are no longer valid. This does not effect invitations to users who are persistent invitees of Scheduled Meetings.

When you do not select this option, you can set an expiration time for instant invitees during which they can join any session of the meeting. For example, if you set an expiration time of 24 hours, instant invitees can join the meeting any time within that 24 hour window no matter how many times you start and stop the meeting. An expiration time of 0 hours is equivalent to invitations being valid only for the duration of the current meeting.

- ♦ **Display Attendees to Non-moderators:** There are three display options available:
 - ♦ **No Attendees Displayed:** Do not show attendee names in the Meeting window to non-moderators.
 - ♦ **Moderators Only:** Show only the names of moderators in the meeting to non-moderators.
 - ♦ **All Attendees:** Show all attendee names to non-moderators.

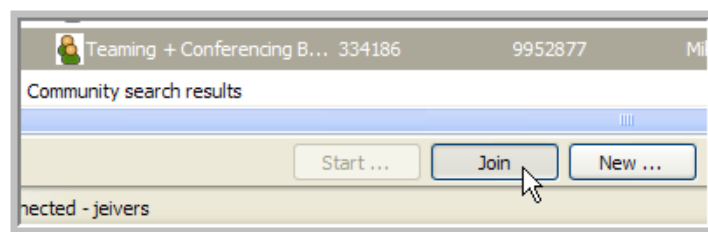
NOTE: All attendee names are always shown to moderators, independent of this setting.

- ♦ **Chat For Non-moderators:** There are three chat options:
 - ♦ **None:** Do not allow any chat for non-moderators.
 - ♦ **Chat to Moderators Only:** Only allow participants to chat with moderators.
 - ♦ **Chat to All Attendees:** Allow any participant to send a chat message to any other participant.

3.5 Joining a Scheduled Meeting

To join a meeting:

- 1 Select the meeting you want to join.
- 2 Click *Join*.

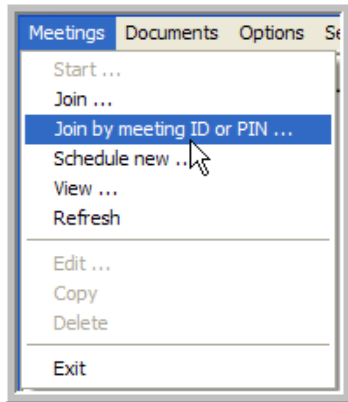


You are brought into the meeting.

If there is no host or moderator present in the meeting, a dialog appears, informing you that you need to wait for a host or moderator to join the meeting.

To join a meeting by Meeting ID or PIN:

- 1 Select the *Meetings > Join by Meeting ID or PIN* menu item.

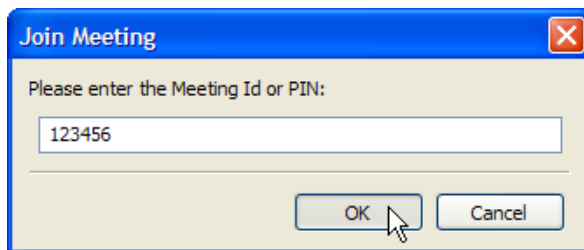


The Join Meeting dialog appears.

- 2 Type the Meeting ID or PIN number into the field in the *Join Meeting* dialog.

Use the Meeting PIN to join meetings whenever possible so that the meeting server can identify you. You need to use the Meeting PIN to join any meeting where you plan to act as a moderator. For more information see [“Meeting PINs and Meeting IDs” on page 27](#).

- 3 Click *OK*.



You are brought into the meeting.

If there is no host or moderator present in the meeting, a dialog appears, informing you that you need to wait for a host or moderator to join the meeting.

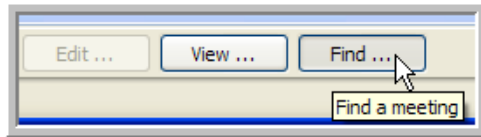
3.6 Finding a Community Meeting

Conferencing allows you to search the *Community Meetings* group. This tool is particularly helpful when your organization conducts many meetings or if your administrator disables the display of public meetings.

NOTE: You can save any search you run and use it later.

To search the Community Meetings:

- 1 Click *Find* at the bottom of the Meetings List window.



The Meeting Search window appears.

- 2 To save the search, click *Save As*, type a name for your search, then click *OK*.
Saved searches appear in the *Search Name* drop-down list.
- 3 Select a Date Range:
 - ♦ Select the *Scheduled Within* option (default) to search within a given number of days in the past or future:
 1. In the first drop-down list, select *Next* to search future meetings or select *Last* to search past meetings.
 2. In the second field, specify the number of days within which to search.
 - ♦ Select the *Scheduled Between* option to search between two specific dates:
 1. In the first field, specify the start date for your search.
 2. In the second field, specify the stop date for your search.
 - ♦ Select the *Search All Dates* option to search through all meetings.

- 4 Select the *Search Criteria* for your search (you can select multiple options to narrow your search down):
 - ♦ To search the meeting titles for specific text, select the *Meeting Title Contains* option and type the text you are searching for into the corresponding field.
 - ♦ To search the meetings based on the host's first name, select the *Host's First Name Contains* option and type the first name into the corresponding field.
 - ♦ To search the meetings based on the host's last name, select the *Host's Last Name Contains* option and type the last name into the corresponding field.
 - ♦ To search for a specific meeting ID, select the *Meeting ID* option and type the Meeting ID into the corresponding field.
 - ♦ To limit your search to meetings that are in progress, select the *Only Show Meetings That Are in Progress* option.
- 5 To configure the number of results you want to retrieve for this search, type a number into the *Number of Results* field (the default is 100).
- 6 Click *Search Now*.

The results for the search are displayed in a group under *Community Search Results*. If there are additional search results beyond the limit you specified, right-click the search results group and select the *Find More* menu item.

To delete Search Results:

Right-click the search group you want to delete, then select the *Remove Search* menu item.

To edit a Search Result Group:

Right-click the search group you want to edit, then select the *Edit Search Criteria* menu item. The Meeting Search window appears with that search's configuration.

To Run a Saved Search:

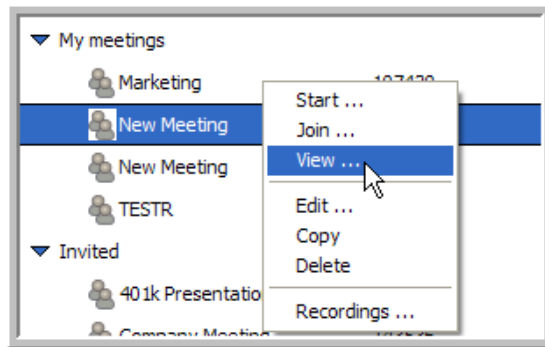
- 1 Click *Find* at the bottom of the Meetings List window.

The Meeting Search window appears.
- 2 Select the saved search you want to run from the *Search Name* drop-down list.
- 3 Make any configuration changes you want.
- 4 Click *Search Now*.

3.7 Viewing Meeting Details

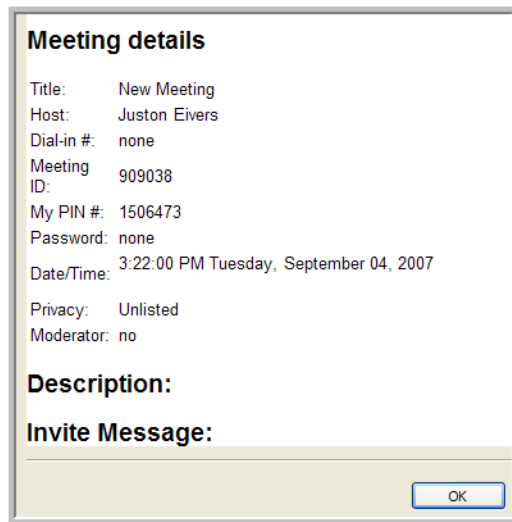
To view details for a specific meeting, right-click the meeting, then select the *View* menu item.

Figure 3-4 Meeting Right-Click Menu



The Meeting Information window appears.

Figure 3-5 Meeting Information Window



This window contains the following information:

- ♦ **Meeting Details:** This includes the following:
 - ♦ Meeting title
 - ♦ Host name
 - ♦ Dial-in #
 - ♦ Meeting ID
 - ♦ PIN #
 - ♦ Password
 - ♦ Meeting Date/Time
 - ♦ Privacy
 - ♦ Your Moderator Status
- ♦ **Description:** The meeting description. See “Meeting Info Options” on page 53.
- ♦ **Invite Message:** The invitation message. See “Meeting Info Options” on page 53.

3.8 Making Phone Calls

Make phone calls by starting a Voice Only meeting with the invitees you want to call. You can also call a predefined list of people in a Scheduled Meeting by starting the Scheduled Meeting as a Voice Only meeting. After you have made calls, you can always send invitations to have your callers join a data meeting.

- ♦ [Section 3.8.1, “Call Types,” on page 61](#)
- ♦ [Section 3.8.2, “Moving to a Conference Call From a 1-to-1 Call,” on page 61](#)
- ♦ [Section 3.8.3, “To Call a Meeting Member from the Meeting Window \(1-to-1 call\):,” on page 61](#)
- ♦ [Section 3.8.4, “To Conference Multiple Parties in an Instant Meeting:,” on page 62](#)

3.8.1 Call Types

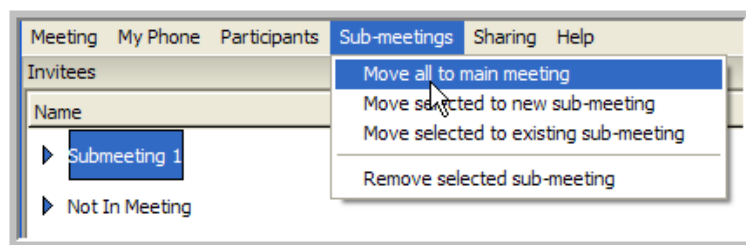
There are two types of calls that you can make:

- ♦ **1-to-1 Call:** A two-party direct call between you and one other person. Both phones are dialed up and connected by the Voice Server. 1-to-1 calls place you in a private sub-meeting. See [“General Meeting Options” on page 51](#) for more information.
- ♦ **Conference Call:** A voice-only meeting with three or more people connected by the Voice Server. The Voice Server asks each person to “press 1 to join the meeting.” See [“General Meeting Options” on page 51](#) for more information.

3.8.2 Moving to a Conference Call From a 1-to-1 Call

This means you moving from a Sub-meeting to the Main meeting.

From the Meeting Window, select the *Sub-meeting > Move All to Main Meeting* menu item. All users are moved into the *Main Meeting* group.

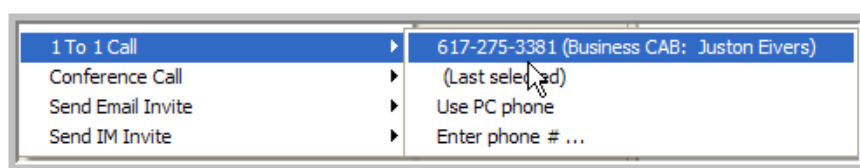


3.8.3 To Call a Meeting Member from the Meeting Window (1-to-1 call):

- 1 Right-click a participant in the Meeting Window.
- 2 Select *1-to-1 Call*.
- 3 Select or enter a phone number to call the participant.

A 1-to-1 call is made between the selected phone number and your Follow Me phone number. You are placed in a private sub-meeting inside the Meeting Window. If you are already on the

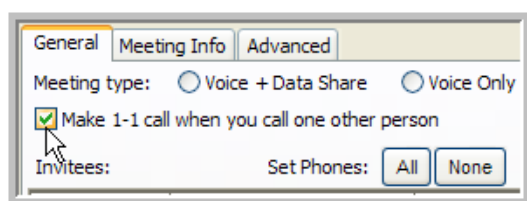
phone and in a meeting, you are not re-called, but you are connected to the outbound invitee call.



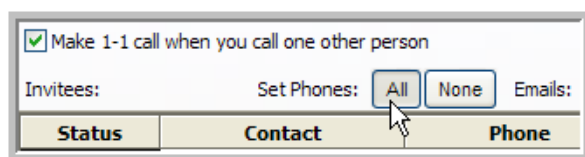
After you are connected to the Voice Server (whether it called you, or you called in) you can make as many calls as you want without hanging up by using 1-to-1 calls from the Meeting Window. Caller privileges for calls made via the menu are taken from the settings stored in your Instant Meeting.

3.8.4 To Conference Multiple Parties in an Instant Meeting:

- 1 Start your instant meeting. The meeting setup dialog appears.
- 2 Invite the people you want to have a conference call with. See [“Adding and Removing Meeting Invitees” on page 49](#).
- 3 If you have only two invitees and want to make a 1-to-1 call, select the *Make 1-to-1 Call When You Call One Other Person* option; otherwise, you connect via a conference call. Calls with three or more invitees are always conference calls, regardless of this option.



- 4 Next to *Set Phones*, click *All* to call the invitees’ default phone numbers. Double-check these numbers and make sure they are set correctly. See [“Editing the Meeting Options” on page 51](#) for more information.



- 5 Click *Start Meeting*.
You can call all of the parties in a Scheduled Meeting by selecting a conference call from the *Start Scheduled* button or the *Meeting List* Window and following the steps in this section for configuring the Meeting Setup.

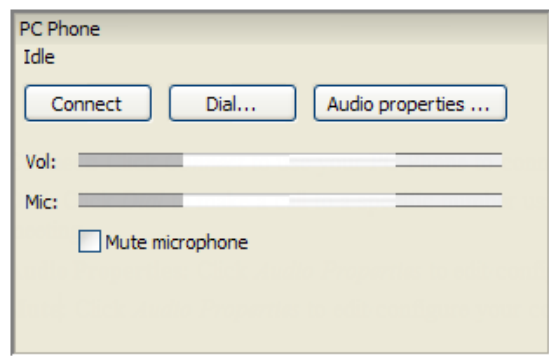
3.9 Using the PC Phone Feature

This pane is only displayed when connected to a server with voice support enabled.

If you experience audio problems on Linux, trying adjusting the audio levels and enabled devices. If this does not work, try switching from the OSS to the ALSA sound system; this selection is available from the **PC Phone tab** in the *Preferences* dialog (*Options > Preferences*).

There are three functional buttons and a *Mute microphone* option for the *PC Phone* pane in your *Meeting* window:

Figure 3-6 *PC Phone Pane*



- ♦ **Connect:** Click *Connect* to use your PC Phone to connect to the meeting.
- ♦ **Dial:** Click *Dial* to make a call to a specific number using your PC Phone while you are in a meeting.
- ♦ **Audio Properties:** Click *Audio Properties* to edit/configure your computer's audio properties.
- ♦ **Mute microphone:** Select this option to mute your microphone locally. This is similar to using the Mute button on your phone. It does not affect the mute setting on the Conferencing bridge and meeting participants cannot see that you are muted.

3.10 E-Mail and IM Invitations

E-mail and IM Invitations can be sent out when meetings are scheduled and when meetings are started. The invitations contain a clickable link. When an invitee click on the link, they are brought directly into the meeting (assuming the meeting is already started).

Meeting invitations can be configured under the *Meeting Info* tab in the Meeting Setup window.

About the Meeting Invitation Link

The link is for a Web page that displays details about the meeting, including the invitee's meeting PIN, the meeting title, and description. The Web page also brings the invitee directly into the meeting as follows:

- ♦ If you are a Registered User already running the client and signed on, the Meeting Window opens.
- ♦ If you are a Registered User, but are not running the client, the Sign On window opens. After you sign on, the Meeting Window opens.
- ♦ If you are not a Registered User, you are signed on as a non-registered user and brought into the Meeting Window after providing Sign On information.

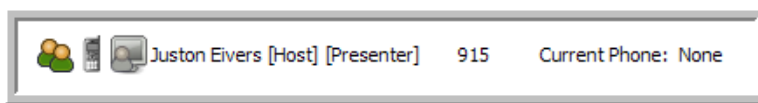
NOTE: If the invitee does not have Conferencing installed, then the Web page brought up by the link installs Conferencing (Microsoft Internet Explorer running ActiveX only). Clicking on the link connects you to the meeting. The meeting must be started by either a host or moderator before you are brought to the Meeting Window.

Invitation Expiration Times

Meeting invitations are only valid for certain time periods depending on how the meeting settings are configured by the host. See [“Editing the Meeting Options” on page 51](#) for details.

3.11 Meeting Window

Figure 3-7 Meeting Participant



Participants inside the Meeting Window are shown with a number of attributes to the right of the participant name, including the following:

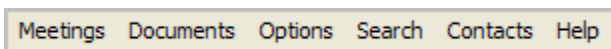
- ♦ Meeting PIN: Designated by *[123456]*. Meeting PINs are only visible to moderators. Participants are not able to view the host's PIN.
- ♦ Presenter status: *[Presenter]*.
- ♦ Remote control status: *[Remote Ctl]*.
- ♦ Moderator status: *[Moderator]*.
- ♦ Host status: *[Host]*.

See [“Meeting Roles” on page 32](#) for more information.

3.12 Meeting Window Menus

The following Meeting Window menus are available:

Figure 3-8 Meeting Window Menus

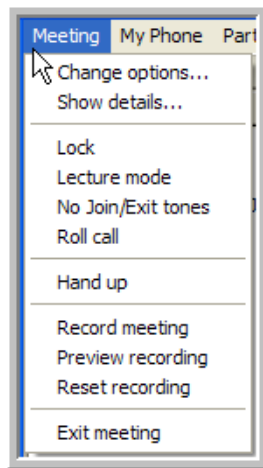


- ♦ [“Meeting Menu” on page 65](#)
- ♦ [“My Phone Menu” on page 66](#)
- ♦ [“Participants Menu \(Moderators only\)” on page 66](#)
- ♦ [“Sub-Meetings Menu \(Moderators only\)” on page 67](#)
- ♦ [“Sharing Menu \(Moderators only\)” on page 68](#)
- ♦ [“Help Menu” on page 69](#)

3.12.1 Meeting Menu

The Meeting menu in the Meeting Window offers options that affect or provide information about the whole meeting. Some menu items are only available to moderators. These options show up as dimmed under the Meeting menu if you are not a moderator or administrator.

Figure 3-9 Meeting Menu



- ♦ **Change Options (Moderators only):** Select this option to edit the *Meeting Info* and *Advanced meeting* options. See [“Editing the Meeting Options” on page 51](#) for details.
- ♦ **Show Details:** Select this option to view the Meeting Information window.
- ♦ **Lock (Moderators only):** Select this option to lock the meeting so that no new participants can join (a check mark appears to the left of the *Lock* menu item to indicate that the meeting is locked). Select the *Lock* menu item again to unlock the meeting (the check mark disappears).
- ♦ **Lecture Mode (Moderators only):** Select this option to mute all non-moderator (and host) participants and disable phone exit and entry announcements and tones (a check mark appears to the left of the *Lecture Mode* menu item to indicate that it is active). Select the *Lecture Mode* menu item again to deactivate this option (the check mark disappears).

In lecture mode, a moderator can un-mute any meeting participant. Large meetings can be conducted by turning lecture mode on, and setting the meeting options so that chat is limited to moderators only and participants are only displayed to the moderators. See [“Editing the Meeting Options” on page 51](#) for details.

- ♦ **No Join/Exit Tones (Moderators only):** Select this option to disable phone exit and entry announcements and tones (a check mark appears to the left of the *No Join/Exit Tones* menu item to indicate that it is active). Select the *No Join/Exit Tones* menu item again to deactivate this option (the check mark disappears).
- ♦ **Roll Call (Moderators only):** Select this option to play a list of the recorded names for all the participants via the phone. Each name is recorded when a participant joins a meeting if the *Record Name for Roll Call* option in your *Meeting Options* is set.
- ♦ **Hand Up:** Select this option to raise your hand in the meeting and let the moderator know that you have a question or comment. This option is very important in large meetings where participants might be muted and you can only speak when the moderator un-mutes you.
- ♦ **Record Meeting (Moderators only):** Select this option to take an audio recording of the conversation in the Main Meeting Group of the Meeting Window (a check mark appears to the

left of the *Record Meeting* menu item to indicate that it is recording). Select the *Record Meeting* menu item again to stop recording (the check mark disappears).

The *Record Meeting* feature does not record any conversation inside of sub-meetings with one exception: if the meeting was started with a 1-to-1 call so there is only *Submeeting1*, this sub-meeting is recorded until the moderator who initiated the recording is moved from the sub-meeting into the main meeting, at which time the main meeting is recorded. If a recording for a given meeting is stopped and started multiple times, each subsequent recording is appended to the previous recording.

- ♦ **Preview Recording (Moderators only):** Select this option to have a link to the recording e-mailed to you.
- ♦ **Reset Recording (Moderators only):** Select this option to erase any previous recordings for this meeting.
- ♦ **Exit Meeting:** Select this option to leave the meeting.

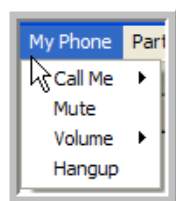
If you are a moderator and there are participants left in the meeting, the *Exit Meeting Options* dialog appears:

- ♦ Select the *End the Meeting Now* option to end the meeting for all participants immediately.
- ♦ Select the *Meeting Remains in Progress* option to allow the meeting to continue (if there are no moderators left in the meeting, select the *Allow Meeting to Continue Without Moderator* sub-option to allow the meeting to continue).

3.12.2 My Phone Menu

The *My Phone* menu items control your phone options.

Figure 3-10 *My Phone Menu*



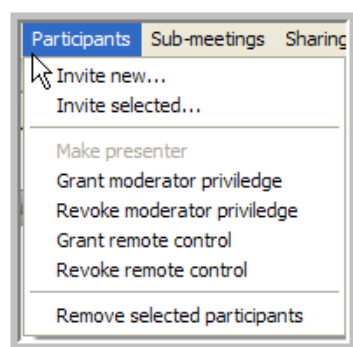
My Phone Menu Items:

- ♦ **Call Me:** Select this menu item to have the meeting server call your phone. Select the number you want the server to call from the drop-down list that appears, or select *Enter Phone #* to type in the number you want the server to call.
- ♦ **Mute:** Select this menu item to mute your phone.
- ♦ **Volume:** Select this menu item to change the volume on your phone.
- ♦ **Hangup:** Select this menu item to hang up your phone connection.
- ♦ **PC Phone:** Select this item to connect via a PC Phone.

3.12.3 Participants Menu (Moderators only)

The *Participants* menu items are only available to moderators.

Figure 3-11 *Participants Menu*



Moderators can use the following Participants menu items:

- ♦ **Invite New:** Select this menu item to invite a new participant to the meeting. The Meeting Setup Window opens.
- ♦ **Invite Selected:** Select one or more participants who have not yet joined the meeting, and then select this menu item to invite them to the meeting. The Meeting Setup Window opens.

NOTE: To invite everyone who has not yet joined the meeting, select the *Not in Meeting* group, and then use the *Invite Selected...* menu item.

- ♦ **Make Presenter:** Select a participant, and then select this menu item to make the participant a presenter. [*Presenter*] appears next to the participant's name. There can only be one presenter at a time.
- ♦ **Grant Moderator Privilege:** Select one or more participants, and then select this menu item to grant them moderator privileges for the current session of this meeting. [*Moderator*] appears next to the participant's name. See **"Meeting Roles"** on page 32 for details on the moderator role.
- ♦ **Revoke Moderator Privilege:** Select one or more participants who have moderator privileges, and then select this menu item to revoke their moderator privileges.
- ♦ **Grant Remote Control:** Select one or more participants, and then select this menu item to grant the participants remote control rights over your share session. [*Remote Ctl*] appears next to the participants' names.

NOTE: A participant clicks in the share window to take remote control of the share session. If you click your mouse or press a key on your keyboard, you automatically take back control of the share session.

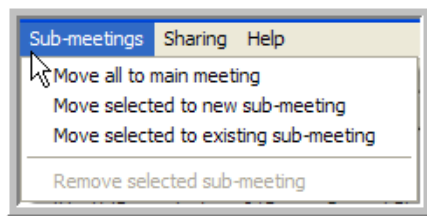
- ♦ **Revoke Remote Control:** Select one or more participants who have remote control, then select this menu item to revoke their remote control rights.
- ♦ **Remove Selected Participants:** Select one or more participants, then select this menu item to remove them from the meeting.

NOTE: Removed participants can rejoin meetings that are not locked or private.

3.12.4 Sub-Meetings Menu (Moderators only)

The *Sub-meetings* menu items are only available to moderators.

Figure 3-12 *Sub-Meetings Menu*



Moderators can use the following *Sub-meetings* menu items:

- ♦ **Move All to Main Meeting:** Select one or more sub-meetings, and then select this menu item to move all the participants in any selected sub-meetings into the *Main* meeting.

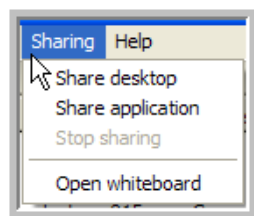
NOTE: If you use this menu item on a single participant in a sub-meeting, all the participants in that sub-meeting are moved into the *Main* meeting.

- ♦ **Move Selected to New Sub-meeting:** Select the participants for the new sub-meeting, and then select this menu item to move them into a new sub-meeting.
- ♦ **Move Selected to Existing Sub-meeting:** Select one or more participants, select this menu item, select a sub-meeting from the *Move Participant(s)* window that appears, and then click *OK* to move the selected participants to the existing sub-meeting.
- ♦ **Remove Selected Sub-meeting:** Select a sub-meeting, and then select this menu item. The sub-meeting is removed and all participants in that sub-meeting are moved into the *Main* meeting.

3.12.5 Sharing Menu (Moderators only)

The *Sharing* menu items are only available to moderators.

Figure 3-13 *Sharing Menu*



NOTE: The administrator might have assigned a policy that prohibits or limits the sharing of your desktop, applications, or data. Consult with your administrator for more information about policies and the features available to you within a meeting.

Moderators can use the following *Sharing* menu items:

- ♦ **Share Desktop:** Select this menu item to share your desktop with all the participants in the meeting.

Your desktop appears under the *Application Share* tab in each participant's Meeting Window.

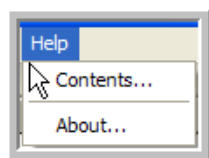
- ♦ **Share Application:** To use the Share Application:
 1. Select this menu item to share an application with all the participants in the meeting.
 2. In the *Share Applications* window that appears, select the application you want to share.
 3. Click *OK*.

The application you are sharing appears under the *Application Share* tab in each participant's Meeting Window.
- ♦ **Stop Sharing:** Select this menu item to end the share session, or click *Stop Sharing* in the Conferencing Toolbar.
- ♦ **Open Whiteboard:** Select this menu item to open a Whiteboard session where all the participants can work together on the whiteboard document at the same time.

3.12.6 Help Menu

Use the *Help* menu to access the Conferencing online help (*Contents* menu item) or to get information about the Conferencing version you are using (*About* menu item).

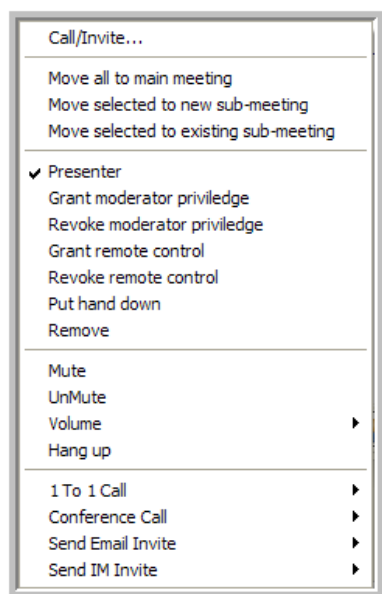
Figure 3-14 *Help Menu*



3.13 Right-Click Menu Items

The right-click menu items are only available to moderators. Activate this menu by right-clicking on a participant or meeting group.

Figure 3-15 *Participant Right-Click Menu*



The following options are available from this menu:

- ♦ **Call/Invite:** Select one or more participants who have not yet joined the meeting, then select this menu item to invite them to the meeting. The Meeting Setup Window opens.
- ♦ **Move All to Main Meeting:** Select one or more sub-meetings, then select this menu item to move all the participants in any selected sub-meetings into the *Main* meeting.

NOTE: If you use this menu item on a single participant in a sub-meeting, all the participants in that sub-meeting are moved into the *Main* meeting.

- ♦ **Move Selected to New Sub-meeting:** Select the participants for the new sub-meeting, then select this menu item to move them into a new sub-meeting.
- ♦ **Move Selected to Existing Sub-meeting:** Select one or more participants, select this menu item, select a sub-meeting from the *Move Participant(s)* window that appears, then click *OK* to move the selected participants to the existing sub-meeting.
- ♦ **Presenter:** Select a participant, and then select this menu item to make the participant a presenter. *[Presenter]* appears next to the participant's name. There can only be one presenter at a time.
- ♦ **Grant Moderator Privilege:** Select one or more participants, and then select this menu item to grant them moderator privileges for the current session of this meeting. *[Moderator]* appears next to the participant's name. See [“Meeting Roles” on page 32](#) for details on the moderator role.
- ♦ **Grant Moderator Privilege: Revoke Moderator Privilege**
Select one or more participants who have moderator privileges, and then select this menu item to revoke their moderator privileges.
- ♦ **Grant Remote Control:** Select one or more participants, and then select this menu item to grant the participants remote control rights over your share session. *[Remote Ctl]* appears next to the participants' names.

NOTE: A participant clicks in the share window to take remote control of the share session. If you click your mouse or press a key on your keyboard, you automatically take back control of the share session.

- ♦ **Revoke Remote Control:** Select one or more participants who have remote control, and then select this menu item to revoke their remote control rights.
- ♦ **Put Hand Down:** Select one or more participants who have their hands up, then select this menu item to remove their *Hand Up* indicators.
- ♦ **Remove:** Select one or more participants, then select this menu item to remove them from the meeting.






NOTE: A participant who is removed from a meeting can get back into the meeting, unless it is locked or private.

- ♦ **Mute:** Select one or more participants, then select this menu item to mute their phones.
- ♦ **UnMute:** Select one or more participants, then select this menu item to unmute their phones.
- ♦ **Volume:** Select a participant, then select this menu item to change the volume on the phone.
- ♦ **Hangup:** Select a participant, then select this menu item to hang up the phone connection.

- ♦ **1 to 1 Call:** Select a participant, then select this menu item to call one participant and initiate a private sub-meeting. See “[Making Phone Calls](#)” on page 61 for more information.
- ♦ **Conference Call:** Select a participant, and then select this menu item to initiate a conference call with the selected participant. See “[Making Phone Calls](#)” on page 61 for more information. The conference call does not automatically include you in the call. If you are already in a conference call, the selected participant is added.
Use the right-click *Call/Invite* menu item or the *Participants Option > Call* menu item to call multiple participants at the same time.
- ♦ **Send Email Invite:** Select a participant, then select this menu item to send the participant an e-mail invitation.
Use the right-click *Call/Invite* menu item to send an e-mail invitation to multiple participants at the same time.
- ♦ **Send IM Invite:** Select a participant, then select this menu item to send the participant an IM invitation.
Use the right-click *Call/Invite* menu item to send IM invitations to multiple participants at the same time.

3.14 Meeting Option Controls

At the bottom of the meeting list section in the Meeting Window there are the following *Option Control* buttons:

- ♦  Meeting Options: This contains the *Hand Up* and *Exit Meeting* menu items. See “[Meeting Window Menus](#)” on page 64 for details.
- ♦  My Phone Options: These are the same menu items as the *My Phone* menu.
- ♦  Sharing Options (Moderators only): These are the same menu items as the *Sharing* menu.
- ♦  Invite Options (Moderators only): This contains the *Invite New* and *Invite Selected* menu items. See *Participants* Menu for details.
- ♦  Participant Options (Moderators only): These menu items are the same menu items as the *Participants* Menu and the *My Phone* menu, with the addition of the *Put Hand Down* menu item, which moderators use to remove the *Hand Up* indicators for participants.

The phone options in this menu are for moderators to control the participants phone settings: for example, a moderator can call, mute, unmute, change the volume, or hang up on any participant.

3.15 Sub-Meetings

A meeting can have only one main meeting, but it can contain many sub-meetings. Sub-meetings are private voice meetings that occur within an ongoing meeting. Participants in a sub-meeting cannot hear what is happening in the main meeting, or in any other sub-meeting.

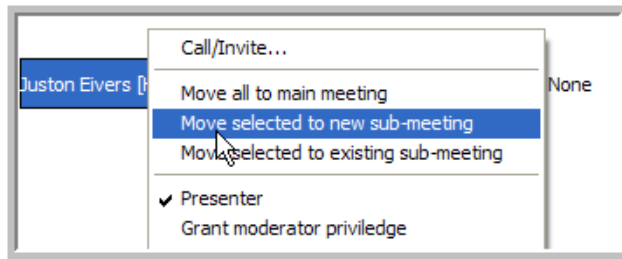
You can use the phone keypad in sub-meetings if you need to navigate through the options of an auto-attendant when making a 1-to-1 call to start a sub-meeting. Sub-meetings have no effect on in-meeting chat or data/application sharing participation. See “[Phone Keypad User Interface](#)” on page 33 for details on the phone keypad.

How to Start a Sub-Meeting

The most common way is to make a 1-to-1 call to another participant, which automatically puts you and the called party in a new sub-meeting.

Moderators can also right-click a participant (including themselves) and select the *Move Selected to New Sub-meeting* menu item.

Figure 3-16 Starting a Sub-Meeting Menu Item

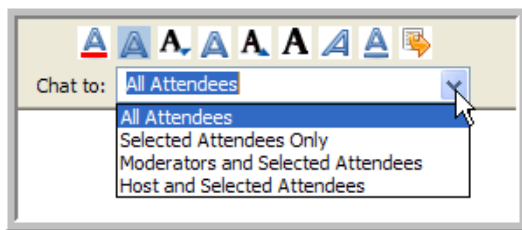


3.16 Meeting Chat

The chat section of the Meeting Window allows you to chat with one or more participants.

Use the *Chat To* drop-down list to select the participants you want to chat with:

Figure 3-17 Chat to Drop-down List








- ♦ All Attendees
- ♦ Selected Attendees Only
- ♦ Moderators and Selected Attendees
- ♦ Host and Selected Attendees

Type your text into the bottom section and press *Send* (📧) to send your message (or just press the Enter key on your keyboard).

All messages are displayed in the upper section.

The following chat tools are available:

- ♦  Set Foreground Color
- ♦  Set Background Color
- ♦  Decrease Font Size
- ♦  Set to Normal Font Size
- ♦  Increase font Size

- ♦ **A** Set to Bold
- ♦ *A* Set to Italics
- ♦ A Set to Underline
- ♦ 📧 Send

3.17 Meeting Summary Tab

The Meeting Summary tab contains the following information:

Figure 3-18 Meeting Summary Tab

Meeting Detail (English - US)	
Title:	My Meeting
Host:	Juston Eivers
Dial In #:	none
Meeting ID:	6850
My PIN#:	915
Password:	none
Date/Time:	Unspecified
Privacy:	Unlisted
Moderator:	no
Description:	
Invite Message:	

- ♦ **Meeting Details:** This includes the following:
 - ♦ Meeting title
 - ♦ Host name
 - ♦ Dial-in #
 - ♦ Meeting ID
 - ♦ PIN #
 - ♦ Password
 - ♦ Meeting Date/Time
 - ♦ Privacy
 - ♦ Your Moderator Status
- ♦ **Description:** The meeting description. See “[Meeting Info Options](#)” on page 53.
- ♦ **Invite Message:** The invitation message. See “[Meeting Info Options](#)” on page 53.

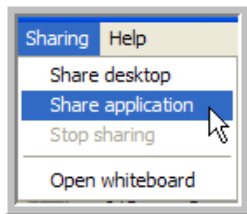
3.18 Meeting Application Share Tab

The Application Share Window is used when the desktop or an application is being shared. For a viewer (a meeting participant who is not presenting) the Share Session is displayed to the right of the Meeting Window.

NOTE: You can set the *Hide Presenter Meeting Window from Other Participants* setting under the *Data Share* tab of the Preferences Window so that participants can see your Meeting and Contacts windows.

To create a application or desktop share session, select the *Sharing > Share Desktop* or *Sharing > Share Application* menu item.

Figure 3-19 *Sharing Menu > Share application*



Information about Sharing Data

NOTE: Video and Flash are not supported for Application or Desktop sharing.

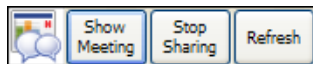
- ♦ You must be in an Instant or Scheduled Meeting and have access to the Meeting Window.
- ♦ You must also be the presenter. If you are a moderator you can make yourself the presenter (only one presenter is allowed at one time in a meeting).

NOTE: The administrator might have assigned a policy that prohibits or limits the sharing of your desktop, applications, or data. Consult with your administrator for more information about policies and the features available to you within a meeting.

- ♦ You can share either your entire computer desktop, or one or more specific applications.
- ♦ When you start sharing as a presenter, the Meeting Window is hidden and the Conferencing Toolbar appears, floating above the top-right corner of the desktop.
- ♦ The Conferencing Toolbar allows you to stop sharing (if you are the presenter) and view or hide the Meeting Window. You can also refresh the Share Window.
- ♦ Data sharing is automatically stopped when the meeting is ended.

When You Present a Share Session

- ♦ The Host is automatically the presenter when the meeting starts. Any participant can be made the presenter by a moderator. If you are made a presenter, a dialog is displayed notifying you that you are now the presenter.
- ♦ When you share data as a presenter, the Meeting Window is hidden and the Conferencing Toolbar displays the *View Meeting*, *Stop Sharing*, and *Refresh* buttons:



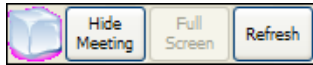
- ♦ Click *View Meeting* to display the Meeting Window. Select *Hide Meeting* to hide the Meeting Window again.
- ♦ Click *Stop Sharing* to end the share session.

- ♦ Click *Refresh* to refresh the share display for all participants. This might be necessary if participants encounter viewing problems because of an intermittent network connection.

When You View a Share Session

- ♦ Data sharing is started automatically when you are in a meeting and the presenter starts to share. When you are viewing a data share session, the Conferencing Toolbar appears in the top right corner of the desktop.
- ♦ You see either the presenter's desktop, or one or more applications (depending on what they are sharing).
- ♦ If the Share Session you are viewing is bigger than your desktop you can pan around the viewable area by putting your cursor near the edges of the display (the display pans automatically).
- ♦ At any time, you can expose the Meeting Window by grabbing and resizing the Meeting Window bar on the far-left side of your desktop.
- ♦ The Conferencing Toolbar has two available buttons: the *Hide Meeting* and the *Refresh* button.

Figure 3-20 Conferencing Toolbar



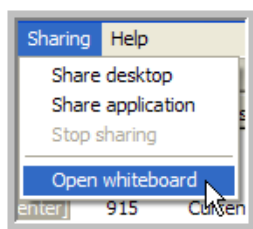
- ♦ Click *Hide Meeting* to hide the Meeting Window. Click *View > Meeting* to show the Meeting Window again.
- ♦ Click *Refresh* to refresh the share display. This might be necessary if you encounter viewing problems due to an intermittent network connection.

3.19 Meeting Whiteboard Tab

You can create a whiteboard session with other meeting participants. A whiteboard session allows you and the other meeting participants to draw or write on a white board while conducting the meeting.

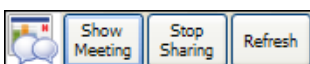
To create a whiteboard session, select the *Sharing > Open Whiteboard* menu item. The Whiteboard screen appears, indicating that you are sharing data with other members of the meeting.

Figure 3-21 Sharing Menu > Open Whiteboard



To end a whiteboard session, click *Stop Sharing* in the Conferencing Toolbar.

Figure 3-22 Conferencing Toolbar



The Whiteboard and the Shared Document can be edited with the following Whiteboard Toolbar icons:

Figure 3-23 *Toolbar Icons*




3.19.1 Document Options



Whiteboard documents are saved on the server and are only accessible from the meeting in which they were created.

Figure 3-24 *Toolbar Icons Document Options*



- ◆  **New Document:** Click to open a new document. You are prompted to save the current document. Click *Yes* to save the current document, *No* to open a new document without saving, or *Cancel* to continue working in the current document.

If you continue on to a new document, a *Notice* dialog appears. Type the name of your new document, and then click *OK*, or click *Cancel* to continue working in the current document.


- ◆  **Save Document:** Click to save the current document.
- ◆  **Upload Document:** Click to upload a saved document from the server.

3.19.2 Page Options


Your document can contain multiple pages of content.

Figure 3-25 *Toolbar Icons Page Options*



- ◆  **Organize Pages:** Click to organize the pages in the current document. You can use the *Move Up* and *Move Down* buttons to change the page order, the *Delete* button to remove pages, and the *Rename* button to give meaningful names to the various pages.

Click *OK* to save your changes, or *Cancel* to return to the current document without saving your changes.

- ◆  **Insert New Blank Page:** Click to insert a blank page in your document. The new blank page is the last page in your document and automatically opens.

- ♦ First Page: Click to go to the first page in your document.
- ♦ Previous Page: Click to go to the previous page in your document.
- ♦ Goto Page: Click to go to a specific page in your document. Select the page from the drop-down list that appears.
- ♦ Next Page: Click to go to the next page in your document.
- ♦ Last Page: Click to go to the last page in your document.

3.19.3 Editing Tools

Use these tools to edit the content of your document (see the Graphics and Text Tools as well).

Figure 3-26 *Toolbar Icons Editing Tools*



- ♦ Cut: Click to cut selected material from the current page in your document. This material is now in your clipboard.
- ♦ Copy: Click to copy selected material from the current page in your document. This material is now in your clipboard.
- ♦ Paste: Click to paste the material currently in your clipboard onto the current page in your document.
- ♦ Delete This Section: Click to delete selected material from the current page in your document (this material is now in your clipboard).
- ♦ Clear Current Page: Click to clear the current page of all content.
- ♦ Undo: Click to undo your last action.
- ♦ Redo: Click to redo your last action.















3.19.4 Graphics and Text Tools

Use these tools to create and edit graphics and text in your documents.

Figure 3-27 *Toolbar Icons Graphic and Text Options*



- ♦ Select Objects: Click to enable the pointer and select objects on the current page. This is the default tool.
- ♦ Draw a Straight Line: Click to draw a straight line.
- ♦ Draw a Line With an Arrowhead: Click to draw a line with an arrowhead.
- ♦ Scribble!!: Click to draw scribble a free-hand style line.

- ♦  Highlight: Click to highlight sections of your page.
- ♦  Draw a Rectangle: Click to add a rectangle to the current page.
- ♦  Draw an Ellipse: Click to add an ellipse to the current page.
- ♦  Draw a Textbox: Click to add a text box to the current page.
- ♦  Draw a Check Mark: Click to add a check mark to the current page.
- ♦  Line Thickness: Click to change the thickness of a line or border, becomes the default for the next object you draw.
- ♦  *Line Style*: Click to change the style of a line or border. The selection becomes the default for the next object you draw.
- ♦  Font Settings: Select to edit the font settings for a text box The selection becomes default for the next text box you add.
- ♦  Line or Border Color: Click to change the color of a line or border. The selection becomes the default for the next object you draw.
- ♦  Background Color: Click to change the background color of an object The selection becomes the default for the next object you draw.
- ♦  Text Color: Select to edit the font color for a text box. The selection becomes the default for the next text box you add).
- ♦  Bring to Front: Click to bring the selected content to the front of the current page. in front of any objects it overlaps with.
- ♦  Send to Back: Click to send the selected content to the back of the current page (behind any objects it overlaps with).
- ♦  Toggle Transparency: Click to toggle transparency off and on for the selected content. When transparency is on, you can see through the fill color of a transparent object.

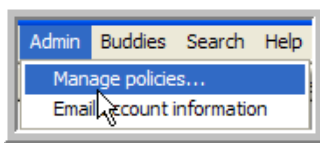
Administration Policies

4

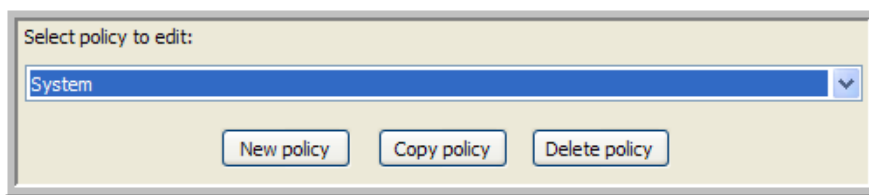
A policy is a set of privileges that governs the availability and limitations of certain features for a given user. Each user has a policy. Typically, an administrator creates a small number of policies, appropriate for different levels of users, and assigns a policy to each user. For more information about creating policies and applying them to new users, see the *Conferencing Operations Guide*.

To Manage Policies:

- 1 Select *Contacts > Manage Contacts and Buddies* to open the Manage Contacts and Users Window.
- 2 Select *Admin > Manage Policies* to open the Policy Manager Window.



- 3 An administrator can edit, copy, delete, and create policies:



To Edit a Policy:

1. Select the policy you want to edit from the *Select Policy to Edit* drop-down list.
2. Edit the policy settings.
3. Click *OK*.
4. In the confirmation dialog that appears, click *Yes* to save your changes to the policy, or click *No* to cancel your changes.

The Policy Manager Window closes.

To Copy a Policy:

1. Select the policy you want to copy from the *Select Policy to Edit* drop-down list.
2. Click *Copy Policy*.
3. Type a name for the new policy into the dialog that appears, then click *OK*

To Delete a Policy:

1. Select the policy you want to delete from the *Select Policy to Edit* drop-down list.
2. Click *Delete Policy*.
3. In the dialog that appears, click *Yes* to delete the policy, or click *No* to cancel.

To Create a New Policy:

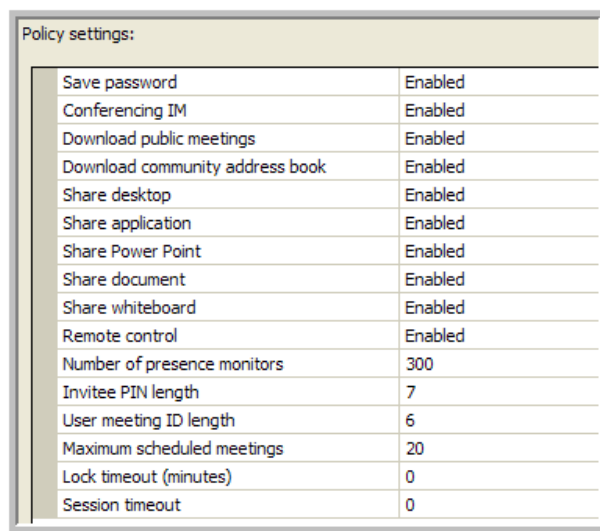
1. Click *New Policy*.
2. Type a name for the new policy into the dialog that appears, then click *OK*.

To Change a User's Policy:

- 1 Select the policy you want to apply to this user from the *Policy* drop-down list, and click *OK*.
- 2 The new policy for the user is in effect the next time that user signs on.

An administrator must edit a user's contact information from the Manage Contacts Window.

Figure 4-1 Policy Settings



Policy settings:	
Save password	Enabled
Conferencing IM	Enabled
Download public meetings	Enabled
Download community address book	Enabled
Share desktop	Enabled
Share application	Enabled
Share Power Point	Enabled
Share document	Enabled
Share whiteboard	Enabled
Remote control	Enabled
Number of presence monitors	300
Invitee PIN length	7
User meeting ID length	6
Maximum scheduled meetings	20
Lock timeout (minutes)	0
Session timeout	0

- ◆ **Save Password:** Allows the user to use the Save Password and *Auto Sign On* features (if it is enabled) or requires that the user log in for every use of the client (if it is disabled).

When this feature is enabled, the user is provided with a *Save Password* option in the Sign On Window. If this option is selected, Conferencing stores the user's password locally in encrypted form. The next time the user accesses the client, Conferencing uses the locally stored password to perform an automatic login.

- ◆ **Conferencing IM:** Allows or disallows Conferencing instant messaging and chat. This setting does not affect chat within the context of a meeting.
- ◆ **Download Public Meetings:** Allows or disallows the display of public meetings in the *Meetings* window. This setting is very helpful for large organizations; however, users must use the search feature to locate public meetings if this is disabled.
- ◆ **Download Community Address Book:** Allows or disallows the download of the Community Address Book. This setting is very helpful for large organizations; however, users must use the search feature to locate community users if this is disabled.
- ◆ **Share Desktop:** Allows or disallows the ability to share a desktop during a meeting.
- ◆ **Share Application:** Allows or disallows the ability to share an application during a meeting.
- ◆ **Share PowerPoint:** Allows or disallows the ability to share a PowerPoint* presentation during a meeting.

- ♦ **Share Document:** Allows or disallows the ability to share a document during a meeting.
- ♦ **Share Whiteboard:** Allows or disallows the ability to share the whiteboard during a meeting.
- ♦ **Remote Control:** Allows or disallows the ability for meeting attendees to be given control of the presenter's desktop or application.
- ♦ **Number of Presence Monitors:** Total number of buddies allowed.
- ♦ **Invitee PIN Length:** Sets the number of digits in a Meeting PIN.
- ♦ **User Meeting ID Length:** Sets the number of digits in Meeting ID.
- ♦ **Lock Timeout (minutes):** The number of minutes of inactivity before the user is required to unlock the client by entering a password. Set this to 0 to eliminate any locks.
- ♦ **Session Timeout (minutes):** The number of minutes of inactivity before the client is required to sign on again. Set this to 0 to eliminate any timeouts.