

Inter-Tel Audio and Web Conferencing

User Guide



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INTRODUCTION

The Inter-Tel® Audio and Web Conferencing client allows you to schedule and manage conference calls using a Web-based interface. You can use your Web account for any of the following:

- Set up conference calls and receive dial-in numbers and access codes that you can use instantly.
- Upload documents to present to callers during a conference call.
- Add participants to a conference while the call is in progress.
- Drop, mute, and put individual calls on hold.
- Start a conference call without setting up the call beforehand.
- Record conference calls to play back later.
- Assign a delegate who can create and manage your conference calls for you.
- View reports that summarize your calls over a certain time period.

In addition, some features can be accessed using a touch-tone phone, without needing to sign in to a Web account. The touch-tone interface allows you to:

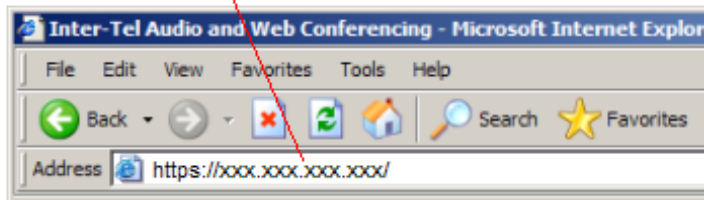
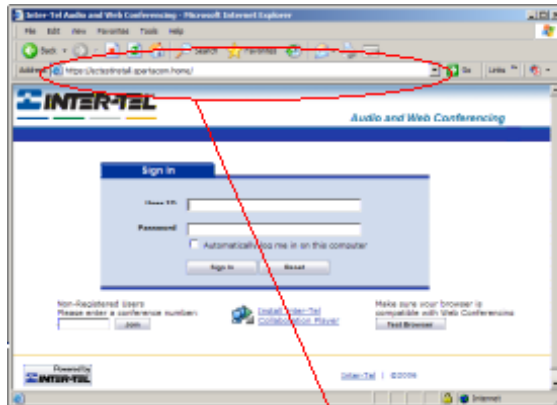
- Place outgoing calls and add callers to a conference call that is in progress.
- Hear a list of call participant names.
- Hear a count of how many callers are in the conference.
- Listen to recorded conference calls.

This user guide is intended to get you started with some basic tasks, including setting up conference calls, joining calls, viewing documents, adding participants to ongoing calls, and setting up your Microsoft® Outlook® conference form.

LOGGING ON TO YOUR ACCOUNT

To log on to your account:

1. From a Web browser, enter the uniform resource locator (URL) for the server that is holding your account information (for example, <http://ec.inter-tel.com>). If your site has a security certificate, you may be required to enter an “https” in front of the URL and acknowledge a security prompt.



2. Enter your user ID and password. User IDs are usually in the format <your name>@<company.com>. If you have never changed your password, or you are logging on for the first time, ask your system administrator for your password.
3. Indicate whether or not you want your logon information saved so you can log on automatically each time. Click **Sign In**.

To sign out of your account, click the **Sign Out** link at the top right corner of the browser window.

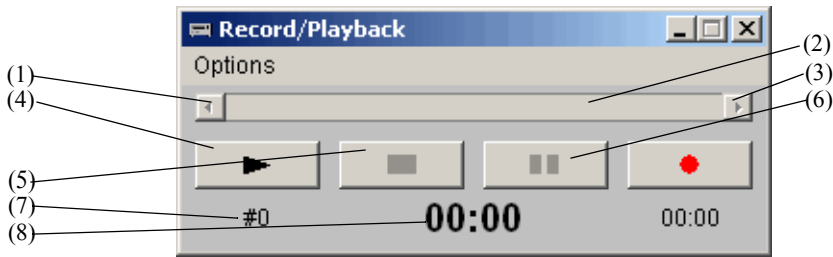
Options at the bottom of the Logon page can be used by any user, registered or non-registered:



- **Join** a conference by conference number - Non-Registered and Registered Users can join a conference if they know the conference number. Entering a valid conference number will take you to the Join page.
- **Install Inter-tel Collaboration Player** - This option installs the Collaboration Player which plays Web Conferencing recordings (.lrec files) locally on your machine.

This standalone player allows you to play back recordings that were created during the meeting and saved on your local machine.

- (1) Playback reverse - Move back one frame.
- (2) Playback - Move forward or backward multiple frames.
- (3) Playback forward - Move forward one frame.



- (4) Play - Start Playback and select the file to play.
- (5) Stop - Stop the playback
- (6) Pause - Pause the playback until you click the Play button.
- (7) Playback Index - An index counter (unlimited number) indicates where you are in playback and can be used as a reference when working with someone and you need to point to a particular frame in the recording.
- (8) Pause - Pauses the playback until you click the Play button.

To access the Playback option pages, click the Options menu. The Hide option closes any open option page so that only the main Playback interface is visible.

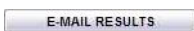
- **Test Browser** - verifies if your browser is compatible with Web Conferencing.

Prior to entering a Web Conferencing session, “Test Browser” automatically checks your machine to verify that you have everything you need to successfully initiate or attend. You can run Test Browser at any time by clicking the Test Browser button located in the bottom right corner of the Logon page.

After the test has been run, the test result page appears on your screen. If the test was successful you can continue to your meeting.



If the test is not successful, the test result page shows you the problem that was found. In your results page, if you place your mouse over the error or warning shown at the left, additional information and details will be provided to optimize your collaboration experience.



To e-mail your test results to your system administrator or to yourself, click **E-MAIL RESULTS**.

The Temporary Directory is where the Web Conferencing server places files necessary to run a Web Conferencing session. By default the directory is “c:\temp.” If you have restricted access to this directory on your machine, click the “Change Dir” button to select a directory that has read/write access.

CREATING A CONFERENCE CALL

When you create a conference call, you receive both leader and participant access codes. Distribute the participant code to callers and keep the leader code private. Unless you request otherwise, a conference call cannot begin until the person with the leader code has joined the call. In this way, leader access codes help to reduce fraudulent use of the conferencing system.

To create a conference call:

1. Click **Set up a Conference** at the bottom of the browser window.
2. Select the conference type. Your choices are:
 - **One-Time Conference:** This conference type provides an access code that is good for up to 24 hours.
 - **Recurring Conference:** This conference type provides an access code that is good for up to 24 hours each time the conference occurs.
 - **Reservationless Conference:** This conference type provides an access code that can be used at any time, for up to six months (or another period of time, greater or less than six months, defined by your system administrator).
3. Fill out the setup form for the conference type you selected.
 - Enter a conference name.

- *If this is a one-time conference:* Indicate a start date, start time and duration for the conference.

If this is a recurring conference: Indicate a start date, start time and duration. Also indicate how often this conference will occur.

If this is a reservationless conference: Indicate a start date and time.

- If your system administrator has enabled port reservations, enter a value in the Conference Size field. The Conference Size field guarantees the number of users who will be able to join your conference.
 - Enter any billing codes, if required by your company. The choices are:
 - **Department**
 - **Project**
 - Indicate any of the following call features:
 - *Leader Required:* If enabled, the person designated as the conference call leader is required to enter a code before the conference can begin. If this option is checked, but you do not designate a leader, the person that created the conference call will need to enter the Leader access code. Default setting is disabled.
 - *Conference Link:* Allows conference call participants to receive a Web link and toll-free number they can use to join the conference and view uploaded documents, if available. Default setting is enabled.
 - *Roll Call:* If enabled, participants are required to say their names before joining the conference. The name is recorded and announced when they join the conference call.
4. Click **Submit**. Your dial-in number and access codes appear at the top of the confirmation screen.

NOTE: In the example shown below, if your system is licensed for Audio and Web Conferencing, choose either an Audio and Web OR an Audio-Only conference type. If you system is licensed for Audio-only, the Conference Link field will not be present.

Reschedule the call or change other details

Audio and Web Conferencing

My Conferences Recordings Settings Reports

Change details Delete conference View current conferences

View dial-in numbers and access codes.

Conference Details Participants

Name and Time	
Conference Name	Team Meeting
Start Time	Feb 24, 2006 10:00 AM US/Arizona
Duration	2 hours <i>After duration is complete, the conference is not terminated. However, no new callers may join the call.</i>
Conference Size	2

Call Features

Leader Required	<input checked="" type="checkbox"/> The leader does not have to be present to start.
Conference Link	<input checked="" type="checkbox"/> Use these links to join the conference to
Leaders	https://

Dial-in Information

Dial-in numbers
+1-480-961-8064
x20600

Access codes
Leader: 0108972
Participant: 0118945

Email invitation

To Leaders

To Participants

Send e-mail containing information needed to join the conference and view presentations.

5. Under Dial-in information on the right side of the screen, click **To Leaders** or click **To Participants** to create an e-mail message containing information needed to join the call.

NOTE: You are not required to send an e-mail or to designate a conference call leader, but someone must enter the Leader access code before the conference call can begin if the Leader Required check box was checked when the conference was created. Usually, this is the person who set up the conference call.

JOINING A CONFERENCE CALL

You can dial into a conference, join from the Web browser or click on a link in an email invitation.

Dial in:

You can dial in to the conference using the information presented on the Conference Details tab. First, dial one of the Dial-In numbers. At the prompt, enter the access code for your conference, followed by the pound sign (#).

Click in:

If you were the person who set up a conference call, and your system administrator has given you dial-out privileges, you can join the call from your Web account.

To join a conference call from your Web browser:

1. Click **My Conferences**.
2. Find the conference you want to join, from the list of conferences, and then click **Join**. Your Current Number (shown in the upper, right corner of the screen) rings. When you answer it, you are transferred into the call. Also, if your system is licensed for Web Conferencing, and if you have set up this conference as an Audio and Web Conference, your Web Conferencing Host control will start when you click the Join button.

NOTE: When joining a meeting with Web Conferencing enabled as a delegate you will be prompted to join the Web Conference as the host. Click OK to join as the host or CANCEL to join as a participant. A delegate who joins the Web Conference as the host will force the existing host (for example, the meeting owner, if he has already joined the Web conference) to become a Web conference participant.

ALSO: If you close your Web Conferencing control and need to rejoin the Web conference, it is recommended that you first hang up your phone before clicking the Join button again. Failure to do this may result in your phone being dialed a second time which in turn may result in your voice mail being joined into the audio portion of the conference.

Email Invitation:

Click the link in your email invitation to join or to add the meeting to your Outlook calendar.

Starting Time: Mar 8, 2006 at 11:45 AM US/Arizona
Duration: 2 hours

To join the audio portion of the conference:
a. Dial +1-555-1212 or 25600 and enter access code 0165761, or
b. To have the system call you, click here: <https://test.home/call/0165761>

To join the web portion of the conference:
a. Test browser before meeting: <https://test.home/wd/testbrowser.asp>
b. Click to join at meeting start time: <https://test.home/call/0165761>

Click either link below to add this meeting to your Outlook Calendar:
<https://test.home/cgi-bin/getcalfile.cgi?p=0165761.vcs>
<https://test.home/cgi-bin/getcalfile.cgi?p=0165761.ics>

This portion of the email appears only for Web Conferencing meeting invitations.

ADDING PARTICIPANTS TO AN ONGOING CONFERENCE CALL

Call leaders who have dial-out privileges may place outgoing calls during a conference call using a touch-tone interface. In addition, the person who set up a conference may place outgoing calls from their Web account.

At any time during the call:

- *To hear a list of options, press pound (#) twice.*
- *To return to the conference call, press star (*) twice.*

To dial out using touch-tones:

1. During the conference call, press the pound (#) button twice.
2. Press **2** to place a call.
3. Enter the phone number.

NOTE: For calls in the United States, Canada, and Caribbean countries, **you must dial 1 and the area code**. For international calls, include 011 and the country code.

4. *To keep the new call and return to the conference:*
 - a. Press star (*) twice.
 - b. When you hear the voice prompts, press **1** to return to the conference with the new call.

To drop the call:

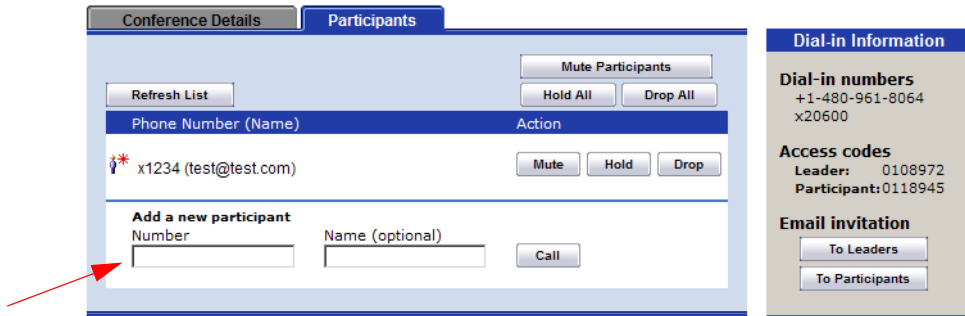
- a. Press star (*) twice.
- b. After you hear the voice prompt, press **2** to drop the call.

To place a call from your Web account:

NOTE: You may dial out only from your Web account for conferences that you set up.

1. Log on to your Web account.
2. Select a conference from the list on the My Conferences tab.

3. Click the Participants tab.
4. Enter the phone number in the **Dial Out** section at the bottom of the screen, and then click **Call**.



INSTALLING/USING THE OUTLOOK CONFERENCE FORM

You can easily associate conference calls with appointments you schedule in your Microsoft Outlook calendar. Through a simple form, you can generate telephone numbers, access codes and Web links to use for voice conferences and Web presentations. These procedures detail the process for installing the form in Outlook 2002. The steps for Outlook 2000/Office XP are similar.

To install the conference form:

1. Navigate to <https://<server name>/Enterprise.oft>, where <server name> is the computer on which the form is located. Acknowledge the prompt that appears. The URL is case-sensitive (type Enterprise.oft, not enterprise.oft). Whether or not your site has implemented security certificates will determine whether or not a prompt appears. https in front of a URL indicates a secure connection, and you will need to acknowledge the security prompt to continue.
2. Click **Open** when prompted with the File Download dialog. The Outlook appointment form appears. (On some systems, the Open prompt may not occur.)
3. Select Tools – Forms – **Publish Form**, and then from the Publish Form As dialog, do the following:
 - a. Select **Personal Forms Library** from the Look In field drop-down menu.
 - b. Enter the name you want to use for the form (for example, “Conferencing”) in the Display Name field. When you use the form, this name appears on the tab that is added for the conference form in Outlook.
 - c. Click **Publish**. The window closes and returns you to the original Appointment window.

4. Right-click **Calendar** in your Outlook folder list and select **Properties**.
5. Click the General tab. From the drop-down list, select **Forms**.
6. Select **Personal Forms Library** from the drop-down list, and then double-click the name you gave the form you created in step 3 on [page 9](#).
7. Click **OK**. This allows the Inter-Tel Audio and Web Conferencing conference form tab to appear for all appointments and meeting requests.
8. Close the original Appointment window, and when prompted to save changes, click **No** (because at this point you are not actually creating an appointment; you are only publishing the form for future use).

To use the conference form:

1. In Outlook, schedule an appointment or meeting request. A conferencing tab appears with your appointment and scheduling tabs.
2. To include a conference call option with your appointment or meeting request, click the Inter-Tel Enterprise tab to open the conference form. The first time you use the form, enter the name of your conferencing server in the **Inter-Tel Enterprise server** field. The server name is typically in the format <enterprise.yourcompany.com>. Contact your system administrator for the correct server name. You only need to enter the server name the first time you use the form.
3. Enable **This appointment includes a conference call**. If you are prompted to login, enter your username and password, and then click **Sign In**. If your system administrator has enabled Port Reservations, you will need to enter a value for Conference Size, and then click Check Port Availability. If there are available ports at the time you wish to create your conference, you will be presented with the following options:
 - Dial in phone number(s)
 - Links for joining the conference
 - Call Features you can select for this particular conference
 - Whether or not the Leader is required for the call to start
 - Whether or not participants are prompted to record their names before they join the call (Announce Callers)
 - Whether this call includes a Web Conference (this will only appear if your system is licensed for Web Conferencing)
 - Department and Project codes for cost accounting purposes

4. After selecting the conferencing options you want, click one of the Access Code radio buttons (Leader access code, Participant access code, OR Both Leader and Participant access codes). Next, click the Appointment and Scheduling tabs and enter appointment information as you would for any other appointment or meeting request. The dial-in number and access codes are available in the main message body of the Appointment tab.

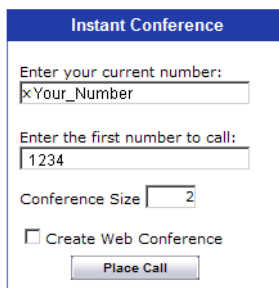
Also, if you included an agenda, it is appended after the conference call information.

5. Do one of the following:
 - For *appointments*, click the **Save and Close** button at the top of the window.
 - For *meeting requests*, click **Send**.

SETTING UP AN INSTANT CONFERENCE CALL

To set up an instant conference call:

1. Click the Home tab.
2. Enter your current number from the **Instant Conference** panel, and then enter the number you want to call.
3. If your system administrator has enabled Port Reservations, enter a value for the Conference Size. The default is 2. If you know that you will want more than 2 participants in the call, increase this value so those participants can be added later.
4. If your system is licensed for Web Conferencing, you may click the check box next to Create Web Conference which will launch the Web Conferencing Host Control after you click the Place Call button.
5. Click **Place Call**. Wait for your phone to ring, and then answer it. Now wait for the number you called to answer. You are now in the interface shown on [page 4](#).



The screenshot shows a window titled "Instant Conference". It contains the following elements:

- A label "Enter your current number:" followed by a text input field containing "x>Your_Number".
- A label "Enter the first number to call:" followed by a text input field containing "1234".
- A label "Conference Size" followed by a spin box containing the number "2".
- A checkbox labeled "Create Web Conference" which is currently unchecked.
- A "Place Call" button at the bottom.

NOTE: This feature will only be available if your system administrator has granted you dial-out privileges.

MODIFYING ACCOUNT SETTINGS

To change your password:

1. Click the Settings tab.
2. Click the **Password** button.
3. Enter the old password, and then enter the new password. Enter the new password again to confirm it, and then click **Submit**.

To change your current number:

1. Click the Settings tab.
2. Click the **Current number** button.
3. Enter your current number in the field, and then click **Submit**. If the number you wish to save as your current number is an extension, place an “x” before it. Otherwise, make sure to place a “1” plus the area code before your number. **Do not use any spaces, dashes, or parenthesis.**

To select a format for e-mail invitations:

1. Click the Settings tab.
2. Click the **E-mail invitations** button.
3. Click the “view sample” link next to the long and short formats to get a preview of what each e-mail will look like.
4. Select either the **long** or **short** format, and then click **Submit**.

To select a delegate to manage your conference calls:

1. Click the Settings tab.
2. Click **Delegates**.
3. Enter the user ID of the person you want to designate as your delegate, and then click **Submit**.

CREATING A SUMMARY REPORT

To create a summary report:

1. Click the Reports tab.
2. Click the **Conference Details** button.
3. Select a date range.
4. Optionally, enter a project code. If this field is populated, the report will only show records for conferences that were created with this project code.
5. Select the format of the report, either to download as a CSV (comma-separated values file), or to show the report in a browser window.
6. Click **Create Report**.

RECORDING/LISTENING TO CONFERENCE CALLS

To record a conference call (when conference has been created as Audio-only):

1. Select the appropriate conference from the My Conferences tab.
2. Click **Start Recording** at the top of the page.
3. When finished, click **Stop Recording**.

To listen to an Audio-only recorded conference call:

1. Click the Recordings tab. Recordings are listed by the name of the conference that was recorded and the date and time the recording was made.
2. Click the name of the recording.
3. Listen to the conference using your computer or your telephone (enter the access code shown).

NOTE: If you dial in to the recording, **the recording access code is different from the original conference access code.**

Home Set Up a Conference My Conferences **Recordings** Settings Reports

Sales Call

[Delete recording](#) [View all recordings](#)

To listen to the recording through your computer, click **Play**

To download the recording to your computer:

Play recording now Select a file type: wav

Save recording Select a file type: wav

To listen to the recording using your telephone:

Click to call Your current number: x>Your_Number

Dial-in numbers +1-480-961-8064 (Main Number)
x20600 (Hunt Group)

Access code 0188756

Conference name [Sales Call](#)

Date recorded Feb 24, 2006, 10:30 AM US/Arizona

Duration 7 seconds

To listen by phone, call the dial-in number and enter the access code

Click Email to create an e-mail message containing the dial-in number and access code.

To create an e-mail message containing the recording dial-in and access number:

1. Find the appropriate recording under the Recordings tab.
2. Click **Email**.

To control playback using your touch-tone dialpad:

If you listen to a recorded conference call through your phone, you may use your telephone dialpad to pause, back up, and fast forward.

1 Back up to beginning	2 Pause/Resume	3 Forward to end
4 Back up 1 minute	5	6 Forward 1 minute
7 Back up 10 seconds	8	9 Forward 10 seconds
*	0	#

ACCESSING USER OPTIONS DURING A CONFERENCE

To access conference options from a phone during a conference:

1. At any time during a conference call, press the pound button (#) twice to get to the main menu.
2. Press the button corresponding to the following main menu options:
 - *To Mute/unmute the line:* Press 1.
 - *To hear the number of callers:* Press 3.
 - *To return to the conference:* Press *.

NOTE: If you do not select an option, you are automatically returned to the conference.

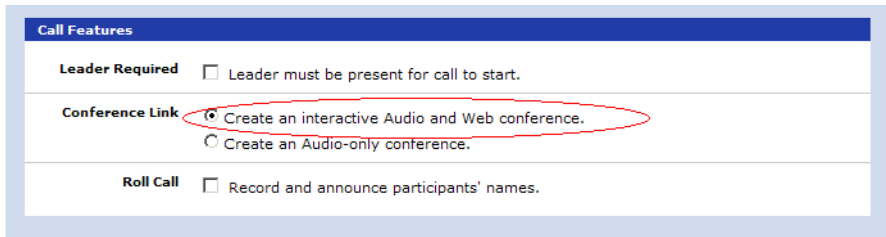
WEB CONFERENCING

IAWC (Inter-Tel Audio and Web Conferencing) offers Web Conferencing as a licensed option. If your IAWC server is licensed to run the Web Conferencing Option, you see “Audio and Web Conferencing” noted in the top right corner.

The screenshot displays the Inter-Tel web conferencing interface. At the top, the Inter-Tel logo is on the left, and navigation links for '@linktivity.com', 'Help', and 'Sign Out' are on the right. A blue navigation bar contains 'Home', 'Set Up a Conference', 'My Conferences', 'Recordings', 'Settings', and 'Reports'. The 'Settings' link is circled in red and labeled 'Audio and Web Conferencing'. Below the navigation bar are three main sections: 'Instant Conference' with input fields for current and first numbers, a 'Conference Size' dropdown set to '2', a 'Create Web Conference' checkbox, and a 'Place Call' button; 'Set Up a Conference' with buttons for 'One-time conference', 'Recurring conference', 'Reservationless conference', 'Learn about conferences', and 'View My Conferences'; and 'Other Features' with buttons for 'Recorded conferences', 'Usage reports', and 'Account settings'.

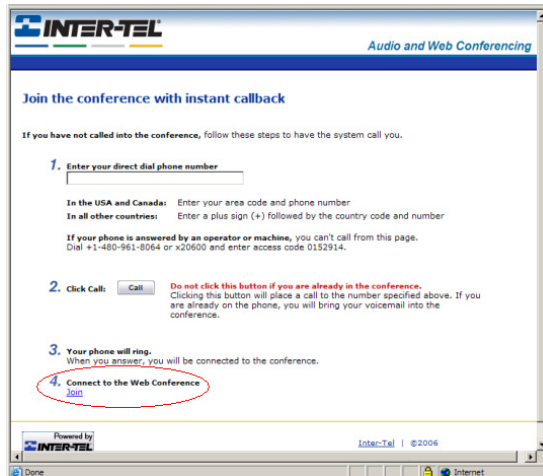
To use the Web Conferencing option:

1. Select “Create an Interactive Audio and Web Conference.” in the Call Features portion of a Set Up a Conference form.



Call Features	
Leader Required	<input type="checkbox"/> Leader must be present for call to start.
Conference Link	<input checked="" type="radio"/> Create an interactive Audio and Web conference. <input type="radio"/> Create an Audio-only conference.
Roll Call	<input type="checkbox"/> Record and announce participants' names.

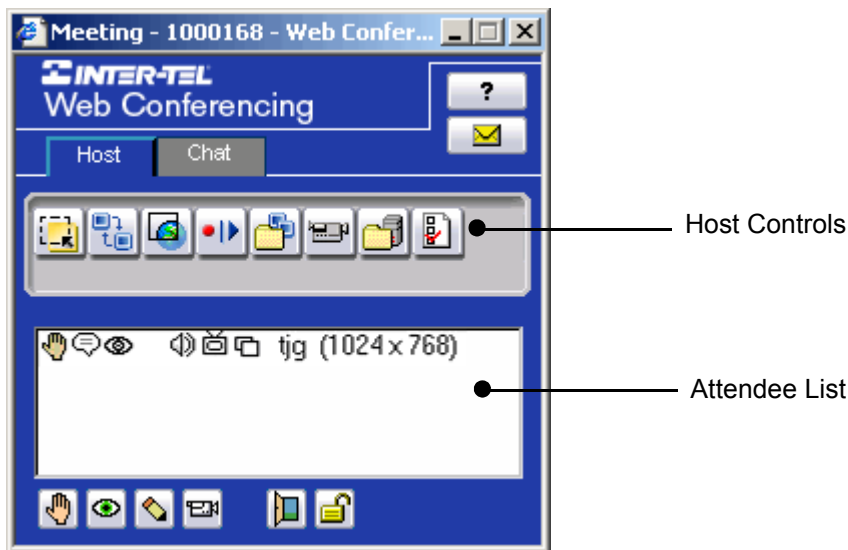
2. Click the link of the conference you created and a “Join the conference with instant callback” Web page appears.
3. Click the join link in step 4 to start your Web Conferencing session.



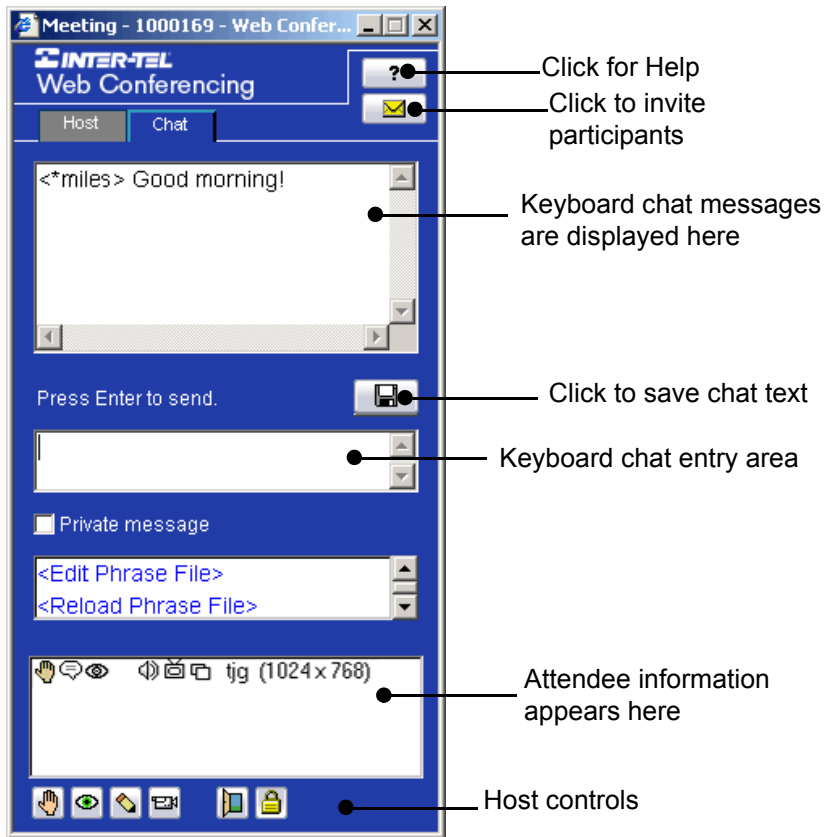
4. A small browser window will open and it will run a test browser to see if your computer environment supports Web conferencing. Once it passes, a security certificate appears, select “Yes” to load the Web Conferencing window. The Host Console will then appear on your desktop.

Host Console

The host console consists of three parts: the host controls, and the attendee list on the Host tab, and keyboard chat on the Chat tab.



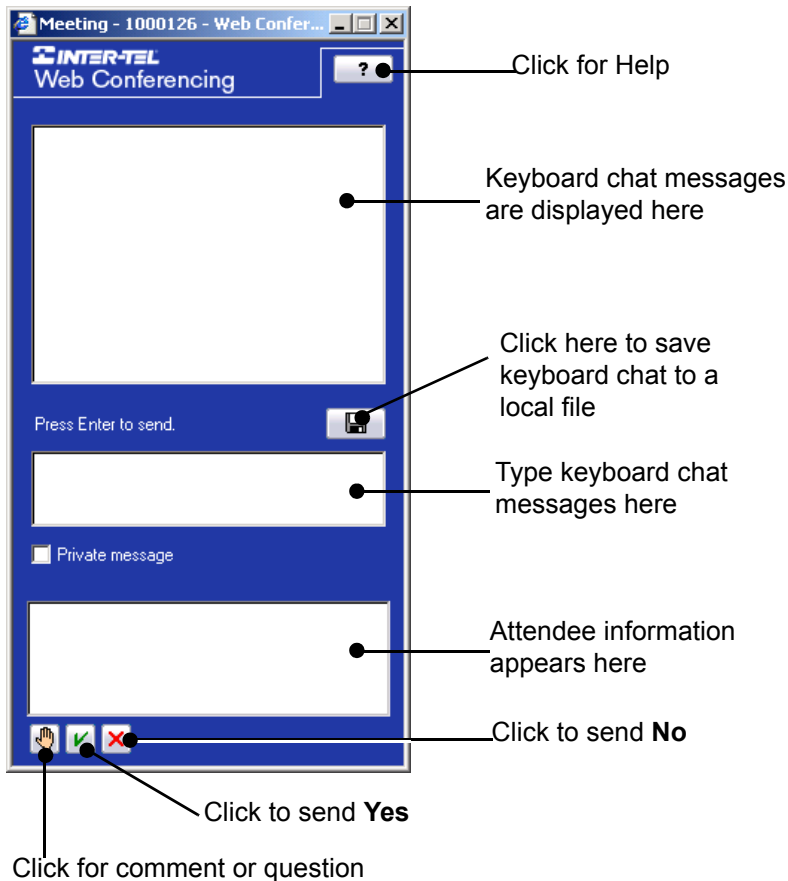
To separate the Attendee List from the host console, right-click in the Attendee List white space and select **Undock** from the drop-down menu. After it is undocked, you can resize your Attendee List by dragging a corner with your mouse. To return the Attendee List to the host console, right-click in Attendee List chat white space and select **Dock** from the drop-down menu.




To separate the keyboard chat from the host console, right-click in the keyboard chat white space and select **Undock** from the drop-down menu. After it is undocked, you can resize your keyboard chat window by dragging a corner with your mouse. To return keyboard chat to the host console, right-click in the keyboard chat white space and select **Dock** from the drop-down menu.

Client Console

Web Conferencing users who successfully connect to a meeting will have the Client Console appear on their desktop, as shown below.

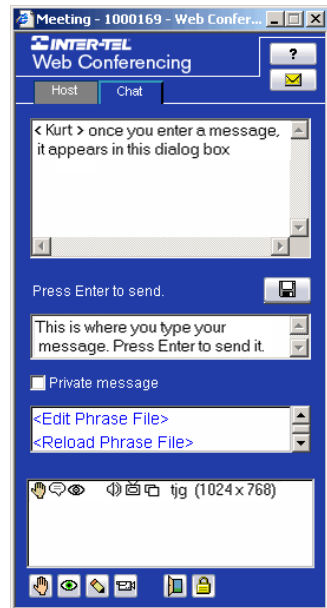


To undock the keyboard chat or attendee list dialog boxes from your client console, right-click in the white space and select **Undock**. Once undocked, the window can be resized by dragging a corner of the Keyboard Chat or Attendee List dialog box with your cursor.

To put your Keyboard Chat or Attendee List window back into the client console, right-click in their white space and select **Dock** from the drop down menu, or click on the  control.

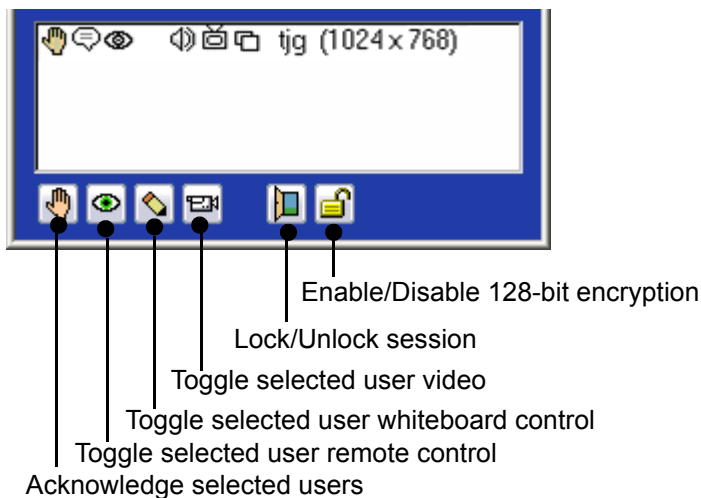
Keyboard Chat

To undock the keyboard chat or attendee list dialog boxes from your client console, right-click in the white space and select **Undock**. After it is undocked, the window can be resized by dragging a corner of the keyboard chat or attendee list dialog box with your cursor. To return your keyboard chat or attendee list window to the client console, right-click in the white space and select **Dock** from the drop-down menu.





Attendee List

This example of the attendee list shows one person logged into this meeting with the meeting host. The attendee list shows all participants attending the meeting. You will not see your own ID in your attendee list, however, your ID will be listed in everyone else's list. The icons that appear next to the user ID indicate what controls (remote control, keyboard chat, or video) are available to that user.



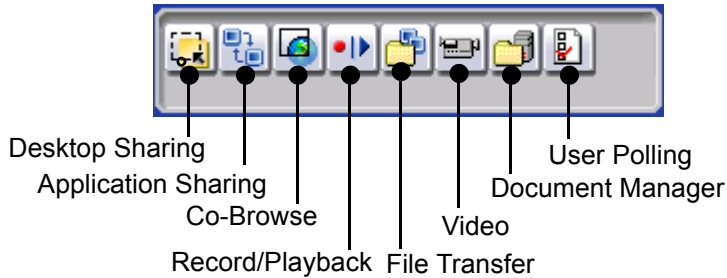
The buttons below the attendee list only appear on the host console. They are a fast way for the host to enable or disable the attendee's access to controls such as video, whiteboard tools, or remote control.

If the user has a flag next to their ID it means they have their "hand raised," and you click the red flag button to remove the flag icon to acknowledge them.


Use the door button  to lock the session so that no more people can join the meeting. To open a locked meeting, click the closed door button .

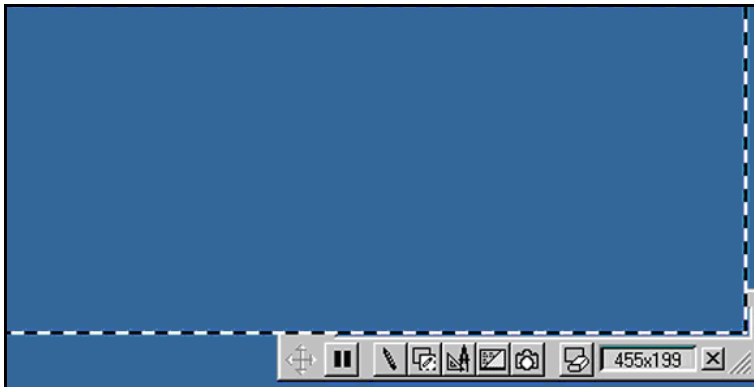
Host Controls

The buttons at the top of the Host Console are where you can start any of the controls (Desktop Sharing, Application Sharing, Co-Browse, Record/Playback, File Broadcast, Broadcast Video, Document Management, or User Polling).













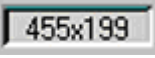

Using the Viewport


1. To open your Desktop Sharing feature, click the  button in your host console.



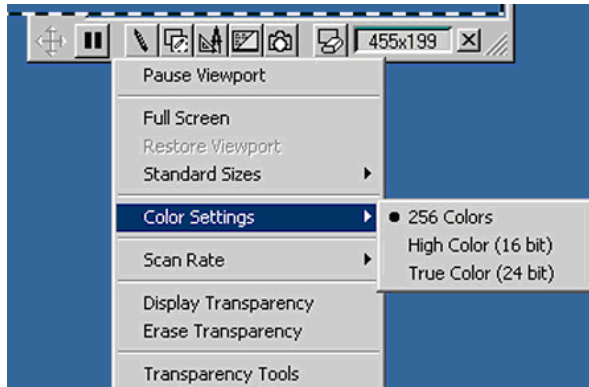
At the bottom right corner of your **HOST** Viewport, you see the following Viewport controls, as described in Table 1 on [page 23](#).

Table 1. *Viewport Icons*


ICON	MEANING/USE
	Move Viewport. With this tool, you can click and drag your Viewport anywhere on your desktop.
	Pause. Click this button to pause the Viewport broadcast. After the Viewport is paused, this button changes to  . To broadcast your Viewport, click this button.
	Draw Mode. Click this button to set your desktop to draw mode, which allows you to draw with a pen. After the pen mode is enabled, this button changes to  to start cursor mode. Click this button once more to change the Viewport back to cursor mode.
	Hide Transparency. You cannot click on something that is covered with a drawing. To click on something that is hidden under a drawing, select hide transparency. When you can see it, you can select it with your cursor.
	Show Transparency Tools. Click this button to see drawing options such as Font, Line Thickness, Square, Circle, Cut/Move, or Color Selector.
	Hide Desktop Icons. Click this icon to hide all the desktop icons. Click again to show the icons.
	Viewport Snapshot. Click this button to save an image of what currently appears on your Viewport. It saves the bitmap on your hard drive. The first time you click Viewport Snapshot, a browse window appears for you to choose the directory where you want your snapshots stored. If you want to change the snapshot directory later, open transparency tools and click Options . From the menu, select Set Snapshot Dir .
	Erase Transparency. Click this button to clear everything you have drawn or written on your transparency. After it is erased, you cannot bring it back to your drawing.
	Size. Shows current Viewport size in pixels.
	Close. Click this button to close the Viewport.

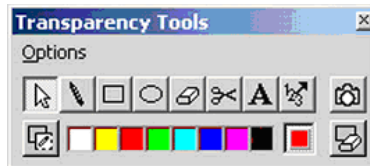
To see other Viewport transparency options, right-click the  icon on your start bar to open a menu that offers screen options such as Full-screen, Restore Viewport and Standard Sizes (800x600, 640x480, and 320x240). The menu also contains transparency options such as Hide Transparency, Erase Transparency, and Transparency Tools.

To select the number of colors (256, High Color, True Color) that your Viewport transmits, right-click the Viewport icon, select **Color Settings**, and then select 256 Colors, High Color (16 bit) or True Color (24 bit). From the Viewport menu you can also select the Standard Sizes of your Viewport (800x600, 640x480, and 320x240).



Transparency Tools

When you click the  icon in your Viewport control panel, the Transparency Tools window appears, as shown below.



Your desktop has two modes, cursor mode and draw mode.

- When your desktop is in cursor mode, you can use your cursor to click on objects in your screen. The cursor mode is the default.
- When your desktop is in draw mode, the cursor becomes one of many drawing tool cursors that allow you to draw, annotate, or write on your transparency.

You can think of the transparency as a clear slate over your screen, on which you can temporarily draw, and add notations or text.


To see other transparency options, right-click on your start bar  to display a menu that offers options such as Hide Transparency, Erase Transparency or Transparency Tools.

Table 2. *Transparency Icons*















ICON	MEANING/USE
	Cursor Mode. Click this button to set your desktop to cursor mode.
	<p>Draw Mode. Click this button to set your desktop to draw mode. Clicking any drawing tool on your Transparency Tools set will switch your desktop to draw mode.</p> <p>After you end the session, your drawings or notations disappear. If you want to save what you see on your screen, press the print screen button on your keyboard and then open Paint, paste and save it as bitmap picture of the screen.</p>
	<p>Hide Transparency. Select Hide Transparency to temporarily hide everything that you have drawn or written on your transparency so that you can bring your drawing back later.</p> <hr/> <p>NOTE: You cannot click on something that is covered with a drawing. To click on something that is hidden underneath a drawing, select hide transparency. If you can see it then you can select it with your cursor.</p> <hr/>
	Erase Transparency. Click this button to clear everything you have drawn or written on your transparency. After it is erased, you cannot bring it back to your drawing.
	Rectangle Tool. Click this button and then click the point on your desktop where you would like to start your rectangle. Then drag the cursor to where you want to place the opposite corner of your rectangle.
	Ellipse Tool. Click this button and then click the point on your desktop where you would like to start your ellipse. Then drag the cursor to set the desired size of your ellipse.
	Eraser Tool. Click and drag the tool to remove parts of a drawing.
	Cut Tool. After you click the cut tool and the crosshairs appear, move the cut tool crosshairs to a point where you would like to start your cut box. Press and hold your mouse button down as you drag the cursor until the cut area covers what you want to capture in your drawing. Once captured, you can delete the cut box with all its contents using your Delete key. You can also move your cut box along with its contents by moving the cut cursor over your cut area and after you see the crosshair cursor become a crosshair cursor with arrows then hold your mouse button down and drag your cut box to the desired location.

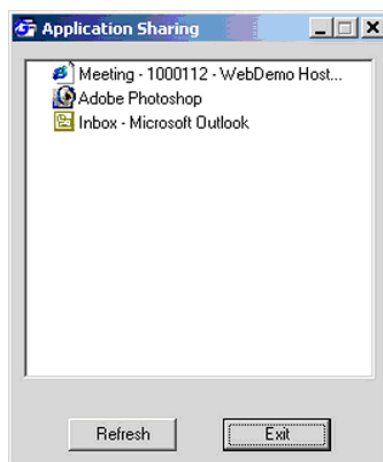
Table 2. *Transparency Icons (Continued)*

ICON	MEANING/USE
	Text Tool. Adds text to your transparency. To move the ellipse, click on the edge of the ellipse and, when crosshairs appear, hold the mouse button down and drag the text box to the desired spot on your desktop. After you click outside the text box, your text is set on your transparency. After the text is set, you can only move the text with the cut tool.
	Notation Tool. Click this button and click at a point of interest on your screen. Each time you click, the number that appears with the arrow increments by one.
	Viewport Snapshot. Click this button to save an image of what currently appears on your Viewport. It saves the bitmap on your hard drive.
	Hide Transparency. You cannot click on something that is covered with a drawing. To click on something that is hidden under a drawing, select hide transparency. When you can see it, you can select it with your cursor.
	Erase Transparency. Click this button to clear everything you have drawn or written on your transparency. After it is erased, you cannot bring it back to your drawing.
	Close. Click this button to close the Transparency Tools.

Using Application Sharing

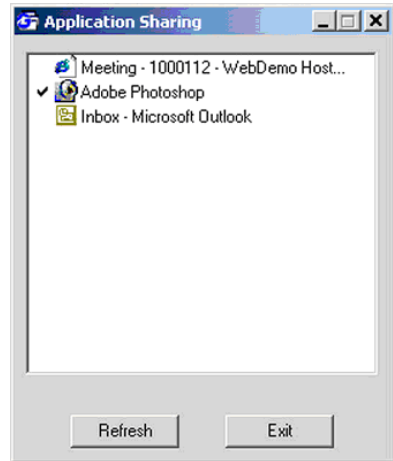
To use Application Sharing, click **Application Sharing**  on your host console.


The Application Sharing window shows all the applications that the meeting host has running. At this point, if an attendee logs into the meeting, all they will see is a gray screen until the host selects which application(s) they would like to appear in the application window on the client screen.

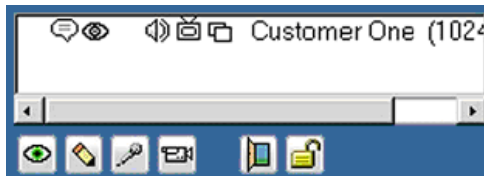


To have an application appear in the Application sharing window, select the application by putting a check next to it, as shown in the example below. The running application will then appear in the client's application window.


NOTE: If you have many applications running on your desktop, it is important to minimize any running application that you do not intend to share in your application window. If you leave them up, they may appear in the foreground, masked out with graphics but also blocking the view of the application that you want to show.



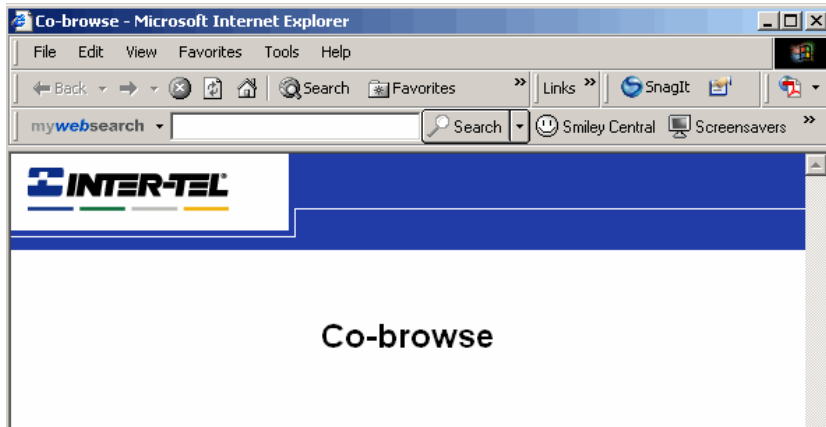
After everyone can see your application, you can allow particular individuals or all attendees to try out the application by giving him or her remote access. You can give one or more attendees remote access by highlighting their name in the attendee list and clicking the remote control button  under the Attendee list. An eye icon will appear next to their name if they access your application remotely. Giving them remote access allows them to simultaneously control the application running on your desktop.




Using Co-Browse

When you start the Co-Browse control , a browser window opens on your desktop and on the desktops of everyone attending your meeting. As the meeting host, after you start browsing the Internet, every Web page you view will also appear on the Co-Browse windows of your meeting attendees.

When you close your host Co-Browse window, you will be offered the option to allow the browser windows to remain open on the desktops of your attendees or to close them. If you allow the attendee browser windows to remain open, after you close your host browser, the attendees will then have control over their browser window.



Using Record/Playback

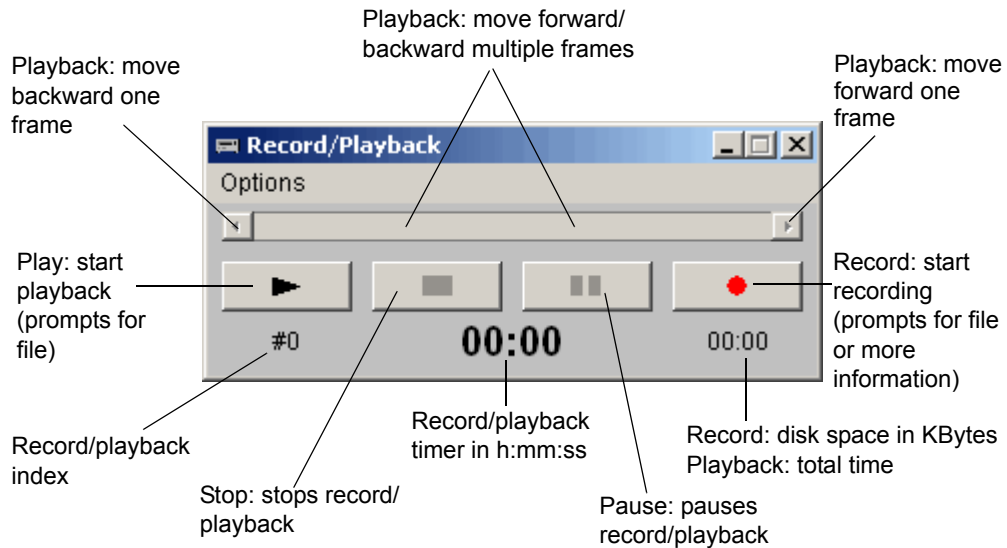
The Record and Playback option  records selected features for playback at a later time. The meeting host can choose what is to be recorded: Viewport, video conferencing or keyboard chat. Recorded sessions can be made available for attendees to play back whenever they want to view the recorded session.

NOTE: You can change Viewport settings before you start recording. Once the recording has begun, Viewport settings cannot be changed.

Recordings can be saved on the Web Conferencing server machine on the host's local PC or Network Neighborhood. The host can play back recorded meetings stored locally by selecting the playback option on the Record and Playback control panel.

If the recorded session is stored on a local machine, only the Host of the session can play back the recorded session. If the recorded session is stored on the Web Conferencing server machine, other users can access and view the recorded session.

To start a Record and Playback session, the Host clicks the Record and Playback icon in the Host control panel to open the Record and Playback console.




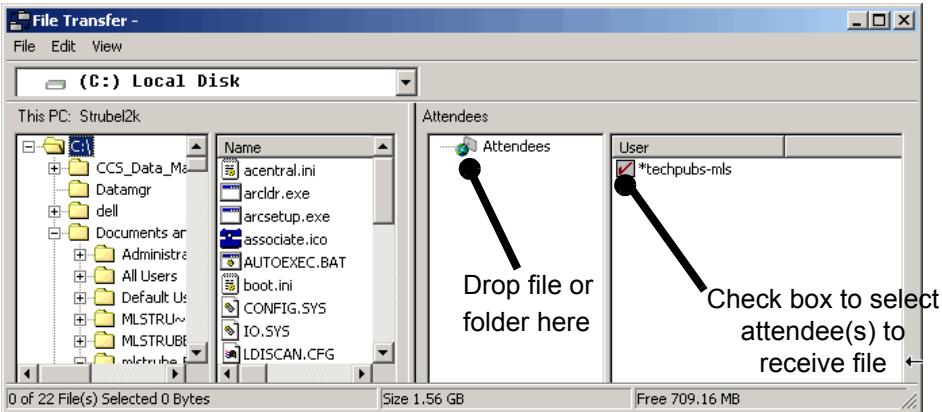
- **Index:** An index counter (unlimited number) is provided and is indicated by the pound sign (#). The index indicates where you are in a recording or playback and can be used as a reference when working with someone and you need to point to a particular frame in the recording.
- **Timer:** A Timer located under the stop and pause buttons keeps track of the elapsed time during the recording session. The counter is in mm:ss and can go up to 99 minutes per session.


To access the **Record**, **Playback**, or **Export** option pages, click the Options menu. The **Hide** option closes any open option page so that only the main Record\Playback interface is visible.



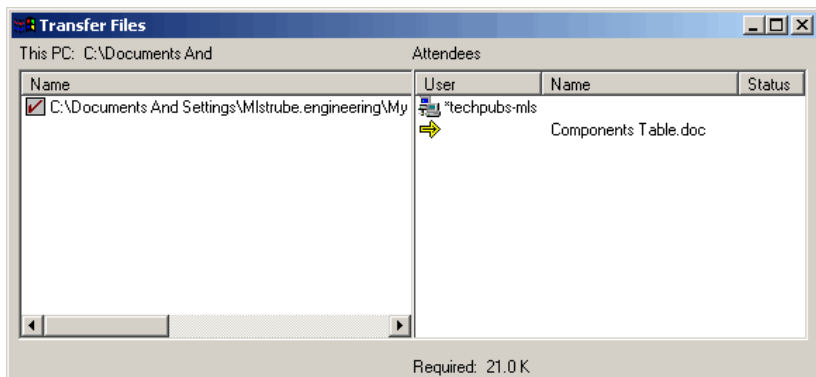
Using File Transfer

Using File Transfer , a Host can distribute a folder or file to some or all the attendees in the meeting. If you do not want one or more attendees to receive your folder or file, clear the check box next to the attendee's name in the User list.



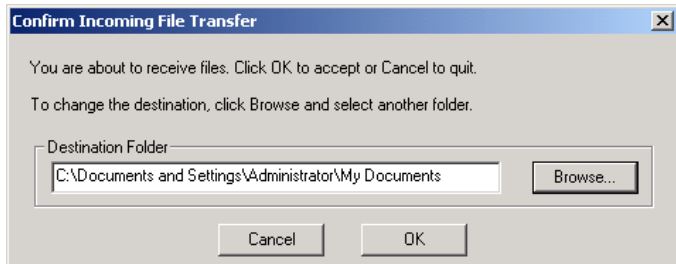
To use File Transfer, select a file or folder on your computer, shown in the left panel, and drag it over the Attendees icon  to distribute the file or folder to your session attendees.

After you drag the folder or file over the Attendees folder, you see a Transfer Files dialog, as shown below. Click **Start** to begin the file transfer.




The meeting attendee receives a dialog box, as shown in the example below, where they can choose the location to store the file being transferred. When the attendee clicks **OK**, your folder or file will be transferred to the attendees's computer and the status in the Transfer Files displays "complete." Click **Done** to close the window.

If the attendee refuses the file transfer by clicking **Cancel**, the status displays “Cancelled.” Click **Done** to close the window. When you are finished sending files, close the File Transfer window.



Using Broadcast Video

To open your Video Conferencing window, click the Video Conferencing button  in your control panel. When you start Video Conferencing, the monitor will be blank until you click the **Preview Video** button. It may take a second or two to initialize the camera. If your camera is properly installed, your video transmission will appear in your Video Conferencing monitor. The Preview allows you to make adjustments to your camera.

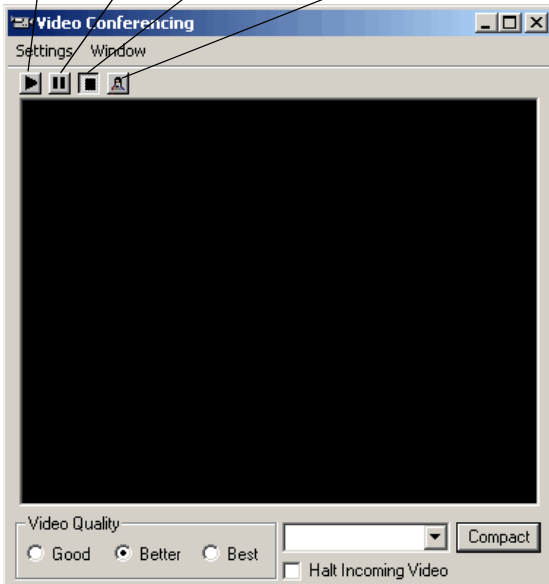
The example on the left shows the Video Conferencing window before transmission. When your preview shows what you want to display, click **Broadcast Video**.

Broadcast Video

Pause

Stop

Preview Local Video



In the Video Conferencing window you can adjust the Video Quality. The default setting is Better. If you want the Best quality, select Best. However, if the Internet is congested or if your computer or the receiving computer is having problems receiving data, it may help to set Video Quality to Good.

The Video Conferencing window has the following menu bar options:

- **Settings**

- **Viewer Size:** 176 x 144 or 352 x 288
- **Frames Per Second:** The higher the number of frames per second, the smoother the video motion. When there is a higher number of frames, more data is sent.
- **Video Quality:** Your choices are Good, Better, and Best.
- **Video Source:** Video Source is unavailable until you start capturing video. To start capturing video, click **Broadcast**. After you begin sending video, select the Video Source option to make changes to your camera setting. The Video Source tabbed pages are usually different for each camera, because they depend on the camera's driver.

If you have more than one video camera connected to your computer, the Capture Source page allows you to select the video camera you want to use.

- **Video Format:** Select the capture format.

- **Window**



- **Compact/Full Mode:** When you change to Compact mode, your Video Conferencing window shows only one window. While in Compact mode, video data is received from only one user. You can select the user you want to view from the drop-down box. After you click **Compact**, the button changes to **Full**.

The Host can allow multiple session attendees to transmit video, in which case you will see a window for each person allowed to transmit video. The Cascade or Tile options allow you to easily rearrange multiple video windows into a Cascade or Tile layout.

Giving Desktop or Application Control to an Attendee

As the host, you can share your desktop or an application with the attendee(s) during a Web Conferencing meeting and then give someone else control.

To give control of your desktop to someone else:

1. From the host console, share your desktop or an application.
2. On the attendee list, click the name of the attendee to whom you are giving control.
3. Click the eye icon below the attendee list to enable or disable the attendee's control.
 - When the host has control, the icon next to the name in the attendee list is shown as .
 - When the attendee has control, the icon next to the name in the attendee list is shown as .

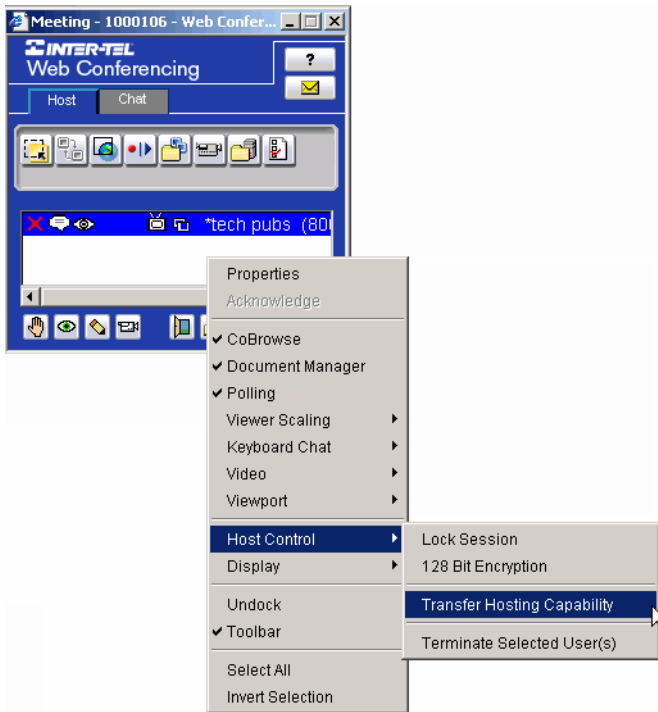
While an attendee has control of your desktop or an application, they can use their mouse and keyboard as if they were at your computer. However, their Web Conferencing console controls do not change.

Giving Meeting Control to an Attendee

During a meeting, you may want an attendee to have the control tools (desktop sharing, application sharing, co-browse, record/playback, file transfer, broadcast video, document management, and user polling) available only to the host.

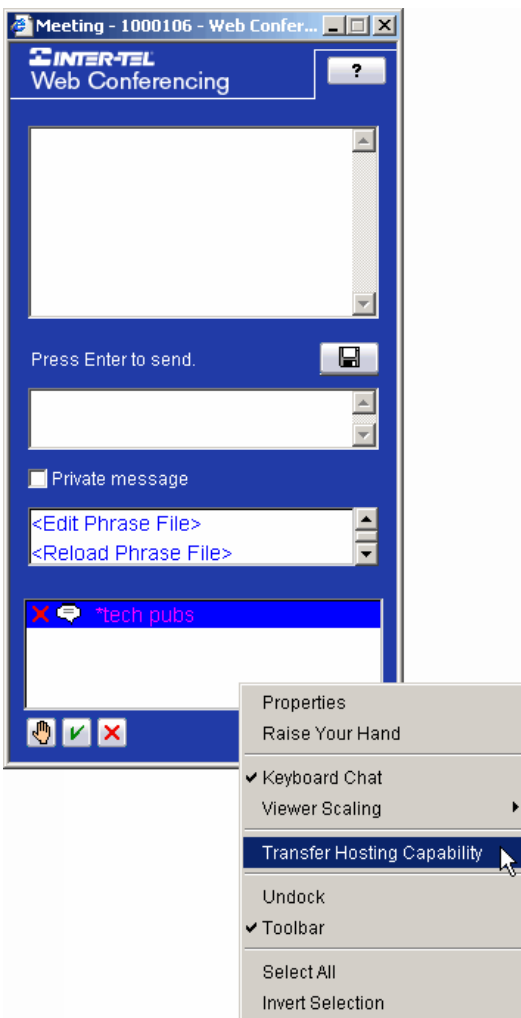
To transfer meeting control from the host to an attendee:

1. Place your cursor in the attendee list and right-click.
2. Select Host Control, and then **Transfer Hosting Capability**. The attendee now has the host console and the former host has an attendee console without controls.





NOTE: Only the original host has the ability to transfer control and invite participants to a session. When control is transferred to an attendee, their console does not include the envelope icon shown in the example above.

To transfer control back to yourself as the original host, place your cursor in the attendee list, right-click, and then select **Transfer Hosting Capability**, as shown below.



Document Management

All users (registered and unregistered) can view Public documents by selecting **Public Area** from the menu on the left. In the Public Area, click **View Public Documents**. Click **Launch Document Manager** to view any files in the Public folder.

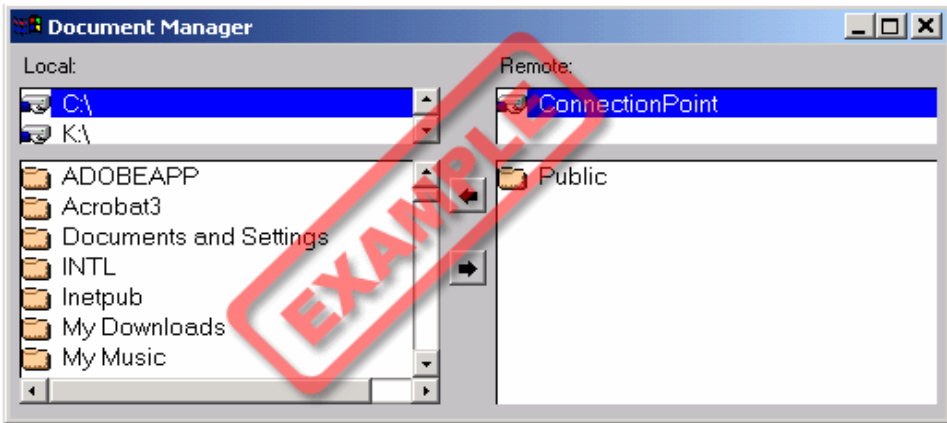
The Document Manager shows your local drive in the left window. In the right window you can view the folder(s) and file(s) to which you have access. Use  and  to copy files to or from the Public folder to your local drive.

Before you can view your Private documents folder, if you are a registered user you must log on by selecting Document Manager of the menu on the left





Document Management

All Web Conferencing users (registered and unregistered) can view Public documents by selecting Public Area off the menu in the left column. Once in the Public Area, click the View Public Documents button. Click the Launch Document Manager button to view any files in the Public folder.



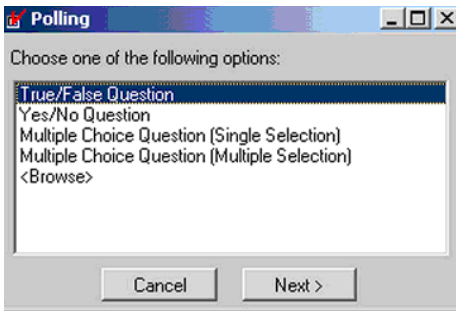
Here is a quick list of Document Manager windows facts:

- The top window shows resources available.
- The bottom window shows the resource/folder selected in the top window.
- All windows can be resized.
- Add a Uniform Naming Convention (UNC) resource by right-clicking your mouse in the top local window.
- See all file/folder options (such as Properties, Cut, Copy, Paste, Delete, Rename, Refresh, Arrange, New, Select All, Invert Selection) by right-clicking your mouse in any bottom window.
- Only logged in (registered) users can alter remote files or folders. Only “owners” or the “superadmin” can alter existing files.

- For convenience,
 - Use the right arrow button  to copy selected local files to the remote destination.
 - Use the left arrow button  to copy selected remote files to the local destination.
- Launch a local file by double-clicking it:
 - If you are running MS JVM on your machine, file associations are used.
 - If you are running Sun JVM on your machine, only executable files will be run.
- The meeting host can launch (if it's not already running):
 - local/remote **.lrec** files. These files will use the Recorder.
 - local/remote **.poll** files. These files will use Polling. The files will appear in preview polling mode.
- Hard drive space limits the documents that can be stored on the server or locally.

USER POLLING

To access User Polling, click the User Polling button  on the Host console.



When the polling window appears, you have five polling options.

All the polling types share the same process; the main difference is how you word the questions.

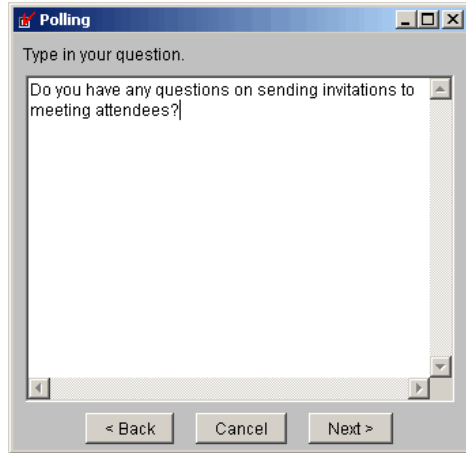
To create polling questions:

1. Select the type of poll question and then click **Next**. The types are as follows:
 - **True/False Question** – You compose a question that you want to ask the attendees of your meeting that can be answered either with True or False.
 - **Yes/No Question** – You compose a question that you want to ask the attendees of your meeting that can be answered either with Yes or No.
 - **Multiple Choice Question (Single Selection)** – You compose a question along with a selection of possible answers. The attendees of your meeting will be allowed to choose only one of the answers from the selection of answers.
 - **Multiple Choice Question (Multiple Selection)** – You compose a question along with a selection of possible answers. The attendees of your meeting will be allowed to choose one or more of the answers by selecting their answer(s) with a check mark.
 - **<BROWSE>** – The <Browse> option allows you to open a saved poll question to show to your meeting attendees. You can save the polling questions you create for later use when you are previewing your question by clicking the **SAVE** button, which saves the question as a ***.poll** file.

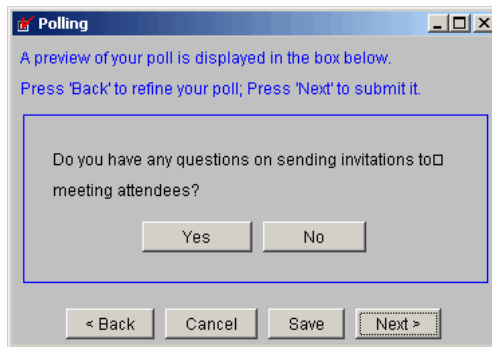
2. Type your question in the text box.
3. To preview your poll, click **Next**.

NOTE: On the preview screen, the character represents where you pressed **Enter**. If you do not press **Enter**, the text will wrap to the next line.

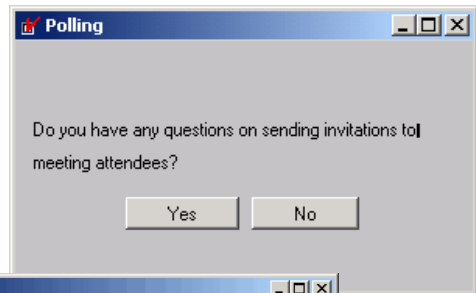
If you want to change the poll, click **Back**, make your correction, and then click **Next**.



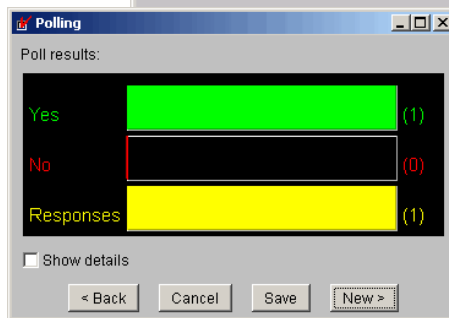
4. If you want to save your poll question, click **Save**. Specify the location and type a file name, using the default, `.poll`, for the extension.
5. To send your poll to attendees, click **Next**. The following example shows what the attendee sees.



As participants send their poll answers, the host sees the Results window, as shown in the example below.



6. If you want to save your poll results, click **Save** and then type a file name for the results. The format for the results file is plain text (`.txt`).



TROUBLESHOOTING

This section provides some basic troubleshooting information.

Third Party Security, Anti-virus and Firewall Software

It should be noted that some third party security, anti-virus or firewall suites may cause problems with connections to Web Conferencing services. Because of the variety and diversity of these third party applications, it is not feasible for Inter-Tel to maintain specific instructions on configuring each of these to work with the Inter-Tel Collaboration products.

Inter-Tel does not recommend that you disable your Security, Anti-virus or Firewall programs. However, doing so during a test period should allow you to at least rule out that product as a source of issues in connecting to the IAWC (Inter-Tel Audio and Web Conferencing) server. Should you find that by disabling your third party software connectivity issues are resolved, please contact the original vendor for further assistance in configuring their product to work with IAWC (Inter-Tel Audio and Web Conferencing).

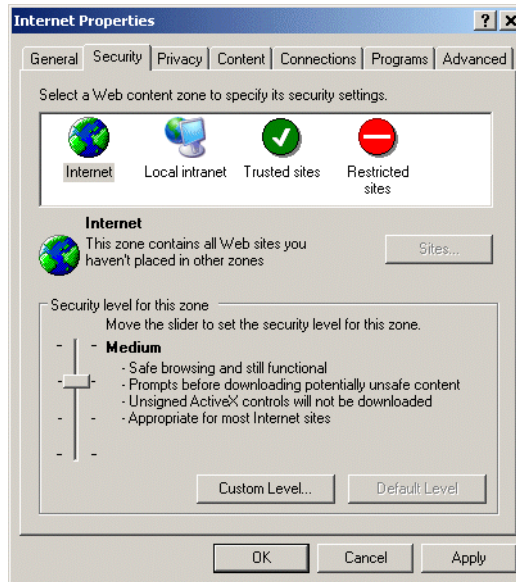
Optimize Internet Security Settings

1. Verify that the version of Internet Explorer you are running is 5.5 or greater. Within Internet Explorer click on Help and then click on About Internet Explorer. This will display the version you are running.

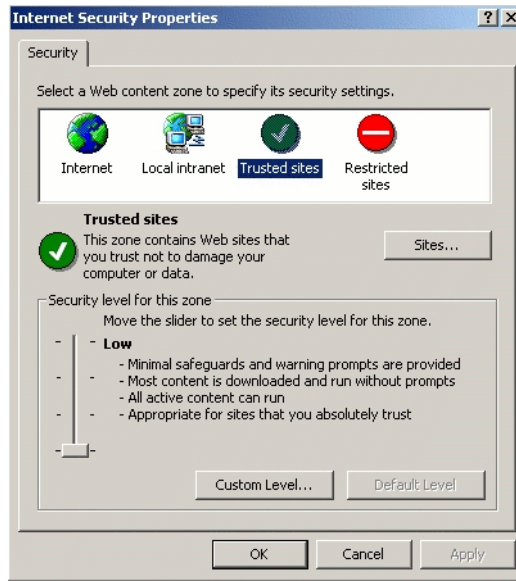


2. From Internet Explorer, go to the Tools menu and choose Internet Options (or go to Control Panel / Internet Options). Click on the Security Tab, and click the

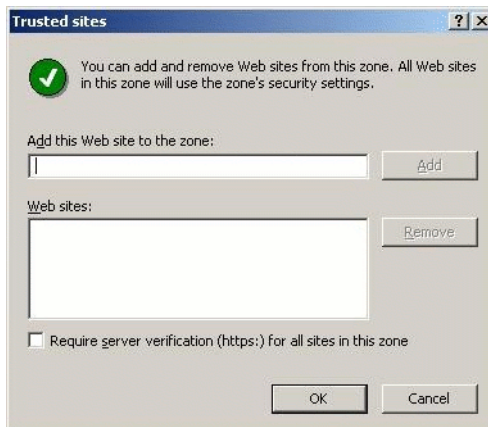
Default Level button if it is available.



- From the security tab, select “Trusted sites.” Click the Security Tab, and click the **Default Level** button if it is available

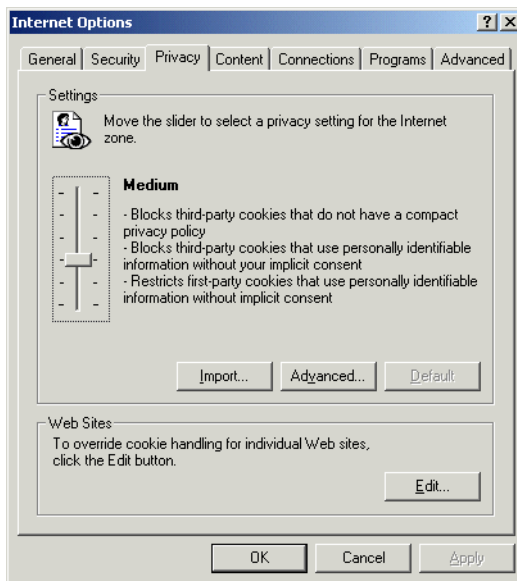


4. Click the **Sites** button. Enter the address of your Inter-Tel server, and click **Add**. You may need to clear the check box at the bottom where it says “Require server verification (https:) for all sites in this zone.”

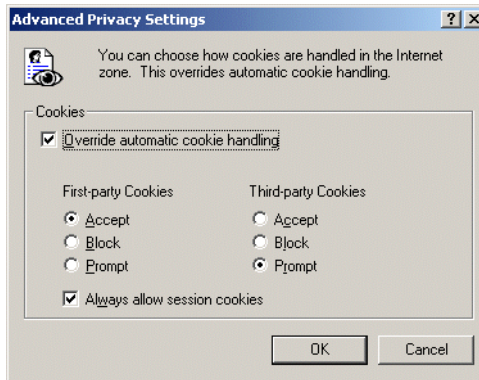


Configure Internet Privacy Settings

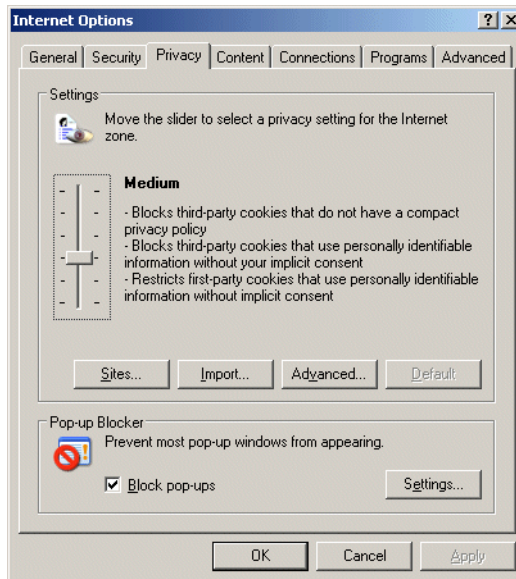
1. From Internet Explorer, go to the Tools menu and choose Internet Options (or go to Control Panel / Internet Options).
2. Go to the Privacy tab.



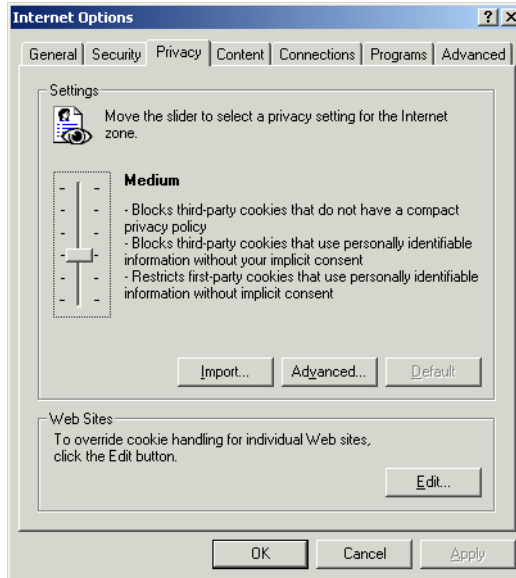
3. Click the **Advanced** button (not the Advanced tab). Set your Advanced Privacy Settings as indicated. Click **OK**.



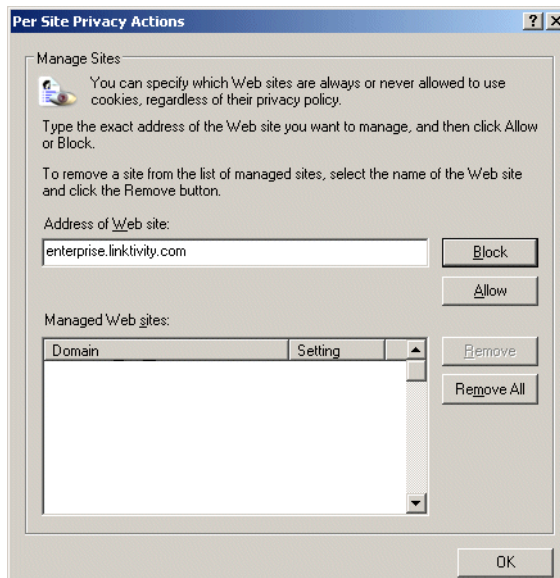
- **Windows XP Users:** If you have the most recent updates for Windows XP, you will have a Sites button on the Privacy tab. Click the Sites button to view 'Manage Sites' options.



- **Windows 2000 Users:** If you are using Windows 2000, you will have an Edit button in the lower-right corner on the Privacy tab. Click the **Edit** button to view ‘Manage Sites’ options.

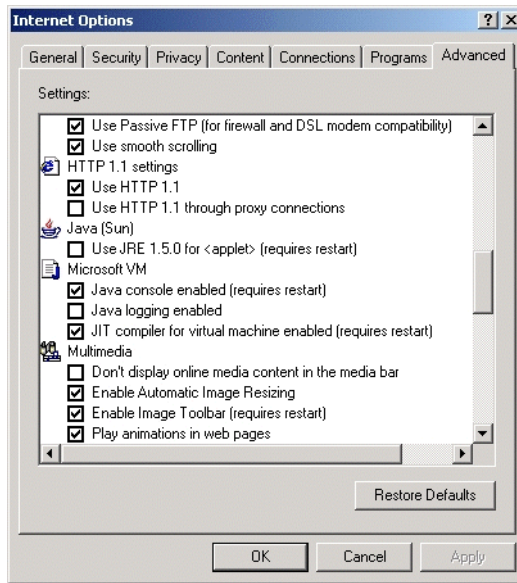


4. **Manage Sites:** You can add the Inter-Tel IAWC site as a Trusted site, which will always allow cookies to be set. To add the Inter-Tel server to your Trusted sites list, enter the address of your Inter-Tel IAWC server and click **Allow**.



Configure Default Java Environment

1. From Internet Explorer, go to the Tools menu and choose Internet Options (or go to Control Panel / Internet Options).
2. Click on the Advanced tab and locate your Java options. You will have Java (Sun) or Microsoft VM, both of these, or neither.

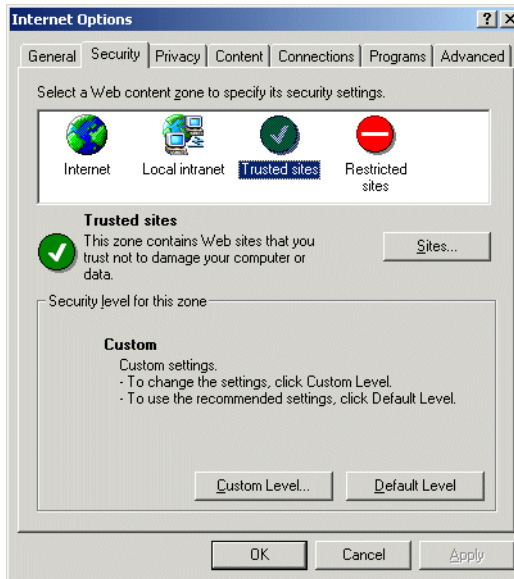


- If you do not have Sun Java or the Microsoft VM, Click Here to Download Microsoft Java (<http://www.linktivity.com/home/java/msjavx86.exe>).
- If you have the Microsoft VM and do not have Sun Java, you are all done; click OK.
- If you have Sun Java 1.4.x or higher, and not the Microsoft VM, you are done; click **OK**.
- If you have a version of Sun Java older than v1.4, please Click Here to Download Sun Java. (http://www.linktivity.com/java/j2re-1_4_2_03-windows-i586-p-iftw.exe). Uninstall the old version and replace it with the newer version.
- If both Sun and Microsoft VM – disable (clear) Sun Java, and click **OK**.

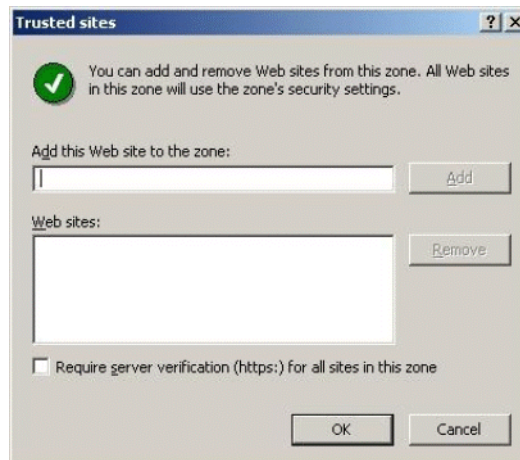
If you followed these steps from within Internet Explorer, you must exit all of your browser windows and restart Internet Explorer before joining a session.

Add a Server to Trusted Sites List

1. From Internet Explorer, go to the Tools menu and choose Internet Options (or go to Control Panel / Internet Options).
2. Click the Security tab, and then click the “Trusted Sites” icon.
3. Click the **Sites** button.



4. Enter the address of your server, and click **Add**. You may need to clear the check box at the bottom where it displays “Require server verification (https:) for all sites in this zone.” Click **OK**.



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