Inter-Tel® Web Conferencing and Remote Support

User Guide
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Getting Started

This product provides real-time communications and remote control software to enable instantaneous, browser-to-browser Web conferencing and help desk support solutions. Web Conferencing and Remote Support are separate products that can be installed and accessed through the same Web server.

Web Conferencing is a solution that allows you to generate large or small, public or private online meetings where you can interact with meeting attendees through features such as:

- Desktop and application sharing
- Videoconferencing
- Voice chat
- User polling
- Keyboard chat
- Document management
- Co-browse
- File transfer
- Record/playback
- Transparency tools

Remote Support is a Web help desk tool that makes it easier for clients to contact available customer service, sales, and support personnel. Remote Support provides tools such as:

- Desktop and application sharing
- Remote control
- System information
- System recovery
- Videoconferencing
- Reboot
- Record/playback
- Voice chat
- Transparency tools
- File transfer (bi-directional)
- Web-based queuing
- Unattended support

This chapter introduces Web Conferencing and Remote Support and includes the following main topics:

- “Version 5.0 Changes and New Features” on page 2.
- “Computer Requirements” on page 4.
- “User Interface” on page 5.
- “Add-Ons” on page 13.
- “My Office” on page 23.
- “Address Book” on page 26.
Version 5.0 Changes and New Features

The following are changes and new features for Web Conferencing and Remote Support v5.0.

- The Collaboration Client 2.0 is a next generation client, which is entirely Windows-based, eliminating the dependence on client-side Java. Collaboration Client has a flexible interface, supports Windows® Vista® and enables conference leaders to preset preference settings for collaboration controls. For more information, see “Host Console” on page 48.

- The Host Quick Reference button in the navigation pane opens a reference table that list and describes the Web Conferencing and Remote Support 5.0 menus and icons along with tips for Web conferencing.

- CSV Import/Export:
  - Allows you to import a CSV (Comma Separated Value) address book file. To access guidelines for a successful import, see page 26.
  - Allows you to export your Web Conferencing or Remote Support Address Book as a CSV file.

- ACT!2006 and ACT!2007 Plug-Ins are available for users who want to quickly start a Web Conferencing session with a selected contact or group from within the ACT! interface. For more information, see page 44.

- Keyboard Chat now supports Private Chat in a separate window. Host and participants can also engage in multiple private chat sessions simultaneously, but only with members of the current meeting. The chat icon, located in the attendee list, appears as cyan to all participants when someone is typing.

- Feature availability allow administrators to define which collaboration feature controls are available at the company level or at the user level (host and agent). For details, refer to the Inter-Tel Web Conferencing and Remote Support Administration Guide (part number 835.2990).
What's New in Web Conferencing

Web Conferencing v5.0 provides the following new functionality:

- The meeting host can customize the registration form for every registration meeting scheduled. There are a total of 15 customizable fields, including one designed for comments. For more information, see “Creating a Meeting” on page 35.
- The Registration Report updates dynamically to include the fields customized by the meeting host during meeting creation. For details see page 25.
- A new option allows you to schedule large-scale Webinar meetings with up to 250 participants. In a Webinar each participant can see and interact only with the meeting host. For large-scale Webinar meetings the meeting host can see all participants and can choose to interact with them as a group or individually. For details see “Creating a Meeting” on page 35.
- Microsoft® Outlook® Forms Templates have been enhanced to improve the user experience and to accommodate the customizable registration fields that are available during meeting creation. For more information, see page 19.

What's New in Remote Support

Remote Support v5.0 provides the following new functionality:

- The Unattended Support feature allows the Remote Support agent to gain access to a CTRL+ALT+DEL button after rebooting a remote computer with the remote user’s permission. This allows the agent to logon to the remote user’s computer without requiring further user intervention for the duration of the remote support session. For more information, see “Reboot” on page 111.
- Remote Support includes improved connection status feedback when the client joins a Remote Support session. The feedback more accurately reflects the client’s status by including a “Preparing to connect to the server” and “Locating a representative” messages. Agents can only see requests in the queue after the connection to the server is established.
- There is no longer a clipboard character limit when using the copy and paste functions during remote control. This character limit was removed for copy and paste functionality used within remote control; whether it’s in Web Conferencing or Remote Support.
## Computer Requirements

The table below lists the computer requirements for Web Conferencing hosts and users and for Remote Support agents and clients.

<table>
<thead>
<tr>
<th>Component</th>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating system</td>
<td>One of the following operating systems must be installed on the computer:</td>
</tr>
<tr>
<td></td>
<td>• Windows® 2000 with Service Pack 3 (SP3) or later</td>
</tr>
<tr>
<td></td>
<td>• Windows XP Home/Professional/Media Center with SP2 or later</td>
</tr>
<tr>
<td></td>
<td>• Windows Vista™ Ultimate/Enterprise/Business/Home Premium/Home Basic</td>
</tr>
<tr>
<td>Web browser</td>
<td>One of the following Web browsers is required:</td>
</tr>
<tr>
<td></td>
<td>• Internet Explorer® (IE) 6.0 or later</td>
</tr>
<tr>
<td></td>
<td>• Firefox® 2.0</td>
</tr>
<tr>
<td>Network Connection</td>
<td>A 256 kbps broadband network connection with 64 kbps connectivity is required (DSL, cable, or T1).</td>
</tr>
</tbody>
</table>
User Interface


NOTE

The Web Conferencing and Remote Support Web site content is distributed through Digital Certificates. If a Security Alert prompt appears, click View Certificate, and then install the certificate in the certificate repository on your computer. Doing this will prevent the prompt from appearing in the future when accessing the WCRS Web site.
Navigation Pane

The navigation pane contains the following buttons that provide access to various areas on the interface:

- **Logon/Logoff**: If you have a WCRS User ID and password, click to access your office where you have additional options. To log off of your office and return to the WCRS home page, click . See page 7 for more information about logging on and off.

- **Test Browser**: Prior to connecting to a meeting, click to run a system test that checks your browser configuration. The browser test ensures that your Web browser can connect to a Web Conferencing meeting or Remote Support session. See page 8 for instructions about running a test.

- **Public Area**: To access Public Web Conferencing meetings, documents or recordings, click . A Web Conferencing and Remote Support ID and password is not required to access this area. See page 9 for more information.

- **User Guide**: Click to access the help file for information about using Web Conferencing and Remote Support.

At the bottom of the navigation pane, you will find the current date and time and the version number of the Web Conferencing and Remote Support software running on the server.
Logon/Logoff

Click **LOGON** to access your office.

The Logon window is where registered users enter their WCRS User ID and password to access the Collaboration Office page. To automatically populate the password field when you enter your WCRS User ID, select the **Save Password** option. Click **CLEAR PASSWORD** to disable the Save Password option.

If you forget your password, click **Forgot your ID or Password?**. This opens a dialog box that allows you to recover your ID and password.

Type your e-mail address in the text box, and then click **RECOVER**. An e-mail is automatically sent to the WCRS administrator, and then your User ID and password are e-mailed to you.

**NOTE** The e-mail address you enter must be the same e-mail address you entered for your User ID.

Click **LOGOFF** to log off of your office and return to the WCRS home page.
Test Browser

The Test Browser is used to test the connectivity to the Collaboration Server and ensure that a connection can be established.

When an Attendee or Client clicks Test Browser, the Collaboration Client is automatically installed. If the Collaboration Client fails to install automatically, see “Collaboration Client” on page 13 for more information. Upon completion of the Collaboration Client install, the Connection Test displays the Connection Test results.

A user that has not logged on can run the browser test by clicking TEST BROWSER in the navigation pane on the home page. After running the test, the following message appears. If the test was successful, you can use the Web Conferencing and Remote Support features.

If the test was not successful, the following message appears.

Click Settings to open a window that allows you to enter proxy settings. See page 117 for troubleshooting information.
Public Area

Click **PUBLIC AREA** to access the Public Meetings page.

The Public Meetings page is where anyone who is given the Web address of your WCRS server can access shared documents, recordings, or public meetings. This page contains links to the following areas:

- View Public Recordings (see page 10)
- View Public Documents (see page 11)
- Install Add-ons (see page 12)

NOTE

The Agent and Queues tabs are present only if Remote Support is installed on the server.

Other documents, recordings, and meetings that are not publicly shared can only be accessed after you are logged on or if a presenter grants access.

Because meetings times are set by the host, select a time zone from the Time Zone list to have meetings times appear correctly according to your current time zone.
**Viewing Public Recordings**

The View Public Recordings link allows you to access and play public recordings.

The Public Recordings page lists all the posted recordings that are made available to the public. To play a recording, double-click the description line for the recording.

**NOTE** If you have not already installed the Collaboration Client, you are prompted to do so at this point. See “Collaboration Client” on page 13 for more information.

---

<table>
<thead>
<tr>
<th>asmith - Archived Recordings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Your Archived Recordings</strong></td>
</tr>
<tr>
<td>Host</td>
</tr>
<tr>
<td>No Archived Recordings</td>
</tr>
</tbody>
</table>

Refresh List | Check All | Clear All | Delete Checked

<table>
<thead>
<tr>
<th>Authorized Recordings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host</td>
</tr>
<tr>
<td>No Archived Recordings</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Public Recordings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host</td>
</tr>
<tr>
<td>ftest</td>
</tr>
<tr>
<td>testlab1</td>
</tr>
<tr>
<td>trishc</td>
</tr>
<tr>
<td>trishc</td>
</tr>
<tr>
<td>trishc</td>
</tr>
<tr>
<td>trishc</td>
</tr>
<tr>
<td>testlab1</td>
</tr>
<tr>
<td>testlab1</td>
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<tr>
<td>trishc</td>
</tr>
<tr>
<td>trishc</td>
</tr>
<tr>
<td>NGin</td>
</tr>
</tbody>
</table>
Viewing Public Documents

The View Public Documents link takes you to a Web page where you can click LAUNCH DOCUMENT MANAGER to access public documents that are posted to the WCRS server.

**NOTE** The first time you click View Public Documents, you will be prompted to install the collaboration client if you have not done so already.

The interface displays your computer on the left and the public folder on the server on the right. The concept of downloading files using Document Manager is similar to moving files from one folder to another in Windows Explorer, except that the left and right arrows replace drag-and-drop functionality. Only the left arrow is functional within the public area, because files can only be downloaded.

**NOTE** If you access Public Documents through the Public Area without logging in you will have read-only access to documents.

To download files, select the appropriate destination folder on your local computer, select the desired files within the public folder and then click the left arrow ⬅️ to download the selected files. The arrow turns gold during the download process.
You can hold down the SHIFT key to select multiple contiguous files, or the CTRL key to select multiple files that are not contiguous.

If you are logged in, you can also upload files. To do this, select files on the local computer, select the appropriate destination folder and then click the right arrow \( \rightarrow \) to upload the files. You can also right-click on the public folder to create a new folder underneath the public folder. Use the SHIFT and CTRL keys to select multiple files as noted above. The right arrow turns gold while files are uploaded to the selected destination folder.

To copy files to or from the Web Conferencing/Remote Support Server to your local drive, select the file or folder and then click \( \leftarrow \) to move it to the chosen location.

### Installing Add-Ons

The Install Add-ons link allows you to install the following tools:

- **Collaboration Client**: The WCRS server requires you to install Collaboration Client to ensure that your system is optimized for maximum meeting features. If the Collaboration Client is not already installed, you are prompted to install it. See page 13 for installation instructions.

- **Toolbar Plug-ins**: Intended for Web Conferencing Hosts and Remote Support Agents, this plug-in enables one-click direct access to a collaboration/support session through icons on the Windows Desktop, Start menu, and through toolbars installed in Microsoft Outlook®, Word, Excel®, and PowerPoint®. See page 14 for installation instructions. This option is only available when using Internet Explorer.

- **Microsoft Outlook Conferencing Form**: Enables the Host to create and schedule Web Conferencing meetings directly from Microsoft Outlook Calendar. Host is able to preview Attendee availability prior to sending invitations. See page 21 for installation instructions. This option is only available when using Internet Explorer.

- **ACT!2006 and ACT!2007 Plug-Ins**: Provides integration buttons that will allow the user to quickly and easily start a Web Conferencing session with the selected contact or group within the ACT! interface. See page 22 for installation instructions.
Add-Ons

This section provides installation instructions for the following WCRS Add-ons:

- Collaboration Client (below).
- Toolbar Plug-ins (see page 14).
- Microsoft Outlook Conferencing Form (see page 22).
- ACT!2006/2007 Plug-Ins (see page 14).

Collaboration Client

Web Conferencing includes the Collaboration Client which is a Windows based application that you install on your computer. The Collaboration Client offers fast, dependable access to your Web Conference meetings and meeting tools.

If the Collaboration Client is not installed on your computer, you are prompted to install it the first time you join a Web conference or remote support session, or when performing the Test Browser operation. Web conferencing hosts and attendees, and Remote Support agents and clients also need to install the Collaboration Client.

To install Collaboration Client:

1. Do one of the following to access the Collaboration Client installer:
   - From the My Office page: Click the Install Add-ons link, and then click Collaboration Client.
   - Join a Meeting: If you join a meeting and Collaboration Client is not installed, you receive a message stating that Collaboration Client must be installed or downloaded. After Collaboration Client is installed, you can join the session.
   - Run Test Browser: You cannot run the Test Browser without Collaboration Client installed. When you attempt to run the browser, you receive a messaging stating that Collaboration Client must be installed or downloaded.

NOTES

If the Collaboration Client does not install automatically, follow the instructions provided in the window and install it manually.

The Collaboration Client must be installed by an administrator to a location that all users can access when in a terminal server or a Citrix® server environment. See “Collaboration Client for Terminal Servers” on page 15 for installation instructions.

NOTE

If you are using Firefox for your browser, you must download it first before running it.
2. Click **Run** from the File Download dialog box.

![File Download - Security Warning]

Depending on where you accessed the Collaboration Client download from, either a console window or a Connection Test dialog box appears confirming a connection to the server and the installation of the Collaboration Client.

3. Click **Run** from the Internet Explorer dialog box.

![Internet Explorer - Security Warning]

![Connection Test]

Depending on where you accessed the Collaboration Client download from, either a console window or a Connection Test dialog box appears confirming a connection to the server and the installation of the Collaboration Client.
Collaboration Client for Terminal Servers

The Collaboration Client can be installed by an administrator in a terminal server or Citrix server environment, to allow all users access to it. If you are not logged on the terminal server as Administrator when installing the Collaboration Client, the following error message appears.

To install Collaboration Client for All Users:

1. Do one of the following to access the Collaboration Client installer:
   - **From the My Office page**: Click the Install Add-ons link, and then click Collaboration Client.
   - **Join a Meeting**: If you join a meeting and Collaboration Client is not installed, you receive a message stating that Collaboration Client must be installed or downloaded. After Collaboration Client is installed, you can join the session.
   - **Run Test Browser**: You cannot run the Test Browser without Collaboration Client installed. When you attempt to run the browser, you receive a messaging stating that Collaboration Client must be installed or downloaded.

   **NOTE**
   If you are using Firefox for your browser, you must download it first before running it.

2. Click **Manual Install** while connection to the WCRS server is being validated, as shown below.
3. Click **All User Install**, to start the Collaboration Client download.

4. Click **Run**, to download the Collaboration Client, and then click **Run** to launch the installation wizard.

5. Click **Next** on the wizard screen to select the destination folder for the installation.

6. The Collaboration Client must be accessible to all users on the terminal server. Leave the location as the default, and then click **OK**. Or, click **Change** to select a different location to install the Collaboration Client.

7. Click **Next**, and then click **Install** to install the Collaboration Client.

8. After the Collaboration Client finishes installing, click **Finish** to close the window.
Toolbar Plug-ins

Depending on the user type for your User ID, you can install Toolbar Plug-ins to create shortcuts for Collaboration components, as shown in the table below.

NOTE Because the Toolbar Plug-ins require Microsoft Internet Explorer for installation, the button to install them is not shown in Firefox browsers.

<table>
<thead>
<tr>
<th>Desktop Shortcut Created</th>
<th>Web Conferencing</th>
<th>Remote Support</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Admin</td>
<td>User</td>
</tr>
<tr>
<td>Collaboration Office</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Web Conferencing</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Remote Support</td>
<td>no</td>
<td>no</td>
</tr>
</tbody>
</table>

A User ID can be associated with multiple user types. If any of the user types selected for the User ID allows a shortcut type, then the launcher installation creates the corresponding shortcut. For example, if a User ID type is defined as a Web Conferencing user and a Remote Support user, shortcuts will be created for Collaboration Office, Web Conferencing, and Remote Support.

Start menu options are also installed for the shortcuts shown in the table above, plus a Settings menu option. See page 19 for details on using the Settings option.

NOTE If Remote Support is installed and if the default settings are accepted, and you have CallViewer/Callview Pro installed on your computer, the installation also creates a user button on CallViewer/Callview Pro you can use to launch a Remote Support session.
To install Toolbar Plug-ins:

1. From the My Office page, click the **Install Add-ons** link.
2. From the Install Add-ons page, click **Inter-Tel Toolbar Plug-ins**.
3. Click **Run** from the File Download box, and then click **Run** from the Internet Explorer dialog box.
4. Click **Next** from the Welcome screen.
   
   *If you accept the license terms, select **I accept the terms of the license agreement** and then click **Next**.*

   *If you do not accept the license terms, click **Cancel** to end the installation.*

5. Choose a setup type from the following:
   
   - **Complete**: Installs all launcher desktop shortcuts, and buttons to Microsoft Internet Explorer, Word, PowerPoint, Excel, Outlook, and CallViewer.
   - **Custom**: Installs any or all of the following options:
     
     o **Internet Explorer Add-in**: Adds a launch button to Internet Explorer’s toolbar.
     o **MS Office and Outlook Add-in**: Adds a launch button to Word, PowerPoint, Excel, and Outlook.

6. Click **Next**.
7. Click **Install** to begin the installation or click **Cancel** to exit without installing.
8. Click **Finish**.
To use Inter-Tel toolbar plug-ins:

1. Double-click a launcher. A logon dialog box appears.

2. Do the following to save your logon information:
   a. Type the name of a valid server in the Server box.
   b. Type N/A in the Portal Name box. This information is reserved for future use.
   c. Type your User ID in the User ID box.
   d. Type a valid password in the Password box.
   e. If you want to use an LDAP server for user authentication, enter the server information in the Auth Server box.

3. Click Save. The information is saved and is used each time you want to launch an plug-in.
If you previously selected the **Save Password** option and later change your password using the **Edit My Profile** option on the Office page, you will need to update the shortcut.

**To change your password on the Toolbar Plug-in:**

1. From the Start menu, select **Programs - Inter-Tel Collaboration - Settings**. The settings screen appears.

2. Select **Clear Settings**, and then click **SAVE**. The Logon screen appears.

3. Type the information (as you did in step 2. on page 19), and then click **LOGON**.

After you log on using the shortcut, the destination for each Inter-Tel Toolbar Plug-in or Start menu shortcut is as follows:

- **Collaboration Office**: Opens your office page. If you log on as the administrator or superadmin, you will have access to administration options.

- **Web Conferencing**: Opens the Web Conferencing Host console, ready for you to invite meeting participants. The main browser page does not open with this launcher.

- **Remote Support**: Opens a Remote Support console, ready for you to invite a participant or accept a queue request. The main Collaboration browser page does not open with this launcher.

- **Settings** (on the Start menu): Allows you to update your user ID, password, or server setting for the shortcuts described above.
Microsoft Outlook Conferencing Form

This form enables the Host to create and schedule Web Conferencing meetings directly from Microsoft Outlook Calendar. The host is able to preview attendee availability prior to sending invitations.

Before installing the Microsoft Outlook Conferencing Form (if you have not installed any other forms), you will see two tabs. After the Conferencing Form is installed, a Web Collaboration tab appears.

To install the Microsoft Outlook Conferencing Form:

1. While in your office page, click the Install Add-ons link.
2. While in the Install Add-ons page, click the Microsoft Outlook Conferencing Form icon.
3. Click INSTALL and follow the instructions.
ACT! 2006/2007

This feature provides integration buttons so you can start a Web Conferencing session with the selected contact or group within the ACT! interface.

To install ACT! 2006/2007:

1. While in your office page, click the Install Add-ons link.
2. From the Install Add-ons page, click the ACT!2006 and ACT!2007 Plug-Ins link.
3. Click Run from the File Download box, and then click Run from the Internet Explorer dialog box.
4. Click Next from the Welcome screen.
5. If you accept the license terms, select I accept the terms of the license agreement, and then click Next.
   If you do not accept the license terms, click Cancel to end the installation.
6. Click Install to begin the installation.
7. Click Finish.
My Office

After you log on to the Web Conferencing and Remote Support server, you are presented with the My Office page. The My Office page lists all the Web Conferencing meetings on this server that you are authorized to attend, such as any Web Conferencing public meetings or private meetings that you have been invited to attend. You can view the schedule by day, week, month, or all.

This page also displays tab pages for Remote Support Agents and Queues (if Remote Support is installed on your server).

If you have logged on as administrator or as superadmin, you will have access to the Administration Configuration pages\(^1\); otherwise, the ADMINISTRATION button is not displayed.

Based on which products are installed on the WCRS server and the user’s privileges, the server displays the buttons for the Web Conferencing and/or Remote Support features.

To return to your office at any time, click MY OFFICE from the Navigation Pane.

1. Refer to the Inter-Tel Web Conferencing and Remote Support Administrator Guide (part no. 835.2990).
Edit My Profile

The Edit User page allows you to change account information such as password, name, e-mail address, and other user information. Required fields are indicated in red, as shown below.

### Edit User

**Change User Profile Here**

<table>
<thead>
<tr>
<th>User Information</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>Loran</td>
</tr>
<tr>
<td>First Name</td>
<td>Loran</td>
</tr>
<tr>
<td>Last Name</td>
<td>S.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>123-1234</td>
</tr>
<tr>
<td>Fax Number</td>
<td>234-2345</td>
</tr>
<tr>
<td>Password</td>
<td></td>
</tr>
<tr>
<td>Confirm Password</td>
<td></td>
</tr>
<tr>
<td>E-mail</td>
<td><a href="mailto:lorans@test.com">lorans@test.com</a></td>
</tr>
<tr>
<td>E-mail Delivery Option</td>
<td>Conference Server</td>
</tr>
<tr>
<td>Local Time Zone</td>
<td>Arizona</td>
</tr>
<tr>
<td>Time Display Format</td>
<td>MM/DD/YYYY HH:MM (24 Hour)</td>
</tr>
</tbody>
</table>

There are two options for E-mail Delivery: Conferencing Server (default) and User’s E-mail Client.

### Conferencing Server

Reasons to select the Conferencing Server option include:

- You have only Web-based mail. For example, if you do not have Microsoft® Outlook®, EUDORA™ or another e-mail program that works with the Mailto function (Yahoo!®, Google™ Gmail, etc. will not work with the Mailto function). The Mailto function operates by opening a new message window when you click on an e-mail address link. The e-mail address appears in the “To” field.
- You use the default meeting e-mail notification and prefer to allow the conferencing server to handle the e-mails.
- You use the new “import contacts” to Address Book feature.

### User’s E-mail Client

The User’s E-mail Client option allows you to choose your own e-mail server to send Web Conferencing meeting notifications. If you want to use your own mail client rather than the Conferencing server, verify whether your current mail server can use the Mailto function.

**NOTE**

If your user profile is set up using User’s Email Client instead of Conferencing Server, you need to manually create and send meeting cancellation notices. If your account was set up to use the mail client that was included with Web Conferencing server, the Meeting Cancellation e-mail is sent automatically.
My Reports

You can use the My Reports page to run reports by the day, week, month or date ranges on Web Conferencing meetings and Remote Support sessions.

Remote Support Reports
- Customer Statistics: Shows the average wait time for a customer to be handled, before they send an e-mail, or before they abandon their request.
- Rep Statistics: Shows the average session length, number of sessions per day, and the queues for each agent or representative.
- Customer Activity: Shows the total number of inbound requests canceled, e-mailed, abandoned, and handled for the date or for the date range requested.
- Representative Activity: Shows the time available, time in sessions and total number of meetings for each agent or representative.
- Remote Support Inbound Requests: Shows the total number Inbound requests for the date or for the date range requested.
- Unanswered Requests: Shows the total number of unanswered requests for the selected queue and date or for the date range specified.

Web Conferencing Reports
- Session Activity: Shows the total number of meetings and participants for the requested date or date range specified.
- User Activity: Arranged by user, shows the meeting number, meeting name, start time, end time, duration and number of participants for the date or for the date range specified.
- Meeting Registrations: If you create a meeting that requires the participants to register, this report shows who has registered to attend your meeting(s). If you added custom fields to the Registration Page then those custom fields also appear in this report. You can also run this report later after the event takes place so that you can distinguish between registrants who attended and those who did not. To do this, run the report after the event and select Only Show Attended.
GETTING STARTED

Address Book

Clicking the Address Book button opens your personal Web Conferencing or Remote Support address book.

Asmith - Address Book

Search Specification

<table>
<thead>
<tr>
<th>Enter Partial Text</th>
<th>Search In</th>
<th>Name</th>
</tr>
</thead>
</table>

New Contact

Import CSV File

Export CSV File

Select Name | Phone | E-mail | Company | Action |
------------|-------|--------|---------|--------|
Mckayla Byers | 111-2222 | mbyers@alltran.com | Mckayla Fi | Edit |
Shance Neely | 222-3333 | sneely@alltran.com | New News | Edit |
Lyndsea Handy | 123-4567 | handy@alltran.com | Ace Cards | Edit |
Duke Brigham | 333-2345 | db Brigham@alltran.com | University | Edit |
Clarence Eving | 123-1234 | ceving@ice.com | Blue Skys | Edit |
Lenny Metzer | 456-9789 | metzer@bar.com | Lenny's Ba | Edit |
Janet OverStreet | 234-2345 | overstreet@yoma.com | Overstreet | Edit |

Check All | Clear All | Delete

The Search Specification area allows you to find a person in your personal address book by their Company, E-mail address, Name or by their Phone Number.

You can do the following in the address book:

- **Search**: Use the Search button to find a person in your personal address book by their Company, E-mail address, Name or Phone Number.

- **Add a contact**: Click the New Contact icon. Type the appropriate information in the dialog box and click OK. The contact is added to the address book.

- **Import or export CSV (Comma Separated Value) File**: Allows you to import CSV files to and export CSV files from your address book. See page 27 for more information.

**NOTE**

The import and export options appear only when you launch the Address Book from the left navigation bar. If you launch the Address Book after selecting the_invite_ button from the host or agent console, you will not see the import and export options, though you will see the option to add new users manually.
Importing CSV Files

You can import contact information from your other address books, for example, Microsoft Outlook, if your address book can export its’ contact information to a CSV (Comma Separated Values) file. The following are rules for creating a CSV that can be imported into your Web Conferencing Address Book.

- The First line of the CSV file is a header line, for example, “Name”, “E-mail”, “Phone”, “Company”

The following Header names are supported: Name, E-mail, Phone, Company, First Name, Last Name, E-mail Display Name, Business Phone. You can view and edit your CSV file using any editor. The following illustration is an example of a CSV file that would be imported correctly:

- Pairs of double quotes are used around the data, and commas are used to separate each data item. For example, “My name”, “My@email.address”, “My-phone-number”, “My company name”

- Commas are allowed within the pairs of double quotes. For example, “Last, First”, “my@email.address”, “My-phone-number”, “My company, Inc.”

- A name and e-mail address are necessary for a record to be imported; all other data is optional for the import to work.

- Hard line breaks within the data may cause the import to fail.

- Some CSV files exported from other applications may not contain pairs of double quotes when there is no data in that field. Web Conferencing handles this situation when performing the import.

Refer to the “Tina Brahm” example in this CSV file that shows the minimum data required (Name and E-mail) for a valid CSV import.

The “Tina Brahm” example is valid and will be imported without double quotes for the Phone field and with blank values for both the Phone and Company data.
Exporting Your Address Book Using a CSV File

To export your Web Conferencing Address Book to a CSV file, click the Export CSV File icon. A dialog box appears that tells you must right click the SAVE link in the dialog box if you want to save your exported CSV file. This example shows how to Save when using Internet Explorer. The menu option for Save may be slightly different when using other browsers.

Right click the SAVE link and select the option that allows you to save the CSV file.
The Save As dialog box displays the name given to the CSV file by the Web Conferencing server. You can rename the CSV file name to a user friendly name.
Web Conferencing

This chapter of the user guide includes the following information about Web Conferencing:

• “Meeting Basics” below
• “Host Console” on page 48
• “Host Control” on page 59

Meeting Basics

This section discusses meeting basics such as meeting security, joining a public or private meeting, creating meetings, and canceling meetings.

Meeting Security

The Web Conferencing product has been designed with five levels of meeting and Web Server security, including:

• **Meeting Passwords**: This option can be set when a user creates or schedules a meeting.

• **Public and Private Meetings**: A user has the ability to create either public accessible or private (e-mail invitation) meetings.

• **SSL Web Server**: Both the Web Conferencing and Remote Support server can operate on a secure SSL Web server. When running Web Conferencing or Remote Support on an SSL server, the interface uses the HTTPS (SSL) protocol (instead of HTTP). Examples of the user interface are the Web Conferencing Host and Client consoles, the Remote Support host and client consoles, the Office page, Logon page, etc.

• **Dynamic 128-bit data encryption during a meeting**: Any meeting created with a password is automatically encrypted. If you create a meeting without a password, the host can turn on encryption by using the Lock icon in the attendee list.

• **Lock Meeting**: While in a meeting, at any time, you can click the door icon on the attendees tab of the Host console to prevent additional participants from joining. The icon will change to a closed door to indicate the meeting is locked. Clicking on the closed door icon changes the display to the open door icon, indicating additional participants may join.
Meeting Tasks

This section of the user guide provides guidelines and instructions for meeting tasks.

Joining a Public Web Conference

Registered and non-registered Web conferencing users may join a public meeting through the WCRS server’s “Public Area.”

To access a meeting, the Collaboration Client must be installed on your computer. If it is not installed, you are prompted to install the Collaboration Client applet when you join a meeting for the first time. All Web conferencing content is distributed through Digital Certificates.

When joining a public meeting, depending on meeting type, one of the following may occur:

- When joining a password-protected public meeting, the participant is prompted for the password.
- When joining a Webinar meeting, the participant is required to fill in additional information other than their name. A password may or may not apply.
- When joining a registration meeting, the participant must register first. This cannot be accomplished through the “Join Meeting By Number” option.

NOTE: If a Security Alert prompt appears, click View Certificate, and then install the certificate on your computer. This will prevent the prompt from appearing in the future when accessing this Web site.
To connect to a public Web conference:

1. Click \( \text{PUBLIC AREA} \). The Public Meetings page appears.

2. Join a meeting by doing one of the following:
   - Click \( \text{Join By Meeting Number} \). The Join Meeting page appears. Type the session number in the box, and then click \( \text{Enter} \).

   **NOTE**
   When the Action shows \( \text{Register} \) instead of \( \text{Join} \), the meeting host selected that all attendees must register before entering the meeting. Upon submitting your registration form online, you will be sent an e-mail with the meeting link.

   - Join a meeting by doing one of the following:
     - Click \( \text{Join By Meeting Number} \). The Join Meeting page appears. Type the session number in the box, and then click \( \text{Enter} \).
• Click **Join** to enter the selected meeting. Type your name in the box and click **Enter**.

![Join a Public Meeting](image)

• Accept an invitation sent to you by a meeting Host.

The Client console opens and allows you to participate in the meeting. After you join the conference, you can exit at any time by closing the Client console. See “Client Console” on page 46 for additional details about using the Client console.

---

**NOTE**

If this is your first time joining a Web conference, you are prompted to install the Collaboration Client if you have not done so already. This client is required in order to connect to a Web conferencing meeting. For details, refer to “Collaboration Client” on page 13.
Creating an Instant Meeting

If you are logged in to the WCRS server, you can start an instant meeting. To log on to the WCRS server, see “Logon/Logoff” on page 7. Keep in mind, others can only join this meeting if they have been given the session number.

To create an instant meeting:

Click START NOW from the Navigation pane.

The Host Console appears. You can invite participants or they can join using the session number.

Creating a Meeting

Through the WCRS server you can create and schedule meetings, both public and private.

To create a meeting:

1. From the left navigation pane, click CREATE MEETING. The Create Meeting page appears.
2. On the Meeting Details tab, complete the following information:

- **Meeting Name**: Type a name that will help attendees identify the event.
- **Type**: Select a meeting type. Options include:
  - **Public**: A public meeting allows any user to attend. This option is selected by default.
  - **Private**: Clear the Public check box to make a meeting private. Private meetings require an invitation to join and are not displayed in the public area.
  - **Webinar**: A Webinar provides the most efficient way to hold large meetings (up to 250 participants). The host can see all the attendees of a Webinar in the Attendee List but all attendees in a Webinar will only see themselves and the host in their Attendee List. This increases meeting performance and prevents chatting between attendees which cuts down on Web traffic.

**NOTE**: Webinar meetings can be public or private. If registration is required, the meeting must be public.

- **Registration Page**: This option requires participants to complete an online registration form before they can enter a meeting. The registration option is only available for Public meetings and Webinars. When you select the Registration Page option, the Registration tab appears on the Create Meeting page. From the Registration tab, select the information that you want to appear in the online registration form. Then click the Meeting Details tab to complete the remainder of the details.
• **Description**: Type information you want to provide about the meeting in the Description text box.

• **Date**: Click the calendar icon to open the calendar. Click ◀ and ▶ to scroll to other months. Select the date you want for the meeting.

---

**NOTE**

Web conferencing does not allow you to schedule a meeting on a date and time that has already passed.
• **Time**: Select one of the following:
  
  o **All Day Meeting**: If you select All Day Meeting, your meeting will run all day on the selected date.
  
  o **Timed Meeting**: If you select Timed Meeting, you will need to select the following:
    
    **Start Time**: When the meeting is scheduled to begin.
    
    **Duration**: The length of time the meeting is scheduled to last.
    
  o **Allow users to join**: Select when participants can join the meeting before the start time. Select one of the following:
    
    – 0 Minutes
    – 15 Minutes
    – 30 Minutes
    – 45 Minutes
    – Any Time (default)

3. If desired, click the **Options** tab to select additional meeting options.
Options include:

- **Send e-mail invitations** *(appears only if you are using the Conferencing Server)*: This option, selected by default, sends an e-mail invitation to the added e-mail addresses for the meeting attendees within the E-mail Addresses box.

- **E-mail Addresses** *(appears only if you are using the Conferencing Server)*: Add the e-mail addresses for the meeting attendees using one of the following methods:
  - If the attendee e-mail address is contained in your contact list, click [ADDRESS BOOK], add a check mark for each person you are inviting, and then click **INVITE**.
  - Type the e-mail address for each attendee on a separate line, pressing **ENTER** after each entry.

- **Password**: You can add additional meeting security by setting a meeting password to restrict access to your meeting to only those who know the password. To set a password for your meeting, type the password in the text box.

  The password is encoded unless you select the **Show Password in e-mail** check box, which then displays the password in plain text. Because the e-mail invitations are not secure, it is recommended the host communicate the password through another means (separate e-mail, call etc.).

- **Attachment**: The attachment option allows you to add a file to the invitation sent to the attendees. To add an attachment, type the path and filename in the text box or click **Browse** to locate the file. The maximum size for the attached file is 200K.

- **Teleconference Number**: You can verbally communicate during your Web conference through a conference call. The attendees can see your meeting on their computer and all verbal communication is by phone. Type the phone number for the teleconference number in the text box.

- **Teleconference Password**: Type a password to connect to the Teleconference in the text box.
• **Recurring Meeting:** If the meeting is a recurring meeting, select the check box to show additional options.

Schedule the recurring meeting using the following options:

- Ends after <number> occurrences.
- Ends by (mm/dd/yyyy).
- Every ___ day(s).
- Every weekday.

While in a meeting, at any time, you can click the door icon in the host attendee list of the Web conferencing meeting interface to prevent additional participants from joining. The icon will change to a closed door to indicate the meeting is locked. Clicking on the closed door icon changes the display to the open door icon, indicating additional participants may join.
Scheduling a meeting with the Outlook Conferencing Form

The Outlook Conferencing Form allows the host to create and schedule Web conferences directly from Microsoft Outlook Calendar. This feature also allows the host to preview attendee availability prior to sending invitations. The Microsoft Outlook Conferencing Form add-on must be installed prior to scheduling a meeting. To install the add-on refer to “Microsoft Outlook Conferencing Form” on page 21.

To schedule a Web conference:

1. Open your Outlook Calendar, and then select to create a new Meeting Request.
2. Select the Appointment tab. On the Appointment page, complete the following information:
   - Select the Start time and End time for the meeting
   - Type a Subject and Location in the boxes
   All other fields are for notation in Outlook; you can fill them in but they are not required when creating a Web conference.

3. Select the Web Collaboration tab. On the Web Collaboration page, complete the following information:
   - Type the Server URL in the box. This is the same as what is shown in your Web browser Address bar, the WCRS server home page.
   - Type your Web Collaboration logon user ID in the Username box.
   - Type your Web Collaboration logon password in the Password box.

**NOTE** The Portal box information is for future use. Leave it blank.
4. Click **Login for Meeting Information** to connect to the WCRS server.

5. Type a name in the **Meeting Name** box and then enter any additional meeting information, such as a description or meeting password. Refer to “Creating a Meeting” on page 35 for descriptions of meeting information.

**NOTE** By default, **Public** is selected for Meeting Type. Clear the **Public** check box to make the meeting private.

6. Click **Schedule** to schedule the Web conference meeting. To see whether the meeting was successfully created, the Status bar displays “Conference scheduled successfully.”

![Image of login and scheduling interface]

Clear check box to make meeting Private
7. Select the **Appointment** tab to display the meeting information. This is the same information that is sent in meeting invitations.

8. Select **To**, and then type the people to invite to the Web conference using your Outlook calendar. After you send the invitation, the meeting appears in your Outlook calendar.
Using the ACT! 2006 or 2007 Plug-in

The ACT! 2006 and 2007 Plug-ins provide integration buttons that allow you to quickly and easily start a Web conference with the selected contact or group within the ACT! interface.

**NOTE**
To use this option, you must first have ACT! 2006 or 2007 installed on your computer before installing the ACT! 2006 or 2007 Plug-in.


**NOTE**
ACT!2006 is not compatible with Microsoft Vista.

When installed, the ACT! plug-in shows Collaboration Office, Web Conferencing and Settings in the ACT! main menu bar. This provides the functionality to start a Web Conference, log on to the Web Collaboration home page, and to store WCRS server logon credentials.

- To save your WCRS server logon credentials, click **Settings**.
- To log on the WCRS server home page using your saved credentials, click **Collaborate Office**.
- To start a Web conference with the selected group or contact in the ACT! interface, click **Web Conferencing**.
Canceling or Editing a Meeting

Through the WCRS server, you can cancel a scheduled meeting. For recurring meetings, you have the option to cancel a single occurrence or the series of meetings.

### To cancel a meeting:

1. Open the My Office page. By default, the My Office page opens to the Daily tab so you can view the current date, and meetings scheduled that day. If necessary, change the date or select another tab to find the meeting you want to cancel.

2. Click **Edit** next to the meeting you want to cancel. The Create Meeting page appears.

3. Click **CANCEL MEETING** at the bottom of the page, and then click **OK** when prompted to confirm.

### To cancel a series of recurring meeting:

1. Open the My Office page.

2. Find the meeting you want to cancel, and then click **Edit** next to the meeting. The Create Meeting page appears.

3. Click **CANCEL SERIES**, and then click **OK** when prompted to confirm. The meeting and all occurrences are deleted.

### To edit a meeting:

1. Open the My Office page.

2. Find the meeting you want to make changes to, and then click **Edit** next to the meeting. The Create Meeting page appears.

3. Change any meeting attribute, except for the date. If the meeting selected to edit is recurring, it must remain a recurring meeting.
Client Console

When you are an attendee at a Web conference, you connect to the conference through the Client console. The Client console allows you to participate in a Web conference and provides a limited feature set of the Host console.

The default Client console includes the following:

- **Attendees tab**: Shows the host and participants in the current Web conference. The host name appears in red text in the attendee list.

- **Chat tab**: Allows you to chat with the host or other attendees of the Web conference. To chat with participants, type your comments in the text pane. Press **Enter** on your keyboard to send your message.

The following also appears on the Attendees tab:

- **Options button**: Click this button to access the following options:
  
  - **Properties**: Shows the properties (screen resolution, OS, Version) of a selected attendee.
  
  - **Private Chat**: A conference participant can have a private chat with one or more attendees. Select the check box next to the attendee name, and then select the option from the list.
  
  - **Select All**: Allows you to select the check box all attendees in the meeting.
  
  - **Deselect All**: Allows you to clear all selected attendees in the meeting.
• **Meeting buttons**: These buttons allow you to interact with the host and other attendees. The following buttons are available:
  
  - *Raise your hand*: Select this icon 🎤 to ask the host a question.
  - *Thumbs up*: When asked a question, select this icon 🤚 if you agree.
  - *Thumbs down*: When asked a question, select this icon 🕳️ if you do not agree.

• **Meeting icons**: The chat icon 📨 appears when the meeting participant is in a keyboard chat. The icon changes color when the participant is typing.

The Client console changes and additional buttons and icons appear when the desktop of an attendee is being shared or broadcast. For more details, see “Broadcast Attendee Desktop” on page 83.

![Meeting buttons and icons](image)

• **Meeting buttons**: These buttons are available when an attendee is sharing their desktop. These buttons are active when the check box next to the name of a participant is selected.
  
  - *Remote control*: The selected participant has control of the desktop being shared. Click the 🖥️ button to allow the selected participant remote control. Click the button again to take back control.
  
  - *Desktop Sharing tools*: Click 🖥️ to allow the selected participant to use the Viewer tools such as whiteboarding. Click the button again to take away the feature.

• **Meeting icons**: These icons provide information to attendees in the meeting.
  
  - *Remote control*: This icon 🖥️ indicates the participant has remote control of the desktop being viewed.
  
  - *Desktop sharing*: This icon 🖥️ indicates which participant’s desktop is being viewed.
  
  - *Desktop tools*: This icon 🖥️ indicates the participant can use desktop tools, such as transparency tools.
Host Console

As the host, you control and monitor the Web conference through the Collaboration Client Host console interface. The Host console consists of the following:

- **Menu bar**: Allows you to set preferences, invite participants, use the recorder, and access online Help (see page 52).
- **Host controls**: Allows you to use desktop sharing, application sharing, videoconferencing, polling, file transfer, Document Manager, and Co-browse features (see page 59).
- **Attendees tab**: Provides a list of users attending the Web conference (see page 49).
- **Chat tab**: Allows conference participants to communicate via text message. (see page 51).

The default Host console opens to display the Attendees tab, and then changes when additional features are selected. The example below shows an expanded Host console after several features are selected.
A window can be split into sections, which are called panes. The Host console contains two or more panes with icons, check boxes, or other controls specific to its function. By default, the Attendees and Chat panes are always available, and other panes appear depending on the features that are active. Panes other than the Attendees and Chat panes, have a \(\times\) icon in the upper right corner, which allows the host to close that pane. The pane can also be closed by clicking the active feature in the host controls, which turns the feature off. After the feature is turned off, the icon changes back to the default color.

When a Web conference starts, the default Host console appears. After selecting a Web conferencing feature, it appears in one of the following three ways:

- Adds an additional pane for Application Sharing, Video or Polling.
- Adds an additional toolbar for Voice Chat or Recorder.
- Opens a separate window for Desktop Sharing, File Transfer, Document Manager, Co-browse, and Private Chat.

### Attendees Tab

The Attendees tab displays the list of attendees in the Web conference. Select the check box next to the attendee name to provide additional options, such as Private Chat.

| NOTE | An * (asterisk) next to a name indicates the attendee is not logged on to the WCRS server as a user. |

Above the attendee list are the following security feature buttons:

- **Lock Conference**: While in a conference, click \(\text{padlock}\) to close the meeting and prevent additional attendees from joining. The button changes to \(\text{unlock}\) when the meeting is closed. Click the button again to open the conference and allow additional attendees to join.

- **Encrypt Conference**: A conference can be secured using a dynamic 128-bit data encryption. While in a conference, click \(\text{padlock}\) to encrypt the meeting. The button changes to \(\text{_unlock} \) indicating the meeting is encrypted. Click the button again to clear encryption.
During a meeting you can respond to a status (raised hand or chat), and enable or disable controls using the meeting buttons at the bottom of the Attendees tab. You must select the check box next to an attendee for meeting buttons to become active. Click the button to enable or disable the feature for an attendee. The meeting buttons include:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="Hand.png" alt="Hand Icon" /></td>
<td>Click this button to acknowledge the attendee or answer their question. See “Polling” on page 73.</td>
</tr>
<tr>
<td><img src="Screen.png" alt="Screen Sharing Icon" /></td>
<td>When you select screen sharing from the host controls, and then click this button, it allows a selected attendee to have remote control your desktop. See “Giving Meeting Control to an Attendee” on page 81.</td>
</tr>
<tr>
<td><img src="Desktop.png" alt="Desktop Sharing Icon" /></td>
<td>Click this button to allow an attendee to use Desktop Sharing tool when screen sharing is selected. See “Desktop Sharing” on page 60.</td>
</tr>
<tr>
<td><img src="Microphone.png" alt="Voice Chat Icon" /></td>
<td>Click this button to allow an attendee use of the Voice Chat feature, if they have a microphone connected to their computer. See “Voice Chat” on page 69.</td>
</tr>
<tr>
<td><img src="Camera.png" alt="Video Icon" /></td>
<td>Click this button to allow an attendee use of the Video feature if they have a camera connected to their computer. See “Video” on page 53.</td>
</tr>
</tbody>
</table>

Meeting icons appear next to the name on the attendee list, including the host, and indicate status or controls. The icons relate to meeting buttons you selected, as described in the previous table. The following are meeting icons that could appear on the Attendee tab:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="Hand.png" alt="Hand Icon" /></td>
<td>The attendee has raised their hand to ask a question or to get your attention. Either a “thumbs up” or &quot;thumbs down&quot; icon can appear in this location instead of a raised hand.</td>
</tr>
<tr>
<td><img src="Chat.png" alt="Chat Icon" /></td>
<td>Appears when a participant is in a keyboard chat. See “Chat Tab” on page 51.</td>
</tr>
<tr>
<td><img src="Screen.png" alt="Screen Sharing Icon" /></td>
<td>Appears next to a participant name and indicates that their desktop is being shared. Often it is your (host) desktop that is being shared but it can also be an attendee. See “Broadcast Attendee Desktop” on page 83.</td>
</tr>
<tr>
<td><img src="Desktop.png" alt="Desktop Sharing Icon" /></td>
<td>Indicates the participant with control of the shared desktop. The icon will not appear when you are sharing your desktop and also have control of it.</td>
</tr>
<tr>
<td><img src="Microphone.png" alt="Voice Chat Icon" /></td>
<td>Indicates that the attendee can use the Desktop Sharing tools.</td>
</tr>
<tr>
<td><img src="Microphone.png" alt="Voice Chat Icon" /></td>
<td>Indicates a participant can use voice chat if a microphone is connected to their computer.</td>
</tr>
<tr>
<td><img src="Camera.png" alt="Video Icon" /></td>
<td>Indicates a camera is connected to the participant’s computer, which allows them to use the video feature. If a camera is not detected and the feature is enabled, the icon appears with a red X.</td>
</tr>
</tbody>
</table>
Chat Tab

The Chat feature allows the host and attendees communicate by text messages during a Web conference, using their keyboards. To access Keyboard Chat, click the Chat tab.

At anytime during a Web conference session, the host can clear the chat history. Selecting this option clears the keyboard chat history on the WCRS server up to the time when it is selected. The chat message box is empty (blank) for any attendee that joins a chat session after Clear Keyboard Chat History is selected. The chat message box is not cleared for those attendees already in the chat session.

To clear chat history:

Click Options on the Attendees tab, and then select Clear Keyboard Chat History.

The host can select one or more attendees to have a Private Chat conversation where only the selected attendees will see the host chat. However, when an attendee responds to the host in a chat only the host sees that dialog. The attendees in the Private Chat do not see the other attendees’ chat messages.

To have a private chat:

1. Select the check box next to the attendee on the Attendees tab that you want to chat with privately.
2. Click Options, and then select Private Chat.
Menu Bar

The Host console has a menu bar for Web conferencing options and features. The following are available on the menu bar:

- **Preferences**: Click to display the Preferences window. Changes to these settings affect the current session, as well as, future sessions. For details about setting preferences, see page 52.

- **Invite**: Click to open the Collaboration Client window. In this window you type (or select from address book) attendee e-mail address for the current session. See “Invite” on page 54.

- **Recorder**: Click to toggle between show or hide the Recorder feature. See “Recorder” on page 55.

- **Help**: Click to open the Web Conferencing and Remote Support online Help.

Preferences

Web Conferencing user preferences are accessed from the menu bar in the Host console. When you change settings through Preferences, the changes are applied to the Web conferencing session you are currently hosting (unless the feature is active) and for future sessions. Select your preferences, and then click **OK** to apply the changes.

Screen Sharing

The following settings appear on the Screen Sharing tab.

- **Start-up Settings**: These settings change the way Screen Sharing appears when selected.
  - **Colors**: Select 256 Colors, High Color (16 bit) (*default*), or True Color (24 bit) to adjust color quality on your monitor.
  - **Scan Rate**: Select Low, Medium (*default*), or High to adjust the refresh rate of your monitor.
  - **Skip initial dialog box**: When **Always start with** is selected, the Sharing Mode Selection dialog box is not displayed whenever you select Screen Sharing from the host controls. The sharing type will automatically open to Desktop Sharing or Application Sharing. By default, the initial dialog box is displayed.

- **Hide from participants view**: Only the selected items are displayed to all attendees. By default, all the items are selected.
Video

The following settings appear on the Video tab under Start-up Settings to adjust the viewing quality of video.

- **Frames/Sec**: Select a frames per second speed from the list (default is 4).
- **Quality**: Select from Good, Better (default), or Best.
- **Raw Image Size**: Select either 176x144 pixels or 352x288 pixels (default).
- **Audio**: By default, **Start Voice Chat automatically when Video is initiated** is selected, which starts and stops Voice Chat audio with Video.

Files

The following setting appears on the Files tab. Select **Always start with**: to skip the initial dialog box for file sharing, and then select either **File Transfer** or **Document Manager** as your preference. By default, the initial dialog box is displayed that prompts you to select either File Transfer or Document Manager.

Playback

The following settings appears on the Playback tab for video playback options.

- Select either **Broadcast** (default) or **Preview**.
- Select **Loop continuously** to repetitively show the playback video. By default, this option is cleared.
Record

The following settings appears on the Record tab.

- **What to record**: Records and saves files associated with the selected features. By default, all of the features available to you are selected.

- **Save recording to**: Sets the location where the recordings are saved.
  - **My PC**: Select either Save a recording to a new file or Append a recording to an existing file, locally on your computer. By default, the recording is saved locally to a new file.
  - **Collaboration Server**: Saves a recording to the WCRS server. When a recording is saved to the server, you can specify who has access to the file. Select Limit Access, and then type the e-mail address of those you want to allow access to the recording in the box.

Proxy Settings

The Proxy Settings tab **Use proxy server** option allows you to type an IP address and port number for the proxy server that the Collaboration Client is using to connect to the WCRS server. By default, this option is cleared.

Invite

The Invite button on the Host console menu bar opens a dialog box to send out a meeting invitation for a Web conference that is in-progress.

**To invite participants to a Web conference:**

1. Click **Invite** on the Host console menu bar. The invitation dialog box appears.
2. Type the e-mail address of the participant you want to invite. To invite more than one participant, press **ENTER** after each e-mail address.
3. Click **Send Invitation**. An e-mail invitation to the Web conference in-progress is sent to the persons selected.
Recorder

The Recorder feature allows you to record a Web conference for playback at a later time. Recorded sessions can be made available on the WCRS server for others to play back and view the conference. You can also pre-record a session for playback without actually being in a conference, see “Collaboration Player” on page 87 for details. The conference host can choose what features are recorded during a conference, see “Preferences” on page 52.

NOTE You cannot change settings after a recording is started.

To show the Recorder, click Recorder – Show Recorder on the Host console menu bar. When Show Recorder is selected, the Recorder is active and appears at the bottom of the Host console. Select Show Recorder again to hide the Recorder on the Host console.

You can play back recorded meetings stored locally by selecting Play on the control panel (shown below). Recordings stored on the WCRS server allow other users to access and view the recorded session.
The following features appear on the Recorder:

- **Play**: Starts the playback of an existing file. When recorder is first open, no file is loaded. Click **Play**. You are prompted to browse and open an existing file. After a file is selected, click **Play** to start playing that recording.

- **Stop**: Ends the current recording or playback of the recording.

- **Pause**: Pauses the recording or playback of the current recording. During recording, click **Pause** to pause the recording. When paused, click **Record** to resume recording.

- **Record**: Starts a recording. If a recording is not currently loaded, you are prompted to provide a name for the recording file. If a recording is currently loaded, you are prompted to replace the existing file. The recording and playback files are saved as an .lrec file, which is a proprietary format. See Export (below) to save as an existing file as a different format.

- **Progress Bar**: Indicates the position in the current recording or playback.

  **NOTE**: Because the file length is unknown during a recording, the Progress Bar cannot accurately indicate the position in the file. In this case, when the progress bar gets to the end, it moves back to the halfway position, and then continues moving to show progress of the recording. This is repeated until the recording is stopped.

- **Fast Forward**: Advances the recording playback ahead. Click once to step the file ahead one frame at a time. Click and hold the mouse button down fast forwards the recording until the mouse button is released. Available only during playback.

- **Index**: Shows the number of the current frame being displayed during recording and playback.

- **Timer**: Shows the elapsed time. When recording, it indicates the amount of time since recording was started. During playback, it indicates the elapsed time from the start of the recording.

- **Length**: When recording, displays the size of the file in Kilobytes. During playback, displays the total length (in hours, minutes and seconds). Total length of time of the playback.

- **Open**: Prompts for location of file to play.

- **Preferences**: Displays tabbed pages for Playback and Record options. For details about these options, refer to “Preferences” on page 52.

- **Export**: The .lrec file format can be converted to an .avi file using the Export function. Browse to existing .lrec file, and then click **Export** to start the conversion and save as the different file type.
Recording

Recordings can be saved on the WCRS server, on your computer, or a local network for playback at a later date. By default, recordings saved on the WCRS server are public and the file appears in the list of public recordings, which can be viewed by anyone with access to the Public Area. To change the location where your recording is saved, see To save a recording locally; below.

Access to the recording depends on where the file is stored.

- A recording saved to the host’s computer, only the host has access to the view the recording.
- A recording saved locally to a network drive, only those on the network can view the recording.
- A recording saved on the WCRS server (default), anyone with access to the Public Area can view the recording.

### NOTES

The maximum file size that can be stored on the WCRS server is 20MB.

**To start a recording:**

1. Click ![record icon] to start recording.
2. You are prompted to enter a name for the recording. Type a name for the recording.
3. Click ![stop icon] to end and save the recording.

**To save a recording locally:**

1. Click ![recorder menu] on the Recorder to display the menu, and then select Preferences.
2. Click the Record tab.
3. In the Save recording to options, click My PC to display the following options:
   - **Save:** Browse to the location where the file is to be saved and type a name for the new file, or select the name of the file to be replaced.
   - **Append:** The recording is appended to the selected file.
5. Click ![stop icon], to end and save the recording.

**To limit access to a recording on the server:**

1. Click ![recorder menu] on the Recorder to display the menu, and then select Preferences.
2. Click the Record tab.
3. In the Save recording to options, select Limit access to indicate the session is private.
4. Type the e-mail addresses, separated by a semicolon, in the box for those you want to allow access. If this box is blank, then only the host is able to view the file.
Playback

You can use Playback Options to play any recording they can access. The host has options to broadcast the recording to all participants, to any one participant, or to view the recording privately. There is also an option to loop the video continuously.

Anyone can access archived recordings through the Public Area. From the Public Meetings page, select View Public Recordings to view a list of all the archived public recordings available. Registered users can access archived recordings from their WCRS Office page.

To access playback options:

1. Click  on the Recorder to display the menu, and then select Playback.
2. Select either Preview or Broadcast:
   - Preview: Allows you to play the recording to view without anyone else in the meeting viewing it.
   - Broadcast: Allows you to playback to one participant in a private viewing or broadcast to all participants by selecting the broadcast option in the playback options.
3. Click Loop continuously if you want the recording to play continuously.

To playback a recording saved locally:

1. Click  to display the Recorder menu, and then select Open.
2. Browse to the file location, and then click  to play the recording.

To playback a recording saved on the server:

1. Do one of the following:
   - Click My Office from the navigation pane and select a recording.
   - Click Public Recordings from the navigation pane and select a recording.
2. Click  to play the recording.
Host Control

Besides the default viewer features, there are additional Web conferencing features that are accessible from the Host console. The buttons at the top of the Host console allow you to select a Web conferencing feature. Click the button on the Host console to select the feature. The button changes to indicate that the feature is active, as shown in the example below for Polling. Click the button again to turn off the feature.

The following features are available from the Host Control buttons:

- “Desktop Sharing” on page 60
- “Application Sharing” on page 64
- “Voice Chat” on page 69
- “Video” on page 70
- “Polling” on page 73
- “File Transfer” on page 76
- “Document Manager” on page 78
- “Co-Browse” on page 80

**NOTE** Administrators determine what features are available to users. If any of the features described in this section are not available to you, contact your WCRS system administrator for assistance.
Desktop Sharing

You can use Desktop Sharing to show your desktop to all attendees during a Web conference meeting.

NOTE Desktop Sharing does not support the use of dual monitors. Only what is viewable on the primary monitor is displayed during Desktop Sharing.

To use Desktop Sharing:

1. Click Screen Sharing on the Host console. The Sharing Mode Selection dialog box appears.
2. Select Desktop Sharing.

NOTE If the Sharing Mode Selection dialog box or Desktop Sharing does not appear, refer to “Preferences” on page 52 and check your settings.

In this dialog box, you can also change the color settings for the meeting by selecting from the Colors option list.

3. Click OK. The Screen Sharing Viewer appears. At the bottom of the Viewer is the set of host Desktop Sharing controls. These controls are described in the table on page 61.
<table>
<thead>
<tr>
<th>Icon</th>
<th>Description/Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Move Screen Sharing Window icon" /></td>
<td><strong>Move Screen Sharing Window</strong>: Allows you to click and drag your Screen Sharing window to a location anywhere on your desktop.</td>
</tr>
<tr>
<td><img src="image2" alt="Pause icon" /></td>
<td><strong>Pause</strong>: Pauses the screen sharing broadcast. When paused, the icon changes to <img src="image3" alt="Pause icon" />. Click the icon again to resume Screen Sharing.</td>
</tr>
<tr>
<td><img src="image4" alt="Draw Mode icon" /></td>
<td><strong>Draw Mode</strong>: Sets the Web conference desktop to draw mode. When selected, you can draw on the desktop with your mouse. After the draw mode is enabled, the icon changes to <img src="image5" alt="Draw Mode icon" />. Click the icon again to toggle back to cursor mode. In cursor mode, you can select items within the screen sharing window.</td>
</tr>
<tr>
<td><img src="image6" alt="Display Transparency/Hide Transparency icon" /></td>
<td><strong>Display Transparency/Hide Transparency</strong>: Temporarily hides all annotations made on screen. This will also toggle draw mode off. When in draw mode, the cursor appears as a pen and will not allow the user to click on anything. To get the cursor back, either turn off the transparency, or toggle back to cursor mode. To remove the hide transparency, click the <strong>Display/Hide Transparency</strong> icon. After the item is shown, it can be selected.</td>
</tr>
<tr>
<td><img src="image7" alt="Show Transparency Tools icon" /></td>
<td><strong>Show Transparency Tools</strong>: Displays drawing options such as Font, Line Thickness, Square, Circle, Cut/Move, or Color Selector. Refer to the table on page 62 for details about transparency tools.</td>
</tr>
<tr>
<td><img src="image8" alt="Hide Desktop Icons icon" /></td>
<td><strong>Hide Desktop Icons</strong>: Hides all desktop icons. Click again to show the icons.</td>
</tr>
<tr>
<td><img src="image9" alt="Snapshot icon" /></td>
<td><strong>Snapshot</strong>: Saves an image of what currently appears on your Screen Sharing window. It saves the bitmap locally on your hard drive. The first time you click Screen Sharing Snapshot, a browse window appears to select the directory where you want the snapshots saved. If you want to change the snapshot directory later, open transparency tools and click <strong>Options</strong>. From the menu, select <strong>Set Snapshot Dir</strong>.</td>
</tr>
<tr>
<td><img src="image10" alt="Erase Transparency icon" /></td>
<td><strong>Erase Transparency</strong>: Clears everything drawn or written on your transparency and anything added by participants that had whiteboard tools enabled. After it is erased, you cannot bring it back to your drawing.</td>
</tr>
<tr>
<td><img src="image11" alt="Settings icon" /></td>
<td><strong>Settings</strong>: Opens a menu with additional Screen Sharing options. The menu has screen options such as Full Screen, Restore Viewer, Standard Sizes (to resize the Viewer), Colors, Display Layered Windows, and Restore Acceleration (when video hardware has been disabled by screen sharing). The menu also offers another way to access transparency options such as Hide Transparency, Erase Transparency, and Transparency Tools.</td>
</tr>
<tr>
<td><img src="image12" alt="Close icon" /></td>
<td><strong>Close</strong>: Closes the Screen Sharing window.</td>
</tr>
</tbody>
</table>
Transparency Tools

When you click \(\text{Transparency} \) in your Screen Sharing control area, the Transparency Tools window appears.

The Screen Sharing desktop has two modes, cursor mode and draw mode.

- **Cursor mode**: Use the cursor to select objects on the screen. The cursor mode is the default.
- **Draw mode**: The cursor becomes the drawing tool that allows drawing, annotating, or writing on the Web conference transparency.

When selected, the Screen Sharing transparency allows you to draw, add notations, and add text on top of the existing screen.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description/Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="hide_transparency.png" alt="Icon" /> <img src="display_transparency.png" alt="Icon" /></td>
<td><strong>Hide Transparency/Display Transparency</strong>: Toggles between hide and display transparency. Select Hide Transparency to temporarily hide everything that you have drawn or written on your transparency. Click again to bring your drawing back.</td>
</tr>
<tr>
<td><img src="cursor_mode.png" alt="Icon" /></td>
<td><strong>Cursor Mode</strong>: Sets the Screen Sharing window to cursor mode.</td>
</tr>
<tr>
<td><img src="draw_mode.png" alt="Icon" /></td>
<td><strong>Draw Mode</strong>: Sets your Web conference desktop to draw mode. Click any drawing tool on your Transparency Tools set to switch the Screen Sharing window to draw mode. After you end the Web conference, your drawings or notations disappear. If you want to save what you see on your screen, press Print Screen on your keyboard and then open Paint, paste and save it as a bitmap image of the screen. Right-click in the Screen Sharing window to return to cursor mode.</td>
</tr>
</tbody>
</table>
| ![Icon](rectangle_tool.png) | **Rectangle Tool**: To draw rectangles:  
1. Click the icon, and then click the point on your desktop where you would like to start drawing a rectangle.  
2. Drag the cursor to size the rectangle. |
| ![Icon](ellipse_tool.png) | **Ellipse Tool**: To draw an ellipse:  
1. Click the icon, and then click the point on your desktop where you would like to start drawing an ellipse.  
2. Drag the cursor to size the ellipse. |
<p>| <img src="eraser_tool.png" alt="Icon" /> | <strong>Eraser Tool</strong>: To erase, click and drag the tool to remove parts of a drawing. |</p>
<table>
<thead>
<tr>
<th>Icon</th>
<th>Description/Use</th>
</tr>
</thead>
</table>
| ![Cut Tool Icon](image) | **Cut Tool**: To create the cut box:  
  1. Click the cut tool and the cross hairs appear  
  2. Move the cut tool cross hairs to a point where you would like to start your cut box.  
  3. Hold your mouse button down as you drag the cursor diagonally until the cut area covers what you want to capture in your drawing.  
  4. Press the **Delete** key to delete the cut box contents.  
  To move the cut box and contents:  
  1. Move the cursor over your cut area. The cross hair cursor becomes a cross hair cursor with arrows.  
  2. Hold your mouse button down and drag the cut box to the desired location. |
| ![Text Tool Icon](image) | **Text Tool**: To add text to your transparency:  
  1. Move the text box by dragging it to the desired location, and then enter your text.  
  2. Click outside the text box. Your text is set on your transparency and can only be moved with the cut tool. |
| ![Notation Tool Icon](image) | **Notation Tool**: To add notations, click this icon, and then click a point of interest on your screen. Each time you click, the number that appears with the arrow increments by one. |
| ![Snapshot Icon](image) | **Snapshot**: To take a snapshot, click this icon to save a bitmap image of what currently appears on your Screen Sharing window. It saves the bitmap on your hard drive. |
| ![Erase Transparency Icon](image) | **Erase Transparency**: To erase transparency, click this icon to clear everything you have drawn or written on your transparency. After it is erased, you cannot bring it back to your drawing. |
| ![Color Palette Icon](image) | **Color Palette**: To select color options, click this icon, and then select a color for lines, text or notations. |
| ![Close Icon](image) | **Close**: Closes the Transparency Tools. |
Application Sharing

To use Application Sharing, click **Screen Sharing** on your Host console, and then select **Application Sharing**.

The Application Sharing window shows all applications running on your computer. When an attendee logs into the meeting, they will see a gray screen until you select the applications you would like to show on the Client console.

When using Application Sharing, consider the following:

- After you select an application, only that application will be shared. If another application that is not shared is covering the shared application, a wallpaper covers where the non-shared application overlaps the shared application.

- To have an application appear in the Application sharing window, select the application so that a check mark appears. The application then appears in the client console application window.

- Through Application Sharing, the host can give attendees the ability to use remote control or whiteboard features. After choosing Application Sharing, the host goes to the Attendees tab and can provide one or more attendees with either the pencil (whiteboard tools) or mouse (remote control), or both.

- If an application is started or closed after Application Sharing has been initiated, click the **Refresh List** icon to update the list.

**NOTE**

If there are multiple applications running on the desktop, it is important to minimize any application that is not to be shared within the Application Sharing window. If the non-shared applications appear in the foreground, they are masked out with Web Conferencing graphics and will block the view of the shared application.
After everyone can see the shared application, you can allow selected individuals or all attendees to try out the application by giving them remote access. You can give one or more attendees remote access by selecting their name in the attendee list, and then clicking the remote control icon next to the attendee’s name. A mouse icon appears next to the attendee name to indicate they access to the shared application remotely. Giving them remote access allows them to simultaneously control the application running on your desktop.

**NOTE** Giving more than one participant remote control at the same time may cause problems if one person moves the mouse while another person tries to type.

### Application Sharing Settings

You can access Application Sharing settings through Settings on the viewer frame. In the following example, several applications are running so they appear in the list of application that can be shared. The attendees in the conference can see what is done within an application on the desktop after you select the check box next to the application. To stop Screen Sharing, click the Screen Sharing icon.

Click **Settings** to set properties (color settings, scan rate, or other properties) and functions (Hide Desktop Icons, Restore Acceleration, or other functions).

- **Pause**: Stops sending information to the attendees. When selected, the image broadcast via Screen Sharing becomes a snapshot of that area at the time Pause is clicked. Also, the Pause menu option changes to Broadcast. Click **Broadcast** to resume the dynamic updating and broadcast of the image.

- **Color settings**: Selects the number of colors to use. The available choices are 256 color, High Color (16 bit) and True Color (24 bit). Higher color settings translate into a better image on the attendee computers, but also uses more bandwidth.

- **Scan Rate**: Determines how frequently the Screen Sharing window is checked to determine if anything has changed. The options available are Low, Medium and High. The higher the value, the more often the Screen Sharing window is refreshed. High values equate to greater smoothness of motion on the screen, where as low values equate to uneven motion.
- **Display Transparency**: The Screen Sharing area operates as if a transparent sheet (or layer) were placed over the screen content. You can mark up the transparent layer using the Transparency Tools. When selected, the Display Transparency setting shows what is on the transparent layer. When displaying transparency, the menu option changes to Hide Transparency.

- **Erase Transparency**: Erases all items on the transparency.

- **Transparency Tools**: Turns on the tools, which are almost the same in function as Whiteboard tools. Transparency Tools provide two extra items: the Cut tool and the Hide/Display Transparency icon.
  - **Cut tool**: Cuts out the data within a specified area of the transparent layer and deletes or moves it. To do this:
    a. Click the Cut tool icon, and then click the point on your desktop where you would like to start the rectangular cut region.
    b. Diagonally drag the cursor to the location where you want to place the opposite corner of the cut region. A gray rectangle with a dashed outline appears.
    c. Press the Delete key to delete the region and its contents.
    Do either of the following:
    - Place the cursor outside the cut region and click cancel to cancel the cut operation.
    - Place the cursor within the cut region to display the Move icon. With the Move icon displayed, click and drag to move the region. Release the mouse button to place the region and its contents at the current location.
  - **Hide/Display Transparency icon**: Accomplishes the same functionality as the Display Transparency and Hide Transparency settings mentioned on the previous page.

- **Hide Desktop Icons**: Hides icons displayed on the computer desktop. When icons are hidden, the Settings icon has an option to Show Desktop Icons.

- **Restore Acceleration**: Use this option to reset the graphics hardware acceleration back to the setting it was before starting Screen Sharing. Afterward, the option will change to Disable Acceleration. WCRS will attempt to disable the Windows graphics hardware acceleration to maximize compatibility for Screen Sharing (Desktop or Application Sharing). If WCRS is successful, the Restore Acceleration menu option will appear. If WCRS is not able to disable the graphics hardware acceleration when starting Screen Sharing, there will not be any option for Restore or Disable Acceleration.
• **Display Layered Windows**: Allows objects that are displayed on any layer, other than the first layer, to be shown. Layered windows also allows objects to be displayed on different layers, and it can produce interesting effects. In Web Conferencing, the Screen Sharing window only sends information from layer 1. If an application is using layered windows, items appearing on other layers will not be visible within the Screen Sharing window. Choosing Display Layered Windows views all layers, not just layer 1. This allows more information to be shown, but it does cause Screen Sharing to do more work, and it can impact performance. This option is always enabled.

If an unshared application window appears on top of a shared application area, the area displays an image indicating the area is not shared, as shown in the example below.

• **Close**: Exits Application Sharing.
Giving Screen Sharing Control to an Attendee

As the host, you can share your desktop or application with the attendees during a Web conference, and then give someone else control. When an attendee has control of the desktop or application, they can use their mouse and keyboard as if they were on your (host) computer.

**To give control of your desktop or application to someone else:**

1. On the Host console, click the **Screen Sharing** button to share your desktop (page 60) or application (page 64). The icon appears next to your name when Screen Sharing is selected.
2. From the attendee list, select the check box next to the name of the attendee to whom you want to give control.
3. Click the button at the bottom of the Attendees tab to give control to the attendee. The icon appears next to their name in the attendee list. Click the button again to take control back from the attendee.

Click the button at the bottom of the Attendees tab to allow an attendee use of the Desktop Sharing tools (page 60). Click the button again to take away control of the Desktop Sharing tools.

In the example below, Screen Sharing is selected and the (selected) attendee has remote control of the host's desktop with use of the Desktop Sharing tools.


Voice Chat

The Voice Chat features allows meeting participants to communicate with sound through their computer.

NOTE

Participants must have a sound card and a microphone to use Voice Chat. If a sound card is not installed or is not configured, the microphone icon will appear with a red X. However, WCRS cannot detect if a microphone is connected to a participant's computer.

You can see if Voice Chat is being broadcast to participants by checking the Attendee list. If a microphone icon appears next to an attendee’s name, you can broadcast Voice Chat to them. To enable or disable an attendee's microphone, select the attendee and click the microphone button. When enabled, the microphone icon appears next to the attendee and allows them to speak during the meeting.

To open Voice Chat:

Click the Voice Chat button to open the toolbar in the Host console.

The Voice Chat toolbar consist of three main parts:

- The left side shows the volume control and mute check box for the speakers or headphones. Select mute to disable the sound.
- The right side shows the volume control and mute check box for the microphone. If the microphone is enabled, select mute if you do not want to transmit through your microphone.
- The arrow down link opens a menu that allows you to choose the audio source (microphone, wave or line-in). Wave is used to play sounds through the Windows mixer such as those embedded in applications or Web sites.
Video

When you click the Video button on the Host console, the Video tab and the Voice Chat toolbar appear. By default, Voice Chat automatically starts when Video is selected. To change the setting from the default, refer to “Preferences” on page 52.

When you select Video, the monitor is blank until you click the preview button on the Video tab. The video display typically has a several second delay to initialize the camera. If your camera is properly installed, your video transmission appears in the video pane. The example below is the videoconferencing screen before transmission starts.
When you select the preview button, the following appears at the bottom of the console.

When you click **Broadcast Video**, “Broadcasting” appears at the bottom of the console.

The example below, shows the Video tab. Click the **Hide** button in the frame to hide the video on the Video pane. The Video pane then displays a Hidden Videos button. Click **Hidden Videos** to display a list that includes an option for Local Video and other participants video. Select the video screens to return them in the Video pane.
Click **Options** in the pane to open a video options menu. This menu allows you to select the input for video and other video options such as, video quality. By default, video input is Camera (Webcam), however, click **AVI Player** to play an existing .avi file, .wav or .au file using the AVI Player.

To change video settings:

Click **Settings** and choose from the options.

- **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. Record 8 or 12 frames per second maximum.

- **Video Quality**: Your choices are Good, Better, and Best. 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, then it may help to set Video Quality to Good.

- **Raw Image Size**: Choose either 176 x 144 or 352 x 288.

**NOTE**
The Raw Image Size never exceeds 352 x 288 pixels, even though the videoconferencing window can be undocked and resized.

- **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 typically different for each camera, because they depend on the camera’s driver.

- **Video Format**: Allows the attendee on the local computer to specify the Resolution and Codec to be used by the camera for video capture. The list of codecs are specific to the camera being used.

Refer to “Voice Chat” on page 69 for more information on the audio portion of video conferencing.
Polling

Polling allows the host to ask questions of the attendees and get feedback from them. As attendees respond to the poll, the host receives information on how many attendees have answered, and how many responses were received for each answer.

To access User Polling, click Polling in the toolbar on the Host console.

When the polling tabbed window appears, you have six polling question options.

To create polling questions:

1. Select the type of poll question from the list.
   - True/False: Compose a question that you want to ask the attendees of your meeting that can be answered either with True or False.
   - Yes/No: Compose a question that you want to ask the attendees of your meeting that can be answered either with Yes or No.
   - Multiple Choice (Single Selection): 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): 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.
   - Essay: Compose a question without a selection. You have the option to provide an answer for the question. However, when the question is sent only the question is viewable to the attendees.
   - <BROWSE>: This option allows you to open a saved poll question to show to your meeting attendees. You can save the polling questions you create for use later. When previewing the question, click SAVE and the question is saved as a .poll file.

NOTE: You can edit the .poll file after you click SAVE and then click Back on your browser. Make the necessary changes, and then click Preview to get back to this screen to save it.
2. Type your question in the box, and then click **Preview**.

![Image of Inter-Tel® Web Conferencing and Remote Support User Guide](image)

3. A sample of the question is shown along with the answers. Do one of the following:
   - Click **Save**, and then specify the location and type a file name, using `.poll` as the extension.
   - Click **Back** to make changes to the question or question type.
   - Click **Send** if you are satisfied with the question and answers, to deliver the poll to the attendees.

![Image of Inter-Tel® Web Conferencing and Remote Support User Guide](image)
To view polling results:

1. As attendees respond to the poll, the host receives information about the response and can view the results.

2. From this view the host can do the following:
   - Click **Show Details** to display a list of all responses for each individual participant in text format.
   - Click **Save** to save the results to a text or .csv file.
   - Click **Cancel** to cancel the results and return to the page where the **Preview** button is active.
   - Click **New** and create a new question.
File Transfer

Use File Transfer to distribute files or folders to either selected attendees or all attendees in the Web conference.

**NOTE** The maximum file transfer size is 300MB. Exceeding this limit can cause the system to lockup or drop the connection.

**To access File Transfer:**

1. Click **Files** on the Host console.
2. Select **File Transfer** from the File Utility Selection window, and then click **OK**.

**NOTE** If the File Utility Selection window does not appear, check your Preferences settings. See “Preferences” on page 52.
3. Clear the check box next to an attendee in the list of users, if you do not want the attendee to receive the file or folder.

4. The File Transfer window appears. Navigate to the file or folder, and then select it from the Name list.

5. Drag and drop the selected item or items to Attendees.

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

When the attendee receives the file, a dialog box appears and the attendee can select the location where the file will be copied to their computer.

The attendee can click OK to copy the file or click Cancel to abort the file transfer.

7. After you are finished sending files, close the File Transfer window.
Document Manager

Document Manager allows the WCRS server to be used as a file repository. You can access Document Manager from View Public Documents (refer to “Viewing Public Documents” on page 11) or launch Document Manager from the navigation pane on the home page. The following section describes using Document Manager from the Host console.

To access Document Manager:

1. Click Files on the Host console.
2. Select Document Manager from the File Utility Selection window, and then click OK.

NOTE
If the File Utility Selection window does not appear, check your Preferences settings. See “Preferences” on page 52.
3. Document Manager opens in the Host console. The view shows your local drive in the left pane, and in the right pane are the folder and file that you can access.

4. Do either of the following:
   - Select files or folders from the Local (your computer) pane, and then select the Remote (server) location. Click to move the files or folders.
   - Select files or folders from the Remote (server) pane, and then select the Local location. Click to move the files or folders.

   **NOTES**
   Attendees have access to Public and Session folders. Only the host has access to the Private folder. The maximum file size is set by the administrator; by default it is 47 MB. The maximum file size limits the documents that can be stored on the server or locally.

5. The left and right arrows change color while the files or folders are being copied to the destination location. These arrows return to their inactive color after the transfer is completed.
Co-Browse

When you start the Co-browse control, an browser window opens on your desktop and on the desktops of the attendees in your Web conference. As the meeting host, after you start browsing the Internet, every Web page you view appears on the co-browse windows of your meeting attendees.

When you close your host Co-browse window, you are prompted with the option to allow the browser windows to remain open on the attendee’s desktops or to close them. After you close your host browser and you allow the attendee browser windows to remain open, the attendees then have control over their browser window can continue browsing the Internet on their own.

<table>
<thead>
<tr>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Co-browse only works with Internet Explorer and is not supported with other Web browsers.</td>
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<td>• Attendees maintain control of their browser and should not navigate on their own. However, if an attendee navigates away whenever the host clicks on a link, they are redirected to the same page as the host.</td>
</tr>
<tr>
<td>• Clients are taken to the same URLs as the host. Web pages that use dynamic URLs will not work.</td>
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</table>

NOTES

• Co-browse only works with Internet Explorer and is not supported with other Web browsers.
• Attendees maintain control of their browser and should not navigate on their own. However, if an attendee navigates away whenever the host clicks on a link, they are redirected to the same page as the host.
• Clients are taken to the same URLs as the host. Web pages that use dynamic URLs will not work.
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.

A host can also view an attendee desktop or allow an attendee to broadcast their desktop, while the host maintains controls for the meeting.

To transfer meeting control from the host to an attendee:

1. Choose the participant that will become the host by selecting the checkbox next to their name.
2. Click Options, and select Transfer Hosting Capability.

To transfer control back to yourself as the original host:

1. Select the participant that is currently the host.
2. Click Options.
3. Select Restore Host Control.
View Attendee Desktop

As the host, with this option you can view the desktop of any attendee you select, one attendee at a time. This feature is used for one-on-one interaction between the host and the selected attendee.

To view an attendee’s desktop:

1. Select an attendee from the Attendee List.
2. Select Options – View Selected Desktop.
3. The attendee must click the Play icon to allow the host to view their desktop. The desktop then appears in the Host console Viewer window. Click the Play icon again to pause the viewing at any time.

To end the viewing of their desktop, the attendee must click the Close icon.

![Host Console and Attendee Desktop Diagram]
Broadcast Attendee Desktop

This option allows an attendee to become a guest presenter and share their desktop, while the host retains control of the Web conference. All attendees can see the desktop of the guest presenter. This allows the host to do perform other tasks such as, activating recording controls or handling text chat, while an attendee manages session content.

To broadcast an attendee’s desktop:

1. Select an attendee from the Attendee List.
2. Select Options – Broadcast Selected Desktop.
3. The attendee must click the Play icon to allow the broadcast of their desktop. The desktop then appears in the Viewer window of all attendees.

To end the broadcast of their desktop, the attendee must click the Close icon.
Undocking and Docking Tools

The Collaboration Client allows you to undock and dock the different windows or panes. There are two ways you can dock or undock tools:

- As a group of active tabbed pane host controls.
- As a specific active host control.

To undock as a group of active tabbed pane controls, click on the top of the frame or the title bar above the Attendee List and drag the entire group to a place on your desktop as shown below:
Each active feature can appear as either a separate tabbed pane or a toolbar. To undock a specific window that appears in a tabbed pane, click the tab and drag it onto the desktop. The example shows Application Sharing undocked.

If the feature is displayed within a toolbar, such as Voice Chat or the Recorder, click the toolbar until the cursor appears as two perpendicular arrows, and then drag the pane onto the desktop.

**NOTE** You can redock a feature to its previous location by double-clicking the title bar.
The other way to redock a control is to click the application toolbar or pane and drag it back to the Host console. Controls in tabbed panes or toolbars can be redocked in a different location within the Host console. During the docking process of an application within a tabbed pane, if you hold down your mouse button and move your cursor to different areas on the Host console, you will see different gray outlines of where you can dock the screen.

If you redock the application tabbed pane or toolbar on either to the side or in the upper portion of the Host console window instead of the original location, you may need to enlarge the client area of the Host console window to attain a usable view of the redocked application pane or toolbar. Resize the Host console by clicking on a corner of it, and then dragging it with your mouse.
Collaboration Player

The Collaboration Player allows you to make a recording offline without having to be logged on to the WCRS server. With the Collaboration Player you can simulate a session, record it, and play back the recording without being connected to the Internet. You can also use the stand-alone player to play back recordings that were created during a Web conference. For more details about recording a session, see “Recorder” on page 55.

To launch the Collaboration Player:

Select Start – Programs - Inter-Tel Collaboration - Inter-Tel Collaboration Player.

The Collaboration Player includes the following features that can be recorded:

- **Desktop Sharing** (Screen Sharing): Record your desktop.
- **Application Sharing**: (Screen Sharing): Record applications being shared.
- **Voice Chat**: Record your voice using a microphone connected to your computer.
- **Video Conferencing**: Record a video. When you select Video, Voice Chat is automatically initiated by default. To change the default setting, go to Preferences – Video, and then clear the check box **Start Voice Chat automatically when Video is initiated**.
- **Chat**: Record text to display text during the recording. Because the Collaboration Player is an offline recorder, you can add text to the recording by clicking the Chat icon, and then typing text that speaks to a specific portion of the recording.
Remote Support

Remote Support allows you to offer online support to your clients, which drastically reduces call times while increasing customer satisfaction and first-time call resolution.

Key support tools include remote desktop viewing and control, bi-directional file transfer, remote computer reboot, system information, system configuration recovery, keyboard chat, videoconferencing, queue transfer and unattended access.

For support clients use the Client console, while customer service, sales, and support associates use the Agent Console.

Remote Support features and functionality are described in the following sections:

- “Launching an Agent Session” on page 90
- “Using the Remote Support Agent Console” on page 92
- “Launching a Client Session” on page 112
- “Using the Remote Support Client Console” on page 115
Launching an Agent Session

To begin a Remote Support session, you must be a registered user on your WCRS server. After you have a user ID and password, you can log on and launch a Remote Support session. To log on to the WCRS server, see “Logon/Logoff” on page 7.

To launch a session:

1. After you log on, your My Office page appears along with a Navigation pane on the left side of the Web page. From the Navigation pane, click LAUNCH CONTROLS to launch a Remote Support Agent Console.

If this is your first time joining a Remote Support session, you will be prompted to install the Collaboration Client if you have not done so already. See page 13 for installation instructions.

After connecting to the WCRS server, a control window appears to indicate you have joined all of the queues you have been assigned to, and you are now waiting for a client to appear in one of your queues.

Every agent will see at least two queues: the default queue and the personal queue, which includes their user ID. Agents can be assigned to additional queues after the administrator creates them. In the example above, there are two custom queues (PLM and PLM2).

After a client enters a queue, the client’s name appears in the agent’s queue list, as shown below.
2. To view the information that was entered, such as the client’s e-mail address and question, click the client name.

3. To begin a Remote Support session, double-click the name of the client on your queue list.
Using the Remote Support Agent Console

While you are in an active session with a client, you see the Agent console. Click Help on the menu bar to open the online Help.

To invite a third-party to a Remote Support session:

1. From the Attendees tab, click Address Book.

2. Copy the e-mail address of the person you would like to invite to the session.

3. Click Invite. The Collaboration Client dialog box opens.

4. Paste the e-mail address in the text box, and then click Send Invitation.
To save the current keyboard chat history:

1. From the Chat tab, click \[\square\].

2. Save the chat history to a .txt file.

To transfer your client to a different queue:

1. On the Attendee tab, click the Transfer to box, and then select a queue from the list.

2. After waiting in the selected queue, the client is connected to an agent.
To remove a client from a session:

1. From the Attendees tab, select the client by checking the box that appears in front of their name.
2. Click Options, and select Terminate Selected User(s).

**NOTE** When you end a session, you can still see the chat history but the client cannot.

**Show Desktop**

To share your desktop with the client, click Show Desktop, as shown below. Then, you are prompted to select either Desktop Sharing or Application Sharing, unless the screen sharing preferences are set to launch one or the other.

Dashed boundary lines for the Desktop Sharing appear. You can resize the viewing frame using the tool in the lower-right corner of the window.
At the bottom of the Desktop Sharing area, you see the sharing controls, as described in the following table.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description/Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Move Screen Sharing Window" /></td>
<td><strong>Move Screen Sharing Window</strong>: Click and drag your Screen Sharing window anywhere on your desktop.</td>
</tr>
<tr>
<td><img src="image" alt="Pause" /></td>
<td><strong>Pause</strong>: Pause the Screen Sharing broadcast. After Screen Sharing is paused, this button changes to 🎥. Click again to resume the Screen Sharing broadcast.</td>
</tr>
<tr>
<td><img src="image" alt="Draw Mode" /></td>
<td><strong>Draw Mode</strong>: Set your Remote Support desktop to draw mode which allows you to draw with a pen. After the pen mode is enabled, this button changes to 🖊️ which starts cursor mode. Click this button to revert back to cursor mode. You can also right-click to toggle from draw mode to cursor mode.</td>
</tr>
<tr>
<td><img src="image" alt="Hide Transparency" /></td>
<td><strong>Hide Transparency</strong>: Temporarily hide all annotations made on screen. This will also toggle off draw mode. When in draw mode, the cursor appears as a pen and will not allow you to click on anything. To get the cursor back, either turn off the transparency, or toggle back to cursor mode.</td>
</tr>
<tr>
<td><img src="image" alt="Show Transparency Tools" /></td>
<td><strong>Show Transparency Tools</strong>: Display drawing options such as Font, Line Thickness, Square, Circle, Cut/Move, or Color Selector.</td>
</tr>
<tr>
<td><img src="image" alt="Hide Desktop Icons" /></td>
<td><strong>Hide Desktop Icons</strong>: Hide all desktop icons. Click again to show the icons.</td>
</tr>
<tr>
<td><img src="image" alt="Snapshot" /></td>
<td><strong>Snapshot</strong>: Save a bitmap image of what currently appears on your Screen Sharing window. It saves the bitmap on your hard drive. The first time you click 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 the transparency tools and click <strong>Options</strong>. From the menu, select <strong>Set Snapshot Dir</strong>.</td>
</tr>
<tr>
<td><img src="image" alt="Erase Transparency" /></td>
<td><strong>Erase Transparency</strong>: Clear everything you have drawn or written on your transparency. After it is erased, you cannot bring it back to your drawing. This also erases all markups made by participants who had access to whiteboard tools.</td>
</tr>
<tr>
<td><img src="image" alt="Close" /></td>
<td><strong>Close</strong>: Close the Screen Sharing window.</td>
</tr>
</tbody>
</table>
To see other Screen Sharing options, click the Settings button on your Desktop Sharing frame to open a menu of options.

Voice Chat

When you click the Voice Chat button, the Voice Chat feature appears in both your console and the client’s console. To stop Voice Chat, click Voice Chat again.

The Voice Chat toolbar consist of three main parts:

- The left side contains the volume control and mute check box for the speakers. Select mute to disable the speakers.
- The right side contains the volume control and a mute check box for the microphone. Select the mute check box if you do not want to transmit through your microphone.
- On the far right side there is an arrow down button. Select an audio source (microphone, wav or line-in) from this menu.
Video

Click **Video** on the control toolbar to open the Video tabbed window. By default, Voice Chat automatically starts when you select Video. You can change the default setting under Preferences on the menu bar. The example below shows the Video tabbed window before transmission. Typically, it takes a second or two to initialize the camera after you start broadcasting. If your camera is properly installed, your video transmission appears in the Video pane.

The agent can allow multiple session attendees to transmit video, in which case you will see a window for each person allowed to transmit video.

The following features are available on the Video tab:

- **Broadcast Video**: The Broadcast Video button ▶ allows you to start your videoconference broadcast. When the preview shows what you want to display, click the Broadcast Video button.

- **Stop Broadcast**: The Stop Broadcast ■ button stops the video broadcast and the video pane goes blank.

- **Preview Video**: When you start a videoconference, the monitor will be blank until you click either Broadcast Video or Preview Video 📹. The Preview feature allows you to make adjustments to your camera before you begin.
• **Options Button**: Click the **Options button**, and then select **Settings** to adjust the following video quality-related areas:

  - **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. Record 8 or 12 frames per second maximum.
  - **Video Quality**: Your choices are Good, Better, and Best. 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, then it may help to set Video Quality to Good.
  - **Raw Image Size**: Select 176 x 144 or 352 x 288.
  - **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, depending on the camera 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.
  - **Set Snapshot Dir**: Sets the location of where your video snapshots are saved.

• **Hide Button**: The **Hide** button hides a video screen in the local video pane. The Video pane displays a Hidden Videos button. Click **Hidden Videos** to display a list that includes an option for Local Video and other participants video. Select the video screens to return it to the Video pane.

• **Snapshot**: The **Snapshot** button allows you to save an image of what currently appears in the Video pane. A bitmap is saved locally on your hard drive. The first time you click Snapshot, a browse window appears to select the directory where you want the snapshots saved. If you want to change the snapshot directory later, open transparency tools and click **Options**. From the menu, select **Set Snapshot Dir**.
Co-browse

When you select Co-browse, a browser window opens on your desktop and on the client’s desktop. When you browse the Internet, every Web page you view will also appear on the co-browse windows of your client.

When you close your co-browse window, you are offered the option to close the browser window on your client’s desktop or to allow the browser window to remain open. Leaving the browser window open allows your client to bookmark the page and continue interacting with it (for example, to search the online knowledge base, complete online applications for loans, make reservations, or other tasks).

Co-browse only works with Internet Explorer® and is not supported with other Web browsers.

Attendees maintain control of their browser and should not navigate on their own. However, if an attendee navigates away whenever the agent clicks on a link, they are redirected to the same page as the agent.

Clients are taken to the same URLs as the agent. Web pages that use dynamic URLs will not work.

Recorder

To show or hide the Recorder, click the Recorder button located on the Agent console below the Menu Bar.

The Record option records selected features for playback at a later time. The agent can choose what to record: Desktop Sharing/Application Sharing (whichever is active when recording starts), video, audio or chat. Recorded sessions can be converted from the proprietary .lrec file format to the standard .avi format using the Export feature, which is available from the options menu on the Recorder toolbar.

You can change Screen Sharing settings before you start recording. After the recording is started, Screen Sharing settings cannot be changed.
Recordings can be saved on the WCRS server, the agent’s computer, or local network. The agent can play recorded meetings stored locally by selecting the playback option on the Recorder toolbar. Participants cannot view recordings for Remote Support sessions unless they are stored on a server that has both Web Conferencing and Remote Support installed, and the recordings are stored in a public folder.

To start a recording:

Click the **Recorder** button in the Agent console to open the Recorder toolbar.

**NOTE**  
The maximum file size that can be saved on the server re is 47 MB.

The following features appear on the Recorder:

- **Play**: Starts the playback of an existing file. When recorder is first open, no file is loaded. Click **Play**. You are prompted to browse and open an existing file. Click **Play** again to start playing the recording.

- **Stop**: Ends the current recording or playback of the recording.

- **Pause**: Pauses the recording or playback of the current recording. During recording, click **Pause** to pause the recording. When paused, click **Record** to resume recording.

- **Record**: Starts a recording. If a recording is not currently loaded, you are prompted to provide a name for the recording file. If a recording is currently loaded, you are prompted to replace the existing file. The recordings and playback files are saved as .lrec files, which is a proprietary format. Select Export from the Recorder menu and save as a different format.

**IMPORTANT**  
When recording a session within remote support, you must start the “remote control” function AFTER the recording has started. For example, you are already using remote control and then decide you want to record the session. Restart the remote control session after the recording is started or it will not record remote control.

- **Progress Bar**: Indicates the position in the current recording or playback. Because it is unknown how long the file will be, the Progress Bar cannot accurately indicate the position in the file. In this case, when the progress bar gets to the end, it moves back to the halfway position, and then it continues moving to show recording progress. This is repeated until the recording is stopped.
• **Fast Forward**: Advances the recording playback ahead. Click once to step the file ahead one frame at a time. Click and hold the mouse button down fast forwards the recording until the mouse button is released. Available only during playback. When you use fast forward, the recording may skip ahead and not draw all included data.

• **Index**: Shows the number of the current frame being displayed during recording and playback.

• **Timer**: Shows the elapsed time. When recording, it indicates the amount of time since recording was started. During playback, it indicates the elapsed time from the start of the recording.

• **Length**: When recording, displays the size of the file in Kilobytes. During playback, displays the total length (in hours, minutes and seconds). Total length of time of the playback.

• **Open**: Prompts for location of file to play.

• **Preferences**: Displays tabbed pages for Playback and Record options. For details about these options, refer to “Preferences” on page 52.

• **Export**: Select an existing .lrec file and export as a different file type.

**Record Options**

The Record tab displays the following recording options:

• **Screen Sharing** (Desktop Sharing or Application Sharing): Records the Screen Sharing method that is in use when recording.

• **Keyboard Chat**: Includes both public and private chat.

• **Video**: Include video when a camera is connected to the computer.

• **Voice Chat**: Include audio when a microphone is connected to the computer.

You can select a combination of these of these controls to record.
In addition, the **Save Recording to** options allow you to save the recording to one of the following:

- **My PC**: Saving a recording to your local PC provides additional options:
  - **Save**: This option generates a dialog box which prompts you to decide whether the existing file is to be replaced by the new recording. Clicking **Yes** brings the recording session to a Record pending mode to allow the agent to set up the desktop for the recording session.
  - **Append**: If the append option was selected in the record options, the recording session will be appended to the file that has been selected by the agent.

- **Collaboration Server**: Saving to the Collaboration Server is the default.

  To save a recording to the Collaboration Server, the Collaboration Server option must be selected. All of the options described under the “What to record” preference (below) for saving a recording to my local PC also apply here:
  - You can choose record preferences. You can decide what to record and where to save the recording.
    - **What to record**: options include Save and Overwrite.
    - **Where to save recording**: options include Limit Access, which requires e-mail addresses that correspond to registered system users who have valid User IDs that allow them to log on to the server.
  - You must launch the collaboration controls you want to record since they no longer launch automatically when the record button is pressed.
  - When you press the record button on the Recorder, it first prompts you to save the file by giving it a description, regardless of whether it is being saved to “My PC” or to the “Collaboration Server.” The server does not allow you to continue without naming the files, so you must provide a name here.
  - The recording starts after the file name/description is specified. It does not require you to press the record button a second time. If not specified controls are active, it doesn’t record anything until at least one of the specified controls are launched.
  - The recording finishes when you press the stop button on the Recorder toolbar.
  - When using the Recorder/Player to play back a file, it will either allow you to open a file on your local PC, or you can press play to get the same prompt. If you just saved a recording, pressing the play during the same meeting results in the playback of the most recent recording regardless of where it is saved (locally or on the server).
  - You can playback recordings from the public area only if the server has both Web Conferencing and Remote Support installed. If only Remote Support is installed, the public area is not available and therefore, you cannot access recordings stored there.
Playback Options

You can use Playback Options on the control console to play any record/playback file to which you have access. You have the option of broadcasting the recording to all clients, to any one client, or to view the recording privately. There is an Interactive option in playback mode that allows you to pause and insert something (for example, a PowerPoint® slide or screen shot) into the Screen Sharing window. You also have options to play the recording over in a repeat mode (loop continuous), or to just play it once.

To play back a file, select Options – Playback from the control console menu. During playback you can use the following functions:

- **Scroll forward/backward**: During a playback session, the scroll bar at the top of the control console can be used to move backward or forward.
- **Index**: An index counter (size is unlimited) is provided and is indicated by the pound sign (#). This indicates where you are in a recording or playback and can be used as a reference when you need to point to a particular frame in the recording.
- **Timer**: Two timers are active during record and playback: one to keep track of elapsed time and one that shows the actual length or total time of the recording. Total time of the recording is located under the red record button. Elapsed time is under the pause and the stop buttons. Both timers can go up to 99 minutes.
- **Preview**: This option allows you to play the recording and not broadcast to anyone in the meeting.
- **Broadcast**: The agent can show the playback to one participant in a private viewing or broadcast to all participants by selecting the broadcast option in the playback options.

Playing Back Archived Files

Users can access archived recordings through the Join Public Session page on your Web Conferencing Web site. Users who are registered with their Remote Support server can also access archived recordings in their Web Conferencing office page, but ONLY if the Web Conferencing server is installed.

When following the link to the archived meetings area, you are provided with a list of all the public archived meetings (or recordings) available. You are also provided a list showing all of the private archived meetings available.

To view any of these recorded meetings, select the one to view, and then click the link in the display. The necessary software (the viewer or player) is downloaded to your computer, the playback control is launched, and the playback automatically begins playing the selected file.
Remote Control

To take control of the mouse and keyboard of the client’s computer, click the **Remote Control** button on your control console. The following appears on the client’s desktop:

If the client accepts, the client’s desktop will appear on your desktop and you will be able to control the client’s computer remotely.

**IMPORTANT**

When recording a session within remote support, you must start the “remote control” function AFTER the recording has started. For example, you are already using remote control and then decide you want to record the session. Restart the remote control session after the recording is started or it will not record remote control.
File Transfer

The file transfer feature lets you easily move files, perform file transfers and conduct file management activities such as file synchronization and cloning between your Remote Support computer and a connected client’s computer. The maximum file transfer size is 300MB. Exceeding this limit can cause the system to lockup or drop the connection.

When you click File Transfer on your Remote Support user interface, a file transfer request is sent to the client.

The client must accept your request before you can perform a file transfer on their computer. Using a network, modem, or IP connection, you can perform the following basic file transfer tasks between your computer and a connected user computer using Remote Support:

- Drag and drop to copy selected files or folders from one computer to another.
- Delete selected files or folders.
- Create new folders.
System Recovery

The System Recovery feature allows you to easily perform backups of current registry, system and custom files of the client’s computer. After a System Recovery backup has occurred, you can use System Recovery to restore the client’s system configuration to any previous system configuration as long as it has been backed up using System Recovery.

When you click System Recovery, you send a Technical Support request to the client’s computer:

The client must accept your request before you can run System Recovery on their computer.

If you want to remove custom files from the backup list, select the file you would like to remove and click Remove.
Backup

The agent can specify the Backup Configuration Settings by selecting which of the following files to include:

- System Files
- Registry Files
- Custom Files

At least one selection from one of the three groups is required before a Save Settings request is allowed.

- **Registry and System Files**: Selected files will be backed up. You can backup custom files by typing the name of the custom file in the Add text box and then click the Add button.

- **Custom Files**: Provides the ability to create a list of any number of valid user-defined files.

You must click the Save Settings button to add this information to the configuration; otherwise, the Custom File will not be saved as part of the configuration.

- **Add and Remove** buttons: Updates the Custom file list. A verification of the existence of each file on the host computer is made, prior to adding each file to the list.

- **Refresh Settings** button: Resets the Configuration settings to the state just after the last Save Settings request.

- **Default Settings** button: Erases the custom file list and re-selects all entries in the Registry and System files section.

- **Save Settings** button: Captures the Configuration settings that will be used when the next Backup Configuration Request is made.

- **Backup Current Configuration to File**: You also have the option of entering a description for the Backup. A default name of “User Backup” will be used if the Comment entry box is left blank. All Backup descriptions are prefixed with a formatted date and time stamp obtained from the host computer.

- **Backup Configuration**: System Recovery server processes the request and creates a copy of all files specified in the Backup Page. These files are individually compressed with a default file name of the date and time.
The Restore page allows you to retrieve previously saved configurations and use them to replace the current system configuration.

The System Recovery Component (System Recovery) creates an initial backup of the system after the system is restarted. The Backup Configuration consists of default settings that include all of the files in the System Files group and in the Registry.

- **Backup Configuration Files**: Select a saved configuration file from the Backup Configuration Files list. Each entry in the list represents the contents of a backup previously created using the Backup page.

- **Last pre-restore Backup**: Contains a Backup of each item that was altered during that Restore; this is used to undo the changes made during the Restore.

- **Restore**: Restore your computer to a previous system configuration by selecting the backup file that contains a version of that system configuration. Click Restore button and the System Recovery server refreshes the remote computer with the backup contents.

- **Undo** button: Enabled when the check box for the last pre-restore backup is selected. This button functions like the Restore functionality, with the exception that it uses that specific prerestore Backup.

- **Refresh List** button: Populates the Backup Configuration Files list with the description of each Backup that resides on the host computer. The description text is preceded by a formatted date and time stamp of the Backup creation time.
Manage

The Manage page allows the agent to delete a previously saved configuration, as well as Rename the description of any Configuration Backup.

On Windows 2000 and later, the initial backup configuration can only be deleted when the user who is logged on has administrator privileges.

- **Backup Configuration Files**: Select a saved configuration file from the list. Each entry in the list represents the contents of a Backup previously created by using the Backup function.

- **Delete** button: Click to remove the entry from the Backup Configuration Files list. All files stored as part of that Backup are erased from the host computer.

- **Rename** button: Modify any listed Configuration Backup description.

- **Refresh List** button: Populates the Backup Configuration Files list with the description of each Backup that resides on the host computer. The description text is preceded by a formatted date and time stamp of the Backup creation time.
System Info

The System Info tool displays three pages (Overview, Processes and Applications) that summarize the configuration and the processes and applications currently running on the remote computer. The **Copy All** button at the bottom of each tab allows the agent to capture a list of the displayed information to a text file.
Reboot

The Reboot option allows an agent to reboot the client's computer remotely, if the client accepts the agent's reboot request.

When the agent chooses to remotely Reboot the client’s computer, and the agent has the access rights to restart the computer, the client will see the prompt at right.

After the agent clicks Yes, the client sees the reboot request. If the client clicks Yes before the request times out (30 seconds), the computer reboots.

If the remote computer is running Windows Vista, or if the Remote Support Server otherwise determines the agent cannot conduct unattended support after a reboot, the agent will see the following message as a reminder to tell the customer to log back in after the reboot.

NOTE
The Remote Client Service can only be started after a permission-based reboot and terminates when the session ends. It cannot be started manually. It also will not start if the remote user’s access rights do not allow services to start.
Launching a Client Session

There are two ways to connect to a Remote Support Session as a client:

- From the Queue tab (below)
- From the Agents tab (page 113)

To connect to a Remote Support Session from the Queues tab:

1. After connecting to your Remote Support server, click **PUBLIC AREA**. The following Web page appears.

2. Select the **Queues** tab to view a list of available Queues.

   There is only one queue named Default. Users who have administrator authority (Remote Support Admin) and the system administrator (Superadmin) can create additional queues on this server.

3. Click the appropriate link to join a Queue.

A blank form appears, as shown in the example on the next page.
4. Complete the information for the online form, and then click **Continue**. The information you enter in the form will be viewable by the agent.

5. If you have not done so already, you are prompted to install the latest version of Collaboration Client. See page 13 for installation instructions. After the Client is installed, you are connected to the selected Queue and a Web page appears.

6. When you have successfully joined a Remote Support session, the client console appears on your desktop. The client console contains a user keyboard chat window, as described in “Using the Remote Support Client Console” on page 115.

**To connect to a Remote Support Session from the Agents tab:**

1. After connecting to your Remote Support server, click **PUBLIC AREA** in the navigation pane. The following Web page appears.

   2. Select the **Agents** tab to view a list of available Agents.
3. Click the **Join Meeting** link. One of the following occurs:
   - If you have a pop-up blocker, this page appears. Click **Join Meeting**.
   - If you do not have a pop-up blocker, the Remote Support Client console opens and you join the session.
Using the Remote Support Client Console

After joining a session, Remote Support clients will see the Client console displayed on their desktop, as shown below.

By default, only the chat window is displayed. You can format the text by selecting the bold, italics, or underline buttons.

When the agent launches tools such as Screen Sharing or Videoconferencing, these appear in separate docked windows.

To separate the Chat tab from the Client console, double-click the title bar. After it is undocked, you can resize the window by dragging a corner with your cursor. For more information, see “Undocking and Docking Tools” on page 84.
Troubleshooting Tip and FAQs

This chapter provides information on troubleshooting a browser, and it provides frequently asked questions (FAQs) for Web Conferencing and Remote Support.

Troubleshooting Browser Issues

Spam filters on e-mail clients can cause delivery problems with meeting invitations. If meeting invitees experience difficulty with receiving invitations, check the spam filter settings or use the filter tools to allow delivery from the domain being used.

Spyware and adware that change your home page or other settings can also cause problems with Web Conferencing and Remote Support, including, but not limited to, slow response or incorrect page destinations. If you are experiencing browser problems that do not seem to be related to the tips mentioned in this section, run a utility that detects and removes spyware and adware.

Frequently Asked Questions (FAQs)

This section includes some of the most frequently asked questions (FAQs) for Web Conferencing and Remote Support. Refer to this section before you contact your system administrator or your local authorized provider.

Q1: How can I locate the serial number and verification key for my installed products?

A1: The system administrator (superadmin) can view this information in the License Table. To locate this table, access Database Admin under Basic System Administration.

Q2: How can I set up a link to Remote Support queues from another Web page?

A2: The file “Gethelp_example.asp” automatically installs with Remote Support and provides information on how to create a link to a specific queue. You can locate this file on your server at: http://<yourdomain>/interactivedemo/gethelp_example.asp

Q3: What if I don't want the Agent Console to “pop up” when a new support request comes into the queue?

A3: The new collaboration client includes preference settings for queues that allow the agent to set audio alerts, console “pop-up” and focus behavior. Each agent can change their own preferences through the agent console.

Q4: How can I tell which version of the software that I’m running?

A4: The superadmin can view the administration option “Install History” under System Configuration. Users can also see the version number, which is located at the bottom of the navigation menu on the left side of the home page.
Q5: Was Application Sharing removed from Web Conferencing?

A5: No; the new Host Console interface consolidates similar functions under one control called “Screen Sharing.” By default, a dialog box prompts you to choose between “Desktop Sharing” and “Application Sharing.” You can skip the initial dialog box by setting your preferences for screen sharing.

Q6: What happened to Document Manager and File Transfer?

A6: The new Host Console interface consolidates similar functions under one control called “Files.” By default, a dialog box prompts you to choose between “File Transfer” and “Document Manager.” You can skip the initial dialog box by setting your preferences for files.

Q7: How can I modify the e-mail invitation text that is sent by the Collaboration server?

A7: The file “Invite_Email_EN.txt” is installed on your Collaboration server and contains the text used for e-mail invitations. Instructions for customizing your e-mail are included within the text file.

Q8: How can I change the link for the home page graphic to point to my site, instead of the default site?

A8: Although the UI wizard allows you to customize the image, changing the URL it links to would require custom development.

Q9: To conserve bandwidth and increase performance, I would like to change the default color depth used for screen sharing. Is that possible?

A9: Yes, “colors” is a preference setting for screen sharing. If these preferences have not been set, the host/agent will see an initial dialog box prompting them to choose a screen sharing mode (desktop sharing or application sharing) as well as the color depth (256, 16-bit or 24-bit).

Q10: What versions of SQL will work; what mode is needed?

A10: The requirements are detailed in the installation manual. Windows authentication mode (aka mixed mode) must be enabled on SQL servers. The versions that are confirmed to date include MSDE 2000, SQL 2000 with SP4 and SQL 2005 Express. SQL 2007 will also be tested prior to GA.

Q11: In previous versions of WCRS, it was possible to customize the banner graphic within the e-mail invitation. This no longer appears to be supported, or is it?

A11: The e-mail banner functionality has been disabled for some time to lower the spam score. This allows more users and invitees to receive e-mail invitations in their inbox.

Q12: In previous versions, the timeout setting for the browser test needed to be modified to accommodate satellite connections. Is this still necessary?

A12: No, because the browser test has been modified to accommodate the new collaboration client and no longer uses the same timeout parameters.
Q13: What is the difference between registration modes found under “Collaboration Config?”

A13: There are four modes that determine whether users can create their own accounts, whether the administrator is notified of newly created accounts, and whether those accounts are active or inactive until the administrator is notified. Depending on which mode is chosen, a “Register” button may appear on the home page. More detailed information is available in the installation guide. Only the superadmin can modify the registration mode.

Q14: The Attendee window sometimes shows a message that contains the word “flushed.” What does this mean?

A14: The Collaboration server includes the ConnectionPoint, which essentially manages connections and data flow between meeting/session attendees. If too much incremental data is cached, either at the ConnectionPoint or at the attendee's browser, the cache is eventually flushed resulting in a “flushed server” or “flushed user” message. When the cache is flushed, a full update replaces all cached incremental updates so that all attendees stay in pace with the rest of the meeting/session.

Q15: Will this new release support the customizations I've made to .asp pages for the previous version?

A15: Any modifications to .asp pages will be lost when upgrading to V5.0. Parameters formerly stored in various .asp pages are now combined into a single master file. This change was necessary to accommodate new functionality related to “feature availability” and the new collaboration client. Although many of the same parameters are still available, some are not (for example, permissions prompts in Remote Support is not configurable through this new master file).

Q16: How do I know when a chat is private?

A16: Private chat now appears in a separate window with “Private Chat” in the title bar. Even when both public chat and private chat windows are undocked, it is easy to distinguish them.

Q17: With public and private chat appearing in two different windows, which is recorded when the recording preference is set to record keyboard chat?

A17: When the record preferences are set to capture keyboard chat, it records all keyboard chat that the meeting host is a party to. That is, it records all public and private chat that appears in the host’s keyboard chat windows. It does not capture private chat between participants. Save buttons are located on public and private chat windows so that anyone can save the history of keyboard chat in a text file.

Q18: How does streaming audio work? Is it good for a conference?

A18: PC-based voice chat requires a sound card with current drivers for your operating system, a speaker and a microphone (headset recommended). The host can launch voice chat at any time. In Web Conferencing, it launches in half-duplex mode and requires the host to enable the microphone for participants (adding one at a time is strongly recommended). In Remote Support, voice chat launches in full duplex mode because sessions are generally one-to-one.
Q19: What if I want streaming audio for some calls, and regular audio for others?

A19: PC-based voice chat is a standard feature of Web Conferencing and Remote Support and is always available to the host/agent unless it is specifically disabled by the administrator. WCRS V5.0 does not integrate with any communications platforms directly, but Web Conferencing does include fields for a teleconference number and teleconference password to be included in the e-mail invitation for a meeting.

Q20: What OS is required for the server?

A20: Web Conferencing v5.0 and Remote Support v5.0 will run on Microsoft Windows 2000 Server with IIS, or Microsoft Windows 2003 Server with IIS. Only 32-bit server operating systems have been tested in our labs. For more information, please refer to the installation guide.

Q21: Can I provide my own server?

A21: Yes, standalone Web Conferencing v5.0 and Remote Support v5.0 are sold as software-only solutions. The installation manual includes the minimum server hardware requirements along with some recommendations for additional RAM and processing power for larger installations. Mitel offers optional low-end and high-end servers for customers who want to purchase a complete system.

Q22: What are the server requirements?

A22: The minimum server requirements are based upon a dedicated server with a 10 concurrent connection license of Web Conferencing installed:

Pentium 4, 1.0 GHz processor, 256MB RAM, running either Windows 2000 Server (SP3) or Windows 2003 Server (SP1) with Microsoft Internet Information Services v5.0 or later, one static IP address, port 80 for the Web site, port 443 for the ConnectionPoint service and 760Kbps for 10 concurrent connections (roughly 56Kbps per connection plus 20Kbps per connection for network overhead). Please review the requirements section of the installation manual for additional information regarding larger installations and non-dedicated server environments.

Q23: What desktop Operating Systems are supported for clients?

A23: Windows 2000 Workstation, Windows XP (all editions) and Windows Vista (all editions)

Q24: Is Mac supported?

A24: No. The Collaboration Client is designed specifically for Microsoft Windows operating systems as noted above. Some Mac models can run in windows emulation mode and some support running multiple operating systems including Windows XP and Vista. These configurations, though potentially functional, are not supported.

Q25: Can WCRS support Web Servers other than IIS? What about open source?

A25: Web Conferencing v5.0 and Remote Support v5.0 are designed to work with Microsoft Internet Information Services v5.0 or later only and will not support other Web Servers. Customers who prefer Linux may want to consider IAWC to fulfill audio and Web conferencing needs simultaneously.
**Q26:** How can I make the videoconferencing window bigger? Will it support full screen mode?

**A26:** Yes, video can be undocked from the main console, resized and relocated anywhere on the desktop. You can also maximize the window to fill the screen. The resolution is controlled by the video preference setting for raw image size and cannot exceed 288 x 352 pixels.

**Q27:** I want to use the video in my conference room. What higher-end cameras can you recommend?

**A27:** Most webcams and cameras that connect directly to your PC or laptop can be used for videoconferencing, provided that Windows recognizes these as video capture devices. The webcams specifically tested in our quality assurance lab include: Intel® Deluxe PC Camera CS330, Creative Labs CT6840 USB Video Blaster® WebCam III, Logitech QuickCam® Fusion, Logitech QuickCam® for Notebooks Pro, Logitech Labtec® Webcam Pro, Creative Labs WebCam Live! Motion and Logitech QuickCam® 8.3.0.

**Q28:** Can we make videoconferencing appear more “real-time” in the larger resolution?

**A28:** WCRS supports frame rates up to 30 frames per second (fps) which is the highest frame rate supported by any webcam. Video is sent at the frame rate specified, regardless of the webcam capacity to support it. If a webcam supports a lower frame rate than the one specified in the video preferences, additional frames will be sent to achieve the specified frame rate. Other factors that affect real-time performance include the number of attendees, the raw image size chosen, the frame rate chosen by each participant and the available bandwidth. Lower frame rates than 30 fps can potentially provide better performance because less data is being sent.

**Q29:** What is Document Manager and how does it work?

**A29:** Document Manager is similar to a FTP utility with a graphical user interface. It allows authorized users to upload files to the public folder for public access. These files can also be uploaded to the private folder for personal use. It also provides a session folder for use during online meetings. Recordings are also stored in the public and private folders when saved to the Collaboration server.

**Q30:** I want to show only a portion of my screen, can I move the screen sharing window to the area I want to show? How?

**A30:** Yes, simply drag the lower right corner of the screen sharing window to resize it, or choose the appropriate standard size from the settings menu. To relocate the window, use the four-way cursor located at the bottom of the screen sharing window. For more information about these tools, please refer to the host quick reference guide or user guide.
**Q31:** Am I required to use the installable client, or can I still choose to use the JAVA client? If not, why?

**A31:** The installable collaboration client is required for this version of WCRS. In addition to improving connectivity and performance, it also provides numerous enhancements and new functions that are not supported by Java. These include user-defined preference settings for host/agent controls and queues, auto scaling windows, unattended support that allows agents to log on to remote PCs after reboot and Vista support.

**Q32:** How does the Host or Agent show their agent/host controls to the attendees during training/presentation?

**A32:** To avoid confusion while engaging users online, screen sharing preferences allow the host/agent to hide specific host/agent control windows from the participant’s view. For Web Conferencing, these include the Attendees, Keyboard Chat, Video, Document Manager and Polling. For Remote Support, these include Attendees, Keyboard Chat, Video and Queues. The host/agent can choose to show these control windows to participants by changing the preference settings for “Screen Sharing” through the host/agent console.

**Q33:** Can I create a custom layout for the host/agent controls?

**A33:** Yes, you can undock and rearrange menus, toolbars and tabbed windows displayed within the client area to customize your layout. Note that only the menu bar and toolbars will retain the undocked custom location (preferences, host/agent feature controls, recorder and voice). All other windows will launch docked within the main console client area (for example attendees, public keyboard chat, polling, video). For more information, please refer to the user guide or online help.

**Q34:** Has video been modified in any way for this release?

**A34:** Yes, it is now possible to launch videoconferencing without activating voice chat. This is particularly helpful when using a traditional audio conference. In addition, the video window now supports auto scaling so that it can be undocked and resized to fill the entire screen.

**Q35:** Has voice chat been modified in any way for this release?

**A35:** Yes. Preference settings for video allow you to specify whether voice should launch automatically with video. In addition, the codec has been changed to ADPCM to enhance the voice quality and to provide support for Vista. This doubles the required bandwidth from roughly 2Kbps to 4Kbps.

**Q36:** What does the client install look like and how big is it?

**A36:** The new client requires an executable file to be downloaded and installed. The initial download is shown as “Collaboration_Client.exe” (40.1K). The executable file will download and install all necessary components for the latest version of the collaboration client as well as the collaboration player. When installed, the collaboration client is roughly 4MB, although this size will potentially change as the client is updated throughout the beta process.
Q37: What happens if I'm using an older version of collaboration client from WCRS v4.5 that is integrated with Unified Communicator v4.0?

A37: The new collaboration client is v2.0. The Java-based installable collaboration client included with previous versions is detected as collaboration client v1.x. When the new collaboration client detects an older version on a system, it automatically removes the old client version and installs the new version. You will need to reinstall the original collaboration client for use with WCRS v4.5 that is integrated with Unified Communicator. You will only need to do this once, because the new collaboration client will not uninstall or install anything if it detects the latest version of the collaboration client on the system.

Q38: Can I install WCRS v5.0 on my existing Unified Communicator v4.0 server to update the integrated collaboration software based on WCRS v4.0?

A38: No. The integration of WCRS v4.5 within Unified Communicator v4.0 required a number of modifications to work in “UC mode.” These modifications are not part of WCRS v5.0. A future release of Unified Communicator will incorporate WCRS v5.0.

Q39: Can WCRS and IAWC co-exist on the same server?

A39: No, they require different operating systems and Web servers. WCRS is based upon Windows technology, while IAWC is based upon Linux.

Q40: If I don't like WCRS v5.0, can I roll back to v4.5?

A40: When WCRS v5.0 is installed on your server, it will add new information to the existing SQL database. If you later uninstall WCRS v5.0, it will not remove any of the new database information, which may affect the previous version in ways that have not been identified. We strongly recommend backing up your existing server and database so that these can be restored if necessary.

Q41: Do I need an Axxess or an Mitel 5000 system?

A41: No, the WCRS v5.0 software is “standalone” which means that it does not interoperate directly with any communications platform. When scheduling a Web conference, users can specify a teleconference number and password (access code) generated from any system.