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Chapter 1: Getting Started with Sametime

Imagine that you are talking to a coworker who is halfway across the world. You are talking without using a telephone, and you can see each other as though you were in the same room. Now imagine that your coworker opens a document that you are both working on, and you can see it and make changes to it. Without a fax machine. Without e-mail.

You can stop imagining.

With IBM® Lotus® Sametime®, you can meet with anyone, anywhere, anytime. You can collaborate with your coworkers in many ways, including:

• Sending chat messages and transferring files to your coworkers in real time
• Communicating with computer audio and video
• Editing shared files and saving your changes
• Sending Web pages and poll questions to meeting participants
• Recording your meeting so that other people can view it later

Sametime Features

Read the Lotus Sametime User’s Guide to learn more about the following components of Sametime.

• **The Sametime Welcome Page:** Includes links to all of the components of Sametime. To reach the Sametime Welcome page, enter the following address in a Web browser: http://servername, where servername is the name of the Sametime server.

  **Tip** You must enter the fully qualified Domain Name System (DNS) name of the server. For example, if your server is http://www.sametime.com, you must enter the full name; you cannot enter “sametime” or “sametime.com.” (See your administrator if you do not know the fully qualified DNS name of the server.)

• **The Meeting Center:** Allows you to schedule and attend Sametime meetings.
The Meeting Room: Allows you to participate in a meeting. The Meeting Room includes a list of meeting participants, an area for shared information (such as a presentation), an area for computer audio and video, and an area to send chat messages, view poll responses, and view Web pages sent by the Moderator.

IBM Lotus Sametime Connect: Allows you to chat with your online colleagues. You can also start instant meetings and transfer files from Sametime Connect.

Sametime Discussions and TeamRooms: Allow you to organize your projects before attending an online meeting. For example, you can keep all of your documents for a project in an IBM Lotus Sametime TeamRoom®, or you can use a Sametime Discussion to keep track of your online conversations about a project.

Sametime Meetings
Although there are many differences between a Sametime meeting and a face-to-face meeting, the same principles apply to both. Everyone in the meeting needs to:

• Prepare for the meeting.
• Ensure that the meeting is effective.
• Complete any necessary tasks after the meeting has ended.

The Lotus Sametime User’s Guide helps you ensure that your online meeting is easy to conduct and as effective as a face-to-face meeting.

Preparing for a Meeting
Before using Sametime for the first time, you should:
1. Make sure your computer includes the required hardware and software.
2. Make sure your browser works with Sametime.
3. Register to use Sametime, if necessary.
4. Review information about logging on to Sametime and working with passwords.
5. Attend a test meeting to make sure that Sametime is working properly. If you have audio or video equipment, you should test it during the test meeting.
6. Download the Meeting Room and handle any security warnings during the download.
7. Make sure you are comfortable working with Sametime Connect.
8. Review the information about working with Sametime meetings.

For more information, see the topics later in this chapter, as well as the topics in Chapter 2, Using Sametime Connect; Chapter 3, Preparing to Use Audio and Video; and Chapter 4, Working with Sametime.
Having an Effective Meeting

Most meetings have a leader who conducts the meeting and makes sure it goes smoothly. Others in the meeting are usually observers who occasionally contribute to the meeting through conversation or presentations. The meeting leader and the participants play different roles in ensuring an effective meeting.

In Sametime, the leader of a meeting is known as the Moderator. The Moderator is responsible for conducting the meeting and sending information to the participants. See Chapter 8, Moderating a Meeting, for more information about a Moderator’s tasks and responsibilities.

Everyone else in a meeting is a participant. Participants might contribute to the meeting by using the available tools in the meeting to interact with the other participants. For example, participants can present information with the whiteboard (a blank board that allows you to present files or sketch designs) or screen sharing (a feature that allows you to share your screen or a program on your computer). For more information, see Chapter 5, Participating in a Meeting; Chapter 6, Presenting Information in a Meeting; and Chapter 7, Communicating in a Meeting.

Finishing a Meeting

The necessary tasks for finishing a Sametime meeting depend on the choices that were available for the meeting. For example, you might want to save a whiteboard presentation from the meeting. After the meeting is over, you might be able to view a recording of the meeting or listen to a recorded telephone conference call. See Chapter 9, Finishing a Meeting, for details.

Sametime Discussions and TeamRooms

Discussions and TeamRooms allow you to keep track of your documents and team discussions. You might want to use a Discussion or a TeamRoom to supplement your Sametime meetings. See Chapter 10, Using Sametime Discussions and TeamRooms, for more information.

Note: The Sametime User’s Guide also contains information about the Enterprise Meeting Server (EMS). The EMS is not a part of Sametime 3.0. See your system administrator for more information.

Getting Started with Sametime

Imagine that you are talking to a coworker who is halfway across the world. You are talking without using a telephone, and you can see each other as though you were in the same room. Now imagine that your coworker opens a document that you are both working on, and you can see it and make changes to it. Without a fax machine. Without e-mail.
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**Sametime Meetings**

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- Prepare for the meeting.
- Ensure that the meeting is effective.
- Complete any necessary tasks after the meeting has ended.

The *Lotus Sametime User’s Guide* helps you ensure that your online meeting is easy to conduct and as effective as a face-to-face meeting.

**Preparing for a Meeting**

Before using Sametime for the first time, you should:

1. Make sure your computer includes the required hardware and software.
2. Make sure your browser works with Sametime.
3. Register to use Sametime, if necessary.
4. Review information about logging on to Sametime and working with passwords.
5. Attend a test meeting to make sure that Sametime is working properly. If you have audio or video equipment, you should test it during the test meeting.
6. Download the Meeting Room and handle any security warnings during the download.
7. Make sure you are comfortable working with Sametime Connect.
8. Review the information about working with Sametime meetings.

For more information, see “Using Sametime Connect,” “Preparing to Use Audio and Video,” and “Working with Sametime Meetings.”

**Having an Effective Meeting**

Most meetings have a leader who conducts the meeting and makes sure it goes smoothly. Others in the meeting are usually observers who occasionally contribute to the meeting through conversation or presentations. The meeting leader and the participants play different roles in ensuring an effective meeting.

In Sametime, the leader of a meeting is known as the Moderator. The Moderator is responsible for conducting the meeting and sending information to the participants. See “Moderating a Meeting” for more information about a Moderator’s tasks and responsibilities.
Everyone else in a meeting is a participant. Participants might contribute to the meeting by using the available tools in the meeting to interact with the other participants. For example, participants can present information with the whiteboard (a blank board that allows you to present files or sketch designs) or screen sharing (a feature that allows you to share your screen or a program on your computer). See “Participating in a Meeting,” “Presenting Information in a Meeting,” and “Communicating in a Meeting” for more information.

**Finishing a Meeting**

The necessary tasks for finishing a Sametime meeting depend on the choices that were available for the meeting. For example, you might want to save a whiteboard presentation from the meeting. After the meeting is over, you might be able to view a recording of the meeting or listen to a recorded telephone conference call.

**Sametime Discussions and TeamRooms**

Sametime Discussions and TeamRooms allow you to keep track of your documents and team discussions. You might want to use a Discussion or a TeamRoom to supplement your Sametime meetings.

**Note** The Sametime User's Guide also contains information about the Enterprise Meeting Server (EMS). The EMS is not a part of Sametime 3.0. See your system administrator for more information.

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**What’s New in Sametime 3.1**

The table below summarizes the most important new features and enhancements available in Sametime 3.1.

<table>
<thead>
<tr>
<th>Feature or Enhancement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Transfer</td>
<td>Instantly send files to meeting participants and people in your contact list.</td>
</tr>
</tbody>
</table>

continued
<table>
<thead>
<tr>
<th>Feature or Enhancement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sametime Connect</td>
<td><strong>External Communities:</strong> If your system administrator allows, you can use Sametime to communicate with people connected to your company’s extranet.</td>
</tr>
<tr>
<td></td>
<td><strong>Specific Alerts:</strong> Play a sound or display a message when specific people in your contact list become Active.</td>
</tr>
<tr>
<td></td>
<td><strong>Announcements:</strong> Send brief, informational instant messages that do not require a response.</td>
</tr>
<tr>
<td></td>
<td><strong>Online Status Icons:</strong> There are new icons to represent your online status, including icons for mobile users who access Sametime from cell phones or pagers.</td>
</tr>
</tbody>
</table>
|                                      | **Logon Preferences for Sametime Connect and AOL Instant Messenger**
|                                      | SM: The Logon Information tab has been removed from Sametime Connect. You can still log on automatically to both Sametime Connect and AOL Instant Messenger. |
|                                      | **Automatic Reconnection:** Sametime Connect for browsers can now automatically reconnect to the server when you are disconnected, just like Sametime Connect for the desktop. |
The following terms have changed with this release of Sametime:

- **Automatic nicknames** are now short names.
- **The Connect List** is now the contact list.

Terminology

- When you access your company's Directory, you now see both full and short names.

Schedule and attend Sametime meetings directly from your Outlook® or IBM Lotus Notes® e-mail client.

The Meeting Room offers improved accessibility with mnemonics, shortcut keys, and the ability to tab through the Meeting Room controls.

- **Test a Meeting**: Now you can attend a test meeting to make sure that you are able to connect to meetings and that your audio/video equipment works properly.
- **Whiteboard Files**: With Sametime 3.0, the Moderator can add files to the whiteboard at any time during a meeting.
- **Broadcast Meetings**: Broadcast meeting audience members can now view poll questions, receive Web pages sent by the Moderator, and copy and save Meeting Room chat.
- **Interaction Tabs**: During broadcast meetings and recorded meetings, the tabs flash briefly to alert participants to new content, such as shared poll responses or chat messages.
- **Video Windows**: Float the video windows so that you can move them anywhere on your screen.
- **360-degree Camera**: Use the TotalView High Res 360-degree video camera from BeHere Technologies to view 360-degree video during a meeting.
- **Echo Cancellation**: Now you can use microphones that do not include headsets without causing echoes during meetings. The audio preferences allow you to enable echo cancellation.
- **Meeting Clock**: Monitor the progress of a meeting with two new menu options: View - Elapsed Meeting Time and View - Remaining Meeting Time.

Accessibility

- The Meeting Room offers improved accessibility with mnemonics, shortcut keys, and the ability to tab through the Meeting Room controls.

Schedule and attend Sametime meetings from Outlook or Lotus Notes

- Schedule and attend Sametime meetings directly from your Outlook® or IBM Lotus Notes® e-mail client.

Directory dialog box

- When you access your company's Directory, you now see both full and short names.

Terminology

- The following terms have changed with this release of Sametime:
  - Automatic nicknames are now short names.
  - The Connect List is now the contact list.
What You Need to Use Sametime

The requirements for using Sametime 3.1 and Sametime Connect are described below.

General Requirements

Sametime requires one server computer for Sametime installation that meets these requirements:

- **CPU**: Pentium® II 400MHz (or higher)
- **Operating system**: Windows® 2000 with Service Pack 2
- **Memory**:
  - **Windows 2000**: 1 GB RAM recommended; 512MB minimum
  - **Disk space**: 1GB+ free disk space recommended to allow space for meetings; 500MB minimum
  - **Disk swap space**: 64MB
- **Browser**: Microsoft Internet Explorer 6.0 or Netscape 7
  - **Microsoft Internet Explorer 6.0**: Sametime clients can operate in a Microsoft Internet Explorer 6.0 browser running its native Virtual Machine (VM) or the Sun Microsystems Java VM 1.4.1 (and the 1.4.1 Java Plug-in).
  - **Netscape 7**: Sametime clients can operate in a Netscape 7 browser that uses the Sun Microsystems Java VM 1.4.1 and Java Plug-in 1.4.1. By default, Netscape 7 includes JVM 1.4.0 which is not supported by Sametime. Netscape 7 users must manually install the Sun Microsystems JVM 1.4.1 (and 1.4.1 Java Plug-in) to use Netscape 7 browsers with Sametime.

The Sun Microsystems Java VM 1.4.1 and Java Plug-in 1.4.1 is available at [www.sun.com](http://www.sun.com).

- **Network software**: TCP/IP network software installed

**Caution** Ensure that the administrator who is logging on to Windows 2000 to perform the installation has full administration rights. If not, Sametime will not be installed properly.

Client requirements

The client system requirements for operation with the Sametime server (and Multimedia Services) include:

- **CPU**: Pentium II 266MHz (or higher)
- **Operating system**: 
• Windows 2000 Professional SP2
• Windows XP

• **Browser:** Microsoft Internet Explorer 6.0 or Netscape 7
  - **Microsoft Internet Explorer 6.0** - Sametime clients can operate in a Microsoft Internet Explorer 6.0 browser running its native Virtual Machine (VM) or the Sun Microsystems Java VM 1.4.1 (and the 1.4.1 Java Plug-in).
  - **Netscape 7** - Sametime clients can operate in a Netscape 7 browser that uses the Sun Microsystems Java VM 1.4.1 and Java Plug-in 1.4.1. By default, Netscape 7 includes JVM 1.4.0 which is not supported by Sametime. Netscape 7 users must manually install the Sun Microsystems JVM 1.4.1 (and 1.4.1 Java Plug-in) to use Netscape 7 browsers with Sametime.

    The Sun Microsystems Java VM 1.4.1 and Java Plug-in 1.4.1 is available at www.sun.com.

• **RAM:** 128 MB RAM or higher for Windows 2000 Professional or Windows XP

**Audio Requirements**

• **Sound Card:** Full-duplex sound card. (You can use a half-duplex card to attend broadcast meetings as an audience member or to listen to a recorded meeting.) See “Supported Sound Cards and Cameras” and “Testing and Configuring Your Sound Card” for more information.

• **Microphone and Speakers:** A high-quality microphone and speakers are recommended. A headset that contains a boom microphone performs best. If you use a desktop microphone, a unidirectional dynamic microphone with batteries is best. Avoid microphones with on and off switches, unless you are sure that the microphones are well-made.

  **Note** If you use a microphone that does not include a headset, you should use echo cancellation so that other meeting participants do not experience echo and feedback problems.

  **Tip** Test your audio and video to ensure that your microphone, speakers, and video camera function properly. You can test your audio and video when you test a meeting. To test a meeting, click Test Meeting in the Meeting Center, or choose Options - Test Meeting in Sametime Connect.

**Video Requirements**

No special software or hardware is required to receive video, but the following are needed to send video:
• **Video-Capturing Software:** Video for Windows

• **Camera:** A high-quality Universal Serial Bus (USB) or Personal Computer Memory Card International Association (PCMCIA) PC camera. Do not use parallel port cameras with Sametime. See “Supported Sound Cards and Cameras” for more information.

**Tip** Test your audio and video to ensure that your microphone, speakers, and video camera function properly. You can test your audio and video when you test a meeting. To test a meeting, click Test Meeting in the Meeting Center, or choose Options - Test Meeting in Sametime Connect.

**Screen Resolution**

Sametime clients should use a screen resolution of 1024x768.

---

**Accessibility Features**

Sametime supports the following methods of alternative access:

• Standard Windows accessibility features.

• Keyboard access to most Sametime features:
  • Keyboard shortcuts for commonly used functions. Shortcut keys allow you to quickly access menu options by pressing a combination of keys instead of using your mouse or the arrow keys to move through menus.
  • Mnemonics for menu options and dialog boxes. You can press these keys instead of clicking your mouse to activate menu options or fields.
  • Press TAB (to move forward) and SHIFT+TAB (to move backward) to move through radio buttons, check boxes, and other controls in the Meeting Room.
  • Press ENTER to activate links and buttons in the Meeting Room.
  • Use the spacebar to activate radio buttons and check boxes in the Meeting Room.
  • Use the arrow keys to move through radio buttons, check boxes, and drop-down lists in Sametime Connect.
  • Sametime documentation is available in PDF format for downloading or printing. You can find the documentation at the following Web site: http://notes.net. Click the Doc Library button, and then click the link to search for documentation by product. Click the Sametime link to locate the Sametime 3.0 documentation.

**Tip** For best accessibility, use Sametime Connect for the desktop. Sametime Connect for browsers does not support mnemonics and some shortcut keys. See “Determining Which Version of Sametime Connect You Are Using” for more information.
Shortcut Keys

Shortcut keys allow you to quickly access menu options by pressing a combination of keys instead of using your mouse or the arrow keys to move through menus. The following tables list the shortcut keys available in Sametime. To activate a menu option, press the appropriate combination of shortcut keys on your computer’s keyboard.

Shortcut Keys in the Meeting Center

The table below lists shortcuts that are available when you are scheduling meetings in the Meeting Center.

<table>
<thead>
<tr>
<th>Button or Tab</th>
<th>Shortcut Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essentials tab</td>
<td>ALT+1</td>
</tr>
<tr>
<td>Files tab</td>
<td>ALT+2</td>
</tr>
<tr>
<td>Security tab</td>
<td>ALT+3</td>
</tr>
<tr>
<td>Tools tab</td>
<td>ALT+4</td>
</tr>
<tr>
<td>Locations tab</td>
<td>ALT+5</td>
</tr>
<tr>
<td>Save button</td>
<td>ALT+S</td>
</tr>
</tbody>
</table>

Shortcut Keys in the Meeting Room

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Shortcut Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit - Copy Chat</td>
<td>CTRL+C</td>
</tr>
<tr>
<td>Edit - Paste Chat</td>
<td>CTRL+V</td>
</tr>
<tr>
<td>Edit - Clear Chat</td>
<td>DELETE or CTRL +L</td>
</tr>
<tr>
<td>Edit - Select All</td>
<td>CTRL+A</td>
</tr>
<tr>
<td>Edit - Delete all objects in the Whiteboard</td>
<td>CTRL+DELETE</td>
</tr>
<tr>
<td>Tools - Raise Hand</td>
<td>CTRL+H</td>
</tr>
<tr>
<td>Tools - Switch to Whiteboard</td>
<td>CTRL+W</td>
</tr>
<tr>
<td>Tools - Switch to Screen Sharing</td>
<td>CTRL+SHIFT+N</td>
</tr>
<tr>
<td>Tools - Let Others Control or Edit My Screen</td>
<td>CTRL+E</td>
</tr>
<tr>
<td>Tools - Control Screen Sharing</td>
<td>CTRL+R</td>
</tr>
<tr>
<td>Tools - Stop Sharing</td>
<td>CTRL+G</td>
</tr>
<tr>
<td>Tools - Audio - Increase Speaker Volume</td>
<td>CTRL+I</td>
</tr>
<tr>
<td>Tools - Audio - Decrease Speaker Volume</td>
<td>CTRL+SHIFT+I</td>
</tr>
<tr>
<td>Undo Full Screen</td>
<td>ESCAPE</td>
</tr>
<tr>
<td>To start a new line when typing Meeting Room chat messages (There is no menu option for this function.)</td>
<td>SHIFT+ENTER</td>
</tr>
</tbody>
</table>
Shortcut Keys in Sametime Connect

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Shortcut Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>To start a new line when typing chat messages (There is no menu option for this function.)</td>
<td>SHIFT+ENTER</td>
</tr>
<tr>
<td>People - Add</td>
<td>INSERT</td>
</tr>
<tr>
<td>Restore a minimized Sametime Connect window</td>
<td>CTRL+ALT+C</td>
</tr>
</tbody>
</table>

Mnemonics

Like shortcut keys, mnemonics allow you to quickly access menu options or fields by pressing a key on your keyboard instead of using your mouse or the arrow keys to move through menus and dialog boxes. While shortcut keys work any time, mnemonics work only when the appropriate menu or dialog box is already active.

For example, when you are in a meeting, you can increase the volume of your speakers in any of the following ways:

- **Manually choosing the menu option**: Choose Tools - Audio - Increase Speaker Volume.
- **Using the keyboard shortcut**: Press CTRL+I.
- **Using mnemonics**: Press the following mnemonics in this order: T to activate the Tools menu, U to activate the Audio option, and P to activate the Increase Speaker Volume option.

The mnemonic is usually the underlined letter in a menu, menu option, or dialog box. Press the mnemonic letter on your keyboard to activate the menu option or to place your cursor in a specific field.

The mnemonics in the Meeting Room are not underlined. See the topics below for a list of the mnemonics that are available in each type of meeting:

- “Mnemonics in the Sametime Meeting Room”
- “Mnemonics in Broadcast Meetings”
- “Mnemonics in Recorded Meetings”
Mnemonics in the Meeting Room

The following tables list mnemonics and shortcut keys for menu options that are available during Collaboration Meetings, Moderated Presentations or Demos, and instant meetings. These menu options are also available to presenters during broadcast meetings. Mnemonics are underlined. When applicable, shortcut keys are listed after menu options.

**Note** Some menu options appear only for the Moderator, participants with permission to speak, or participants with permission to edit/share.

### Meeting Menu

<table>
<thead>
<tr>
<th>Main Menu Option</th>
<th>Pull-Right Menu Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invite Others...</td>
<td></td>
</tr>
<tr>
<td>Meeting Details</td>
<td></td>
</tr>
<tr>
<td>People</td>
<td>• New Chat</td>
</tr>
<tr>
<td></td>
<td>• New Audio Meeting</td>
</tr>
<tr>
<td></td>
<td>• New Video Meeting</td>
</tr>
<tr>
<td></td>
<td>• New Sharing Meeting</td>
</tr>
<tr>
<td></td>
<td>• New Collaboration Meeting</td>
</tr>
<tr>
<td></td>
<td>• Send File</td>
</tr>
<tr>
<td></td>
<td>• Participants’ A/V Tools</td>
</tr>
<tr>
<td></td>
<td>• Add to Contact List</td>
</tr>
<tr>
<td>Save</td>
<td>• Meeting Room Chat</td>
</tr>
<tr>
<td></td>
<td>• Whiteboard</td>
</tr>
<tr>
<td>Change Duration</td>
<td></td>
</tr>
<tr>
<td>End Meeting</td>
<td></td>
</tr>
<tr>
<td>Leave Meeting</td>
<td></td>
</tr>
</tbody>
</table>

### Edit Menu

<table>
<thead>
<tr>
<th>Menu Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy Chat CTRL+C</td>
</tr>
<tr>
<td>Paste Chat CTRL+V</td>
</tr>
<tr>
<td>Clear Chat CTRL+L</td>
</tr>
<tr>
<td>Select All CTRL+A</td>
</tr>
</tbody>
</table>
### View Menu

<table>
<thead>
<tr>
<th>Main Menu Option</th>
<th>Pull-Right Menu Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Toolbar</td>
<td></td>
</tr>
<tr>
<td>Whiteboard Tools</td>
<td></td>
</tr>
<tr>
<td>Interaction Tabs</td>
<td>• All Tabs</td>
</tr>
<tr>
<td></td>
<td>• Meeting Room Chat Tab</td>
</tr>
<tr>
<td></td>
<td>• Web Page Tab</td>
</tr>
<tr>
<td></td>
<td>• Poll Tab</td>
</tr>
<tr>
<td>Participant List Column</td>
<td>• Participant List Details</td>
</tr>
<tr>
<td></td>
<td>• Entire Column</td>
</tr>
<tr>
<td></td>
<td>• Audio Controls</td>
</tr>
<tr>
<td></td>
<td>• Video Windows</td>
</tr>
<tr>
<td>Sort Participant List By</td>
<td>• Raised Hands</td>
</tr>
<tr>
<td></td>
<td>• Speaker</td>
</tr>
<tr>
<td></td>
<td>• Moderator</td>
</tr>
<tr>
<td></td>
<td>• Who is Sharing</td>
</tr>
<tr>
<td></td>
<td>• Who Has Permission to Edit/Share</td>
</tr>
<tr>
<td></td>
<td>• Who Has Permission to Speak</td>
</tr>
<tr>
<td>Default Layout</td>
<td></td>
</tr>
<tr>
<td>Elapsed Meeting Time</td>
<td></td>
</tr>
<tr>
<td>Remaining Meeting Time</td>
<td></td>
</tr>
</tbody>
</table>

### Tools Menu

<table>
<thead>
<tr>
<th>Main Menu Option</th>
<th>Pull-Right Menu Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tools</td>
<td></td>
</tr>
<tr>
<td>Raise Hand CTRL+H</td>
<td></td>
</tr>
<tr>
<td>Lower All Hands</td>
<td></td>
</tr>
<tr>
<td>Lower Selected Hands</td>
<td></td>
</tr>
</tbody>
</table>

*continued*
<table>
<thead>
<tr>
<th>Main Menu Option</th>
<th>Pull-Right Menu Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switch to Whiteboard</td>
<td></td>
</tr>
<tr>
<td>CTRL+W</td>
<td></td>
</tr>
<tr>
<td>Switch to Screen Sharing</td>
<td></td>
</tr>
<tr>
<td>CTRL+SHIFT+N</td>
<td></td>
</tr>
<tr>
<td>Share a Program</td>
<td></td>
</tr>
<tr>
<td>Share My Entire Screen</td>
<td></td>
</tr>
<tr>
<td>Share Part of My Screen with a Frame</td>
<td></td>
</tr>
<tr>
<td>Let Others Control or Edit My Screen CTRL+E</td>
<td></td>
</tr>
<tr>
<td>Control Screen Sharing</td>
<td></td>
</tr>
<tr>
<td>CTRL+R</td>
<td></td>
</tr>
<tr>
<td>Stop Sharing CTRL+G</td>
<td></td>
</tr>
<tr>
<td>Attach a File to the Whiteboard...</td>
<td></td>
</tr>
<tr>
<td>Poll the Meeting Participants</td>
<td></td>
</tr>
<tr>
<td>Show Responses to Everyone</td>
<td></td>
</tr>
<tr>
<td>View Individual Responses</td>
<td></td>
</tr>
<tr>
<td><strong>Audio</strong></td>
<td><strong>Increase Microphone Volume</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Decrease Microphone Volume</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Increase Speaker Volume</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Decrease Speaker Volume</strong></td>
</tr>
<tr>
<td></td>
<td><strong>CTRL+SHIFT+I</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Request Microphone</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Release Microphone</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Mute My Microphone</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Mute My Speakers</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Switch to Request Microphone</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Switch to Automatic Microphone</strong></td>
</tr>
<tr>
<td><strong>Video</strong></td>
<td><strong>Pause Speaker’s Video</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Pause My Video</strong></td>
</tr>
<tr>
<td><strong>Audio/Video Preferences...</strong></td>
<td></td>
</tr>
</tbody>
</table>

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Permissions Menu

<table>
<thead>
<tr>
<th>Main Menu Option</th>
<th>Pull-Right Menu Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Give Microphone to Next Person</td>
<td></td>
</tr>
<tr>
<td>Grant</td>
<td>• All Permissions</td>
</tr>
<tr>
<td></td>
<td>• Permission to Speak</td>
</tr>
<tr>
<td></td>
<td>• Permission to Edit/Share</td>
</tr>
<tr>
<td>Grant to Everyone</td>
<td>• All Permissions</td>
</tr>
<tr>
<td></td>
<td>• Permission to Speak</td>
</tr>
<tr>
<td></td>
<td>• Permission to Edit/Share</td>
</tr>
<tr>
<td>Revoke</td>
<td>• All Permissions</td>
</tr>
<tr>
<td></td>
<td>• Permission to Speak</td>
</tr>
<tr>
<td></td>
<td>• Permission to Edit/Share</td>
</tr>
<tr>
<td>Revoke from Everyone</td>
<td>• All Permissions</td>
</tr>
<tr>
<td></td>
<td>• Permission to Speak</td>
</tr>
<tr>
<td></td>
<td>• Permission to Edit/Share</td>
</tr>
<tr>
<td>Switch Meeting Moderator</td>
<td></td>
</tr>
</tbody>
</table>

Help Menu

<table>
<thead>
<tr>
<th>Menu Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help Topics</td>
</tr>
<tr>
<td>About Sametime</td>
</tr>
</tbody>
</table>

Mnemonics in Broadcast Meetings

The following table lists mnemonics and shortcut keys for menu options that are available to audience members during broadcast meetings. (Presenters can use the more extensive menus available in the Meeting Room.) Mnemonics are underlined. When applicable, shortcut keys appear after menu options.

<table>
<thead>
<tr>
<th>Menu</th>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting</td>
<td>• Meeting Details</td>
</tr>
<tr>
<td></td>
<td>• Save - Meeting Room Chat</td>
</tr>
<tr>
<td></td>
<td>• Leave Meeting</td>
</tr>
<tr>
<td>Edit</td>
<td>• Copy Chat CTRL+C</td>
</tr>
<tr>
<td></td>
<td>• Select All CTRL+A</td>
</tr>
</tbody>
</table>

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The following table lists mnemonics and shortcut keys for menu options that are available during recorded meetings. Mnemonics are underlined. When applicable, shortcut keys appear after menu options.

<table>
<thead>
<tr>
<th>Menu</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting</td>
<td>• Meeting Details</td>
</tr>
<tr>
<td></td>
<td>• Save - Meeting Room Chat</td>
</tr>
<tr>
<td></td>
<td>• Leave Meeting</td>
</tr>
<tr>
<td>Edit</td>
<td>• Copy Chat CTRL+C</td>
</tr>
<tr>
<td></td>
<td>• Select All CTRL+A</td>
</tr>
</tbody>
</table>

---

### Mnemonics in Recorded Meetings

The following table lists mnemonics and shortcut keys for menu options that are available during recorded meetings. Mnemonics are underlined. When applicable, shortcut keys appear after menu options.
<table>
<thead>
<tr>
<th>Menu</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>• Fit Shared Area to Window</td>
</tr>
<tr>
<td></td>
<td>• Make Shared Area Full Screen</td>
</tr>
<tr>
<td></td>
<td>• Float Video Window</td>
</tr>
<tr>
<td></td>
<td>• Audio/Video Column</td>
</tr>
<tr>
<td></td>
<td>• Audio Controls</td>
</tr>
<tr>
<td></td>
<td>• Display Web Pages and Polls in New Windows</td>
</tr>
<tr>
<td></td>
<td>• Interaction Tabs - All Tabs</td>
</tr>
<tr>
<td></td>
<td>• Interaction Tabs - Meeting Room Chat Tab</td>
</tr>
<tr>
<td></td>
<td>• Interaction Tabs - Web Page Tab</td>
</tr>
<tr>
<td></td>
<td>• Interaction Tabs - Poll Tab</td>
</tr>
<tr>
<td>Tools</td>
<td>• Play</td>
</tr>
<tr>
<td></td>
<td>• Pause</td>
</tr>
<tr>
<td></td>
<td>• Stop</td>
</tr>
<tr>
<td></td>
<td>• Fast Forward (Increments of 5 sec)</td>
</tr>
<tr>
<td></td>
<td>• Rewind (Decrements of 5 sec)</td>
</tr>
<tr>
<td></td>
<td>• Increase Speaker Volume CTRL+I</td>
</tr>
<tr>
<td></td>
<td>• Decrease Speaker Volume CTRL+SHIFT+I</td>
</tr>
<tr>
<td>Help</td>
<td>• Help Topics</td>
</tr>
<tr>
<td></td>
<td>• About Sametime</td>
</tr>
</tbody>
</table>

**Testing a Meeting**

Before attending your first meeting, attend a test meeting to make sure that Sametime is functioning correctly.

**Tip** If you only want to test your audio and video, click the “Test your Audio/Video” link in the “Test a Meeting” window immediately after the meeting test begins, or choose Options - Preferences in the Sametime Connect window, select the Audio/Video tab, and click Test My Audio/Video Tools.

To test a meeting:

1. Do one of the following:
   - From Sametime Connect, choose Options - Test Meeting.
   - From the Meeting Center, click Test Meeting.
2. A new browser window appears on your screen. Test instructions appear on the left side of the window. A small version of the Meeting Room should appear on the right side of the window. If the Meeting Room does not appear:

- If this is your first time testing a meeting, you might see some Security Warnings. Click Yes or OK in the warning dialog boxes to continue with the test. See “How to Handle Security Warnings” for more information.
- Your browser might not be set correctly for Sametime (for example, you might need to enable cookies). If you need to change a browser setting, instructions for correcting the problem appear in the “Test a Meeting” window. See “Making Your Browser Work with Sametime” for more information about the correct browser settings.
- You might need to install a recommended browser.
- You might not be connecting to the Sametime server. If a connection problem prevents you from downloading the Meeting Room, follow the instructions on the left side of the Test Meeting window.

3. After the Meeting Room appears in the Test Meeting window, follow the instructions on the left side of the window to ensure that:

- You can connect to a meeting. If one or more errors prevent you from connecting to a meeting, click Save As in the Status Details dialog box to save the error messages and then e-mail them to your system administrator.
- You are using a recommended browser.
- Your system settings are configured optimally for Sametime.
- You can download the Meeting Room and quickly attend Sametime meetings.
- Your audio and video equipment is functioning correctly.

4. When you have finished testing, click Done. You are now ready to attend a real meeting.

---

**Making Your Browser Work With Sametime**

To make your browser work with Sametime:

- Ensure that your browser meets the Sametime requirements.
• Ensure that your browser is enabled to accept cookies. Cookies are small files that Sametime stores on your computer. These files tell Sametime that you are authorized to attend certain meetings. For example, if your browser does not accept cookies, you cannot attend password-protected meetings.

• Ensure that the following options are enabled in your browser’s preferences:
  • Java™
  • ActiveX® Controls (Microsoft Internet Explorer only)
  • JavaScript™ (Netscape Communicator only)
  • Plug-ins (Netscape Communicator only)
  • SmartUpdate (Netscape Communicator only)

• You might need to configure your browser to use a proxy server. If so, obtain the server name and port number from your system administrator, and then set up your browser to use the proxy server. Consult your system administrator before changing any proxy settings.

• If you are using Netscape Communicator, you must close and restart your browser after you:
  • Download the Meeting Room for the first time. You download the Meeting Room when you attend a meeting, view a recorded meeting, or test a meeting.
  • Launch Sametime Connect for browsers for the first time.

**Note** If your browser is not correctly set for Sametime, you receive errors when you test a meeting or attend your first meeting.

### Registering to Use Sametime

Your system administrator might require you to register before you can create and attend scheduled meetings, view recorded meetings, or use Sametime Connect. If a Register link appears on the Sametime Welcome page, you can register by choosing your own user name and password.

To register:

1. Click Register on the Sametime Welcome page.
2. Click “Register to use Sametime.”
3. Enter the required information. The name you enter becomes your user name. Your user name appears in the contact list in Sametime Connect and in the Participant List and other areas when you attend meetings. The password is your logon password for Sametime and Sametime Connect. Remember this password because it does not appear anywhere else. See Passwords for more information about the passwords associated with Sametime.

4. Click Submit Request.

5. Click the Sametime logo to return to the Sametime Welcome page.

**Note** If the Register link does not appear on the Sametime Welcome page, you must obtain your user name and password from your system administrator.

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**Downloading the Meeting Room**

The first time you attend a meeting, view a recorded meeting, or test a meeting, you must download the Meeting Room.

To download the Meeting Room to your computer:

1. Do one of the following:
   - If you are attending a meeting or viewing a recorded meeting for the first time, find and click the meeting name in the Meeting Center.
   - If you are testing a meeting, click Test Meeting in the Meeting Center or choose Options - Test Meeting in Sametime Connect.

2. Handle the security warnings as instructed for your browser. The Meeting Room is installed on your computer. You are attending the meeting when you see your name in the Participant List. (If the meeting has a password, you must enter the password before you can attend.)

   **Note** If you use Netscape Communicator to attend your first meeting, you must restart your browser after downloading the Meeting Room.

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**How to Handle Security Warnings**

You might see security warnings when you:

- Download the Meeting Room.
- Start Sametime Connect for the desktop and agree to test your audio and video.
- Launch Sametime Connect for browsers.
- Click “Attend a Meeting” or click a meeting name in the Meeting Center.
• Click Test Meeting in the Meeting Center or choose Options - Test Meeting in Sametime Connect.

• View a recorded meeting.

• Accept an invitation to an instant meeting.

• Access your company's Directory. The Directory is a master list of all people associated with your company. Your system administrator maintains the Directory. You might access the Directory when you:
  • Add a name to your contact list, the Who Can See If I Am Online list, an instant meeting invitation, or an announcement
  • Invite other people to a meeting
  • Choose presenters for a Broadcast Meeting
  • Choose a Moderator for a scheduled meeting
  • Restrict a meeting to specific participants

The security warnings inform you that you are about to download a program to your computer. You must accept these warnings before you can use Sametime. The text in the warnings depends on the version of the browser that you use, but should be similar to the following:

• **Microsoft Internet Explorer**: The dialog box is called Security Warning. Select the check box in front of “Always trust content from Lotus Development Corporation,” and then click Yes. There are two warnings; follow this procedure for both.

• **Netscape Communicator**: The dialog box is a Java Security warning. Select the check box in front of “Remember this decision,” and then click Grant. There are two warnings; follow this procedure for both.

**Note** If you do not select “Always trust content from...” (Microsoft Internet Explorer) or “Remember this decision” (Netscape Communicator), you see the security warnings every time you perform an action such as attending a meeting or accessing your company’s Directory.

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**Logging on to Sametime**

Your system administrator might require you to log on to Sametime before you can create and attend scheduled meetings or view recorded meetings. You are always required to log on in the following situations:

• **To become the Moderator**: The Moderator must log on to Sametime when attending the meeting. Participants who have not logged on cannot become the Moderator during the meeting.
• **To schedule a meeting:** In most cases, the creator of the meeting must log on to Sametime when scheduling the meeting. If you do not log on to Sametime, you are unable to choose a meeting Moderator. See “Moderating a Meeting” for more information.

In most cases, you should log on before attending or scheduling Sametime meetings even if you are not required to do so. By logging on, you ensure that other participants can easily identify you during meetings and that you can become the Moderator if necessary.

**Note** You must also log on whenever you use Sametime Connect. Logging on to Sametime Connect is a separate procedure that does not affect your logon status for the Meeting Center.

**Logging On**

Follow these steps to log on:

1. Click “Attend a Meeting” or “Schedule a Meeting” on the Sametime Welcome page. If the logon dialog box or page appears, skip to step 3.
2. If the logon dialog box or page does not appear automatically, click “Log on to Sametime.” The link appears in the upper right of your screen.
3. Enter your user name and password and click OK. If you do not have a user name and password, you must register to use Sametime or obtain a user name and password from your administrator.

**If You Do Not Log On to Sametime**

If you do not log on to Sametime:

• You cannot become the Moderator of a meeting.
• You cannot properly schedule meetings.
• You are represented by a default name (such as user1/guest) in the Meeting Room. This default name appears in the following places:
  • The Participant List and Participant List details
  • The Moderator’s individual poll responses window
  • When you control a shared screen, the initials of the default name appear next to the cursor.

Your system administrator determines the default name. If your administrator allows you to customize the default name, a dialog box appears when you attend a meeting without logging on to Sametime. Enter a name for yourself and click OK. Entering a customized default name does not log you on to Sametime.
Passwords

Sametime uses the following passwords to secure your meetings and other information:

- **Sametime and Sametime Connect Logon Password:** This password is assigned by your system administrator or chosen by you when you register to use Sametime. If registration is available in your version of Sametime, you can change your password at any time, even if your administrator assigned it to you. See “Changing Your Password” for more information. Sametime and Sametime Connect use the same user name and password.

  **Note** If you do not see a Register link on the Sametime Welcome page, you must get your user name and password from your system administrator.

- **Sametime Meeting Password:** The meeting creator can enter a password for the meeting on the Security tab of the New Meeting page. Participants must enter the meeting password before attending the meeting or accessing the meeting details. (The password protects everything on the Meeting Details page, including recordings and attached files.)

- **Sametime MeetingPlace™ User Password:** If a meeting includes a MeetingPlace telephone conference call, the meeting creator enters a MeetingPlace user name and password to create the conference call.

- **Telephone Conference Call Password:** If a meeting includes a MeetingPlace telephone conference call, the meeting creator can enter an ID and password for the telephone conference call. To attend a meeting that includes a password-protected telephone conference call, participants call MeetingPlace and enter the conference call password on the telephone keypad.

- **AOL Instant Messenger Password:** If you access AOL Instant Messenger through the Sametime Connect window, you must use the screen name and password that you obtained when you registered with AOL Instant Messenger.

- **Proxy Server Password:** If you use a proxy server with Sametime, you might need a user name and password to access the proxy server. Contact your system administrator for more information.

Changing Your Password

If registration is available in your version of Sametime, you can change the password that you use to log on to Sametime and Sametime Connect at any time.
time, even if your administrator assigned it to you. See “Passwords” for more information about the other passwords associated with Sametime.

To change your logon password:

1. Click Register on the Sametime Welcome page.
2. Click “Change your password.”
3. If you have not already logged on to Sametime, the log on dialog box might appear. Enter your user name and password in the dialog box, and then click OK.
4. Enter your old password in the “Old password” field.
5. Enter your new password in the “New password” field.
6. Enter your new password again in the “Re-type new password” field.
7. Click Submit Request.
8. Click the Sametime logo to return to the Sametime Welcome page.

**Note** If you do not see a Register link on the Sametime Welcome page, you cannot change your password. You must get your password from your system administrator.

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**Customization by the Administrator**

The *Lotus Sametime User’s Guide* describes all Sametime features, but your Sametime server might not include all of these features. Your system administrator can customize Sametime to suit your company’s needs.

Your system administrator can customize the following elements of Sametime:

**Registration, Logging On, and Passwords**

- Enable or disable registration. If registration is enabled, you create your user name and logon password for Sametime and Sametime Connect. If registration is disabled, your system administrator assigns your user name and password.

- Require the following:
  - Participants to log on to use Sametime. If you must log on and registration is disabled, you can obtain a user name and password from your system administrator.
  - Participants to log on before attending or scheduling meetings.
  - Participants who do not log on to Sametime to customize their default names.
Tools

- Remove the following:
  - Polling
  - Send Web pages
  - Meeting Room chat
  - Screen sharing
  - The whiteboard
  - Computer audio
  - Computer video
  - NetMeeting®
  - Announcements
  - File transfer

**Note** Tools can be removed after a meeting that uses the tools is scheduled. For example, you might select screen sharing when you create a meeting. If your administrator disables screen sharing before the meeting starts, screen sharing is unavailable during the meeting.

- Determine the following:
  - How screen sharing is used. For example, the administrator can disable the ability to allow other participants to control a shared screen.
  - Whether participants can save whiteboard files during meetings.
  - Whether users can schedule meetings from Lotus Notes or Outlook.

Sametime Connect

- Determine the following:
  - Which version(s) of Sametime Connect you can use: Sametime Connect for the desktop or Sametime Connect for browsers.
  - Whether to automatically include the “Sametime Plug-in for Microsoft NetMeeting Meetings Using a Netscape Browser” with Sametime Connect for the desktop so that you download both programs at once.
  - Whether to log all chat conversations.
- Enable or disable the following:
  - Access to AOL Instant Messenger from the Sametime Connect window.
  - The ability to send announcements.
  - The ability to automatically log on to Sametime Connect and AOL Instant Messenger.
The ability to save proxy and logon information.

The Connectivity tabs for Sametime Connect and AOL Instant Messenger. Enable or disable the ability to include External users in your contact list.

Automatic encryption of certain data during instant meetings. Meeting Room chat and file transfers are always encrypted, but your system administrator decides whether to automatically encrypt other data such as whiteboard attachments, screen sharing, polls, and Web pages sent by the Moderator. If your administrator does not automatically encrypt this data, you can encrypt it by selecting “Secure meeting” in the Start Instant Meeting dialog box.

MeetingPlace Telephone Conference Calls

- Determine that MeetingPlace telephone conference calls are not available for meetings.
- Decide how you must schedule telephone conference calls. For example, the meeting creator might need to enter a MeetingPlace ID and password.
- Decide how you must attend telephone conference calls. For example, you might enter your own phone number so that MeetingPlace calls you, or you might dial a telephone number for the meeting.

Meeting Control

- Automatically add all participants' names to the Meeting Details page after the meeting is over.
- Remove the “Broadcast Presentation or Demo” meeting type.
- Determine whether you must enter the number of participants when scheduling a meeting.
- Ensure that all meetings are automatically protected with encryption. The encryption check box is not visible on the Security tab of the New Meeting page when all meetings are automatically encrypted.
- Require passwords for all meetings.
- Allow participants to use a telephone to attend the audio portion of audio/video meetings.
- Automatically extend all meetings by a designated number of minutes. For example, the administrator can automatically extend all meetings by 15 minutes. If the administrator does not automatically extend all meetings, your meeting automatically ends at the designated time, and you lose any unsaved meeting information (such as an annotated whiteboard file).
• Determine that meetings are not recorded if space on the server is limited. This can result in a meeting that is only partially recorded.

• Remove the ability to record meetings.

• Import a recorded meeting to a specific server. For example, an administrator can import a recorded meeting to the server www.sametime.com. You can enter www.sametime.com in your browser and view the recording of the meeting, even if the meeting took place on a different server.

• Determine whether you see the Sametime Welcome page.

• Determine whether you can use Sametime Discussions and TeamRooms.

• Enable or disable the ability to transfer files.

• Specify a maximum size allowed for transferred files.

Locations

• Allow you to enable a meeting on multiple servers.

• Determine whether meetings can occur on servers within your organization, external to your organization, or both.

Expanded Sametime Functionality

Your system administrator can incorporate Sametime features into other software programs or additional areas of Sametime. This expanded functionality lets you send instant messages and start instant meetings from any place that you see green names: e-mail messages, the Meeting Center, or other programs.

The Enterprise Meeting Server (EMS)

Your system administrator determines whether or not your organization uses the Enterprise Meeting Server (EMS). The EMS is not a part of Sametime 3.0. If you use the EMS:

• The Meeting Center includes new features, such as a search field that allows you to search for meetings by meeting name and Moderator name.

• Self registration, Sametime Discussions and TeamRooms, and MeetingPlace telephone conference calls are not available.
Using Different Language Versions of Sametime

The Meeting Room always appears in your computer operating system’s local language, so you can always read the menu options and controls. Other Sametime components, such as the Meeting Center, appear in the language used by the server, which might be different from your operating system’s language. If meeting participants speak different languages or use keyboards designed for different languages, you might see text in different languages and characters sets on the whiteboard, in a shared screen, or in the chat transcript area.

For example, if you work in Tokyo and use Japanese as your operating system language, you might attend a meeting that occurs on an English Sametime server in the United States. The Meeting Center appears in English, but once you attend the meeting, the Meeting Room appears in Japanese. If some participants have English keyboards and some participants have Japanese keyboards, either language might be used to annotate a whiteboard file or enter chat messages. Participants might share a screen that includes either Japanese or English characters.

To ensure the best performance when you attend multi-lingual Sametime meetings, follow these guidelines:

- Make sure that the language used by the Sametime server is enabled in your operating system’s language preferences or settings. Contact your system administrator for assistance with this procedure.
- To properly display text entered on the whiteboard and in private chats started from the Participant List, make sure your browser displays a Unicode font and add Unicode Font Aliases to the Java Virtual Machine (JVM) in your computer’s registry. Contact your system administrator for help with these procedures.
- Use Print Capture to attach Asian language files for display on the whiteboard during meetings that occur on servers that use non-Asian languages. For example, if you want to present a Chinese file on the whiteboard during a meeting that occurs on an English server, use Print capture to convert the file for whiteboard display.
- If possible, avoid allowing another participant to control a shared screen if the participant and the person sharing the screen use keyboards designed for different languages. For example, if Fiona, who uses an English keyboard, shares her screen and allows Pierre, who uses a French keyboard, to control the shared screen, the text might not display properly. Because the keys on Fiona’s and Pierre’s keyboards are arranged differently, Fiona’s computer cannot properly display the text Pierre enters.
• If possible, use Sametime Connect for browsers so that multilingual characters will display correctly during chats. For example, if you use Sametime Connect for browsers, Chinese characters will display correctly in your chat window even if your computer’s operating system does not support Chinese characters. You must use a Unicode system font to enable this feature. See your system administrator for more information.

• If possible, use IBM Lotus Translation Services for Sametime (LTSS) to instantly translate chat messages from people who speak languages that you cannot read. LTSS is a separate product that is not automatically included with Sametime. Contact your system administrator for information about LTSS.

If your browser continues to display certain language characters incorrectly or if you continue to experience problems when you attend multi-lingual meetings, contact your system administrator.
Chapter 2: Using Sametime Connect

Sametime Connect allows you to find your coworkers online and send them instant messages. You can also start instant meetings that include audio and video, screen sharing, a whiteboard, and other collaborative tools.

The following terms will help you get started with Sametime Connect:

- **Alert**: A visual cue or sound that Sametime Connect uses to inform you of events such as incoming instant messages. See “Using Alerts” later in this chapter for more information. Sametime Connect uses two kinds of alerts:
  - **General alerts**: Notify you when new instant meeting invitations, chat messages, or announcements arrive, and give you feedback when you add new names to your contact list. See “Setting General Alerts” later in this chapter for more information.
  - **Specific alerts**: Allow you to play a sound or display a message whenever specific people in your contact list become Active. See “Setting Specific Alerts” later in this chapter for more information.

- **Announcement**: A brief, informational instant message that does not require a response. For example, you might send everyone in your department an announcement to remind them that an important meeting will start in five minutes. See “Sending Announcements” later in this chapter for more information.

- **Chat**: A real-time text conversation. You can chat with any of your online colleagues. Once a chat starts, anyone can invite other online people to join the chat. See “Chatting with People in Your Contact List” later in this chapter for more information.

- **Chat transcript**: A text log of a chat conversation. With Sametime Connect for the desktop, chat participants can save chat transcripts to their computers. Sametime Connect for browsers cannot save transcripts. See “Saving Meeting Information” in Chapter 9, “Finishing a Meeting,” for more information.

- **Connectivity**: The way that your computer connects to a server. See “Using Sametime Connectivity Preferences” and “Setting Preferences for AOL Instant Messenger Connectivity” later in this chapter for more information.
• **Contact list:** A list of your colleagues. You create your contact list. You can maintain multiple contact lists, transfer contact lists to other computers, and share your contact lists with other people. See “Creating and Maintaining the Contact List” later in this chapter for more information.

• **Directory:** A master list of all people associated with your company. Your system administrator maintains your company’s Directory. You access the Directory when you add names to your contact list or invite people to instant meetings. See “Searching for Names in the Directory” later in this chapter for more information.

• **Full names:** Names that include server addresses (for example, Gina Brown/NYC/Acme). AOL Instant Messenger users and external users do not have full names. Only people in your company’s Directory can have full names. Your system administrator creates the full names in your company’s Directory. See “Displaying Full Names or Short Names” later in this chapter for more information.

• **Groups:** People in your contact list are organized in groups. See “Adding a Group to the Contact List” later in this chapter for more information. The two types of groups are:
  
  • **Personal groups:** Groups that you define. You can add people from the company’s Directory, AOL Instant Messenger users, or external users to your personal groups.
  
  • **Public groups:** Groups from your company’s Directory. Your system administrator defines the contents of public groups. AOL Instant Messenger users and external users do not appear in public groups.

• **Instant chat meeting:** A private chat session that includes three or more people.

• **Instant meeting:** An unscheduled meeting that includes two or more people. You can start instant meetings from any place that you see green names: Sametime Connect, the Participant List of a meeting, or a Discussion or TeamRoom. Instant meetings can include any combination of chat, audio, video, screen sharing, the whiteboard, and other collaborative tools. See “Working with Instant Meetings” in Chapter 4, “Working with Sametime Meetings,” for more information.

• **Nicknames:** Unique names that you give to people in your contact list. For example, if your contact list contains two people named John Smith, you can assign a different nickname to each person. Nicknames appear only in your contact list; other people cannot see the nicknames. See “Using Nicknames” later in this chapter for more information.

• **Online status:** Your online status tells other people if you are available for online chats and instant meetings. See “Managing Your Online Status” later in this chapter for more information.
• **Online status message:** The text that appears when people point to your name in the contact list. You can use the default online status messages or create customized ones. See “Customizing Your Online Status Messages” later in this chapter for more information.

• **Short names:** Names that do not include server addresses (for example, Gina Brown). Your system administrator creates short names in your company's Directory. See “Displaying Full Names or Short Names” later in this chapter for more information.

• **Who Can See If I Am Online list:** A privacy feature that allows you to determine which people can see your name when you are online. See “Determining Who Sees You Online” later in this chapter for more information.

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**Using Sametime Connect**

Sametime Connect allows you to find your coworkers online and send them instant messages. You can also start instant meetings that include audio and video, screen sharing, a whiteboard, and other collaborative tools.

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  • **Specific alerts:** Allow you to play a sound or display a message whenever specific people in your contact list become Active. See “Setting Specific Alerts” for more information.

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• **Chat transcript**: A text log of a chat conversation. With Sametime Connect for the desktop, chat participants can save chat transcripts to their computers. Sametime Connect for browsers cannot save transcripts. See “Saving Meeting Information” for more information.

• **Connectivity**: The way that your computer connects to a server. See “Using Sametime Connectivity Preferences” and “Setting Preferences for AOL Instant Messenger Connectivity” for more information.

• **Contact list**: A list of your colleagues. You create your contact list. You can maintain multiple contact lists, transfer contact lists to other computers, and share your contact lists with other people. See “Creating and Maintaining the Contact List” for more information.

• **Directory**: A master list of all people associated with your company. Your system administrator maintains your company’s Directory. You access the Directory when you add names to your contact list or invite people to instant meetings. See “Searching for Names in the Directory” for more information.

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• **Groups**: People in your contact list are organized in groups. See “Adding a Group to the Contact List” for more information. The two types of groups are:
  - **Personal groups**: Groups that you define. You can add people from the company’s Directory, AOL Instant Messenger users, or external users to your personal groups.
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• **Nicknames**: Unique names that you give to people in your contact list. For example, if your contact list contains two people named John Smith, you can assign a different nickname to each person. Nicknames appear only in your contact list; other people cannot see the nicknames. See “Using Nicknames” for more information.

• **Online status**: Your online status tells other people if you are available for online chats and instant meetings. See “Managing your Online Status” for more information.

• **Online status message**: The text that appears when people point to your name in the contact list. You can use the default online status messages or create customized ones. See “Customizing Your Online Status Messages” for more information.

• **Short names**: Names that do not include server addresses (for example, Gina Brown). Your system administrator creates short names in your company’s Directory. See “Displaying Full Names or Short Names” for more information.

• **Who Can See If I Am Online list**: A privacy feature that allows you to determine which people can see your name when you are online. See “Determining Who Sees You Online” for more information.

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**Downloading Sametime Connect**

Sametime Connect comes in two slightly different versions. Your system administrator determines which version that you can use. You obtain both versions of Sametime Connect from the Sametime Welcome page of your server.

**Downloading and Installing Sametime Connect for the Desktop**

Follow these steps to download Sametime Connect and install it on your computer.

1. Go to the Sametime Welcome page by entering the following URL in your browser, where servername is the fully qualified domain name system (DNS) name of your server:

   http://servername

   If you do not know the name of the server, contact your system administrator.

2. Click Download.

3. Click the link to download Sametime Connect for the desktop.

4. Do one of the following:
• If you are using Microsoft Internet Explorer, select “Save this program to disk” in the File Download dialog box and click OK. In the Save As dialog box, choose a location to save the file and click Save.

• If you are using Netscape Communicator and the Unknown File Type dialog box appears, click “Save File.” In the Save As dialog box, choose a location to save the file and click Save.

5. Follow the installation instructions that appear on the screen.

6. When the "Choose a Sametime server name" dialog box appears, enter the fully qualified DNS name (for example, acme.com) or Internet Protocol (IP) address (a series of numbers and periods) of the server. If you do not have this information, contact your system administrator.

7. Click Next.

8. Click Finish.

9. If you are upgrading to a new version of Sametime Connect, restart your computer. If you are installing Sametime Connect for the first time, restarting is not necessary.

**Note** When you start Sametime Connect for the first time, you can test your audio and video equipment by automatically attending a test meeting in which you are the only participant. If you test your audio and video, you download the Meeting Room, which requires accepting security warnings.

### Launching Sametime Connect for Browsers

Follow these steps to begin using Sametime Connect for browsers:

1. Go to the Sametime Welcome page by entering the following URL in your browser, where servername is the fully qualified domain name system (DNS) name of your server:

   http://servername

   If you do not know the name of the server, contact your system administrator.

2. Click Launch Sametime Connect.

3. If necessary, accept the security warnings. For more information about security warnings, see “How to Handle Security Warnings.”

4. If you are using Netscape Communicator, close and restart your Web browser.

5. Log on to Sametime Connect to begin using it right away.
Working with Sametime Connect

Sametime Connect allows you to find your coworkers online and send them instant messages. You can also start instant meetings that include audio and video, screen sharing, a whiteboard, and other collaborative tools.

See the topics below for more information:

- “Determining Which Version of Sametime Connect You Are Using”
- “Starting and Exiting Sametime Connect”
- “Logging On and Setting Connectivity Preferences”
- “Creating and Maintaining the Contact List”
- “Managing Your Online Status”
- “Sending Instant Messages”
- “Transferring Files”
- “Working with Instant Meetings”
- “Customizing Your Instant Meeting Invitations”
- “Using Alerts”
- “Sametime Connect and AOL Instant Messenger”
- “Defining Your Audio and Video Tools”
- “Managing the Sametime Connect Window”
- “Accessing Other Areas of Sametime”

Determining Which Version of Sametime Connect You Are Using

Sametime Connect comes in two slightly different versions: Sametime Connect for the desktop and Sametime Connect for browsers. Your system administrator determines which version you have. To determine which version of Sametime Connect you are using, look at the title bar of the Sametime Connect window:

- 📝 If you see a Sametime Connect icon in the upper left corner of the Sametime Connect window, you are using Sametime Connect for the desktop.
- 🌍 If you see an icon for Microsoft Internet Explorer or Netscape, you are using Sametime Connect for browsers.

The table below describes features that are unique to the specific versions of Sametime Connect:
**With Sametime Connect for the desktop, you can...**

- Use accessibility features like mnemonics.
- Exchange messages with AOL Instant Messenger users (if your organization permits it).
- Save chat transcripts on your computer for later reference.
- Automatically start Sametime Connect whenever you start your computer.
- Automatically change your online status to Active or Away based on your mouse and keyboard usage.
- Rearrange your contact list by dragging and dropping names.
- Show or hide the Sametime Connect status bar.
- Show or hide the Sametime Connect button in your taskbar.
- Choose whether or not the Sametime Connect window always appears on top of other windows on your screen.
- To use Sametime Connect for the desktop, you must first download it from the Sametime Welcome page and install it on your computer.

**With Sametime Connect for browsers, you can...**

- Use Sametime Connect from any computer with Internet access.
- View multilingual characters during chats. For example, Chinese characters will display correctly in your chat window even if your computer’s operating system does not support Chinese characters. You must use a Unicode system font to enable this feature. See your system administrator for more information.
- The Sametime Connect status bar is always visible, but contains less information than the status bar in Sametime Connect for the desktop.
- The Sametime Connect button is always visible in your taskbar.
- To start Sametime Connect for browsers, click “Launch Sametime Connect” on the “Welcome to Sametime” Welcome page.

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**Starting and Exiting Sametime Connect**

To start Sametime Connect:

- **Sametime Connect for the desktop**: Choose Sametime Connect from your computer’s start menu.
- **Sametime Connect for browsers**: Click Launch Sametime Connect on the Sametime Welcome page.

**Starting Sametime Connect Automatically**

If you use Sametime Connect for the desktop, you can start Sametime Connect automatically whenever you turn on your computer by choosing Options - “Launch at Startup.” A check mark appears next to the menu option. This feature is especially useful if you automatically log on to Sametime Connect.

**Note** This feature is not available with Sametime Connect for browsers.
Exiting Sametime Connect

When you exit Sametime Connect, you are automatically logged off. If you access AOL Instant Messenger directly through the Sametime Connect window, exiting Sametime Connect also ends your AOL Instant Messenger session.

You can exit Sametime Connect in any of the following three ways:

- Choose People - Exit.
- Click the close button in the upper right corner of the Sametime Connect title bar.
- Right-click the Sametime Connect tray icon at the bottom of your screen and choose Exit.
- Right-click the Sametime Connect task bar button at the bottom of your screen and choose Close. See "Managing the Sametime Connect Window" for information about displaying the Sametime Connect button in your task bar.

Note All open chat windows are automatically closed when you exit Sametime Connect.

Logging on and Setting Connectivity Preferences

See the topics below for more information about logging on to Sametime Connect and managing your connection to the server:

- “Logging on to Sametime Connect”
- “Reconnecting Manually to Sametime Connect”
- “Using Sametime Connectivity Preferences”

Logging on to Sametime Connect

When you start Sametime Connect, the "Log On to Sametime" dialog box appears automatically. To save time, you can choose to automatically log on so that you do not need to enter your log on information each time you start Sametime Connect.

The first time you log on, you see a default personal group called "Work" that contains only your name in green text. The green text indicates that you are online.
Follow these steps to log on:

1. Enter your user name.
2. Enter your password.
3. (Optional) Select “Automatically log me on” to log on automatically whenever you start Sametime Connect. You will not need to enter your user name and password when you start Sametime Connect in the future. This feature is especially useful if you automatically start Sametime Connect whenever you turn on your computer. If this check box is disabled, contact your system administrator.
4. (Optional) If necessary, you can change your Sametime connectivity preferences by clicking Connectivity. In most cases, you should be able to use the default values.
5. Click Log On. If your version of Sametime supports audio/video, the My Available Tools dialog box appears so that you can define your audio/video tools. You might also be prompted to test your audio and video equipment.

Tip If you use Sametime Connect for the desktop, you can also log on to AOL Instant Messenger from the Sametime Connect window.

Logging Off from Sametime Connect

Once you log off from Sametime Connect, you appear Offline in other people’s contact lists. You cannot receive instant messages, instant meeting invitations, or any alerts that you have set, and you cannot view your contact list.

You can log off from Sametime Connect in either of the following ways:

- Choose People - “Log Off from Sametime.” This option does not automatically shut down Sametime Connect. You must manually exit Sametime Connect to shut down the program.
- Click the close button in the upper right corner of the Sametime Connect window. This option automatically shuts down Sametime Connect.

Note Logging off from Sametime Connect does not log you off from AOL Instant Messenger.

Logging on to Sametime Connect as a Different User

If you share a computer with other people, you might need to log off from Sametime Connect, and then log on with a different user name and password.
Follow these steps to log on to Sametime Connect as a different user:

1. Choose People - “Log Off from Sametime.”
2. Choose People - “Log On to Sametime.”
3. Enter your user name and password.
4. Click Log On.

Tip If you share a computer with other people, make sure that people who use the computer do not automatically log on to Sametime Connect.

Logging on to a Different Sametime Server

Follow these steps if you want Sametime Connect to use a different server:

1. Choose Options - Preferences
2. Select the Sametime Connectivity tab.
3. Enter the new server name in the Host field. If the field is disabled, contact your system administrator.
4. Click OK.
5. If you use Sametime Connect for the desktop, Choose People - “Log Off from Sametime,” and then choose People - “Log On to Sametime” to log on to the newly defined server. (If you use Sametime Connect for browsers, you do not need to log off; the new setting takes effect immediately.)

Note If you change connectivity settings with Sametime Connect for browsers, the new settings are valid only until you close Sametime Connect. If you log off from Sametime Connect, and then log on again without closing the Sametime Connect window, your changes remain in effect. If you close the Sametime Connect window, the default settings are used the next time you log on. If you change connectivity settings in Sametime Connect for the desktop, the new settings are valid for all future Sametime Connect sessions.

Reconnecting Manually to Sametime Connect

If you are disconnected from the server, Sametime Connect automatically restores your connection in most cases. You can also manually restore the connection in either of two ways:

- Choose People - “Reconnect to Sametime.”
- ![Disconnected](iconDisconnected.png)

If you use Sametime Connect for the desktop, click the Disconnected button near the bottom of the Sametime Connect window. (Do not click the down arrow.)
Using Sametime Connectivity Preferences

There are several technologies (or protocols) that allow Sametime Connect and the server to communicate. The term “connectivity” refers to this communication between Sametime Connect and your server. In most cases, Sametime automatically configures your connectivity preferences; you do not need to set them.

Your connectivity preferences determine:

- The server that Sametime Connect uses
- The protocol Sametime Connect uses to communicate with the server
- The ports used for Sametime Connect and Sametime meetings
- If Sametime Connect sends a “keep-alive” signal to monitor your connection to the server

If you need to change your Sametime connectivity preferences, you should first obtain the following information from your system administrator:

- **The host name of your server.** The host name is similar to a Web address (for example, sametime.yourcompany.com).
- **The server community port number.**
- **Whether the server is outside a firewall.** If the server is outside a firewall, ask your administrator to make sure that you can connect to services on port 1533 and that port 1533 is open for outgoing TCP/IP.
- **Whether your company uses a proxy server to connect to the Internet.** If your company uses a proxy server, obtain the following information:
  - The proxy type (the protocol that the proxy server uses): SOCKS4, SOCKS5, HTTPS, or HTTP
  - The host name and port number for the proxy server
  - If you are using SOCKS5 or HTTPS proxy servers, you need to obtain a user name and password. You should also find out if your proxy server can resolve server names locally.

**Note** If you change connectivity settings with Sametime Connect for browsers, the new settings are valid only until you close Sametime Connect. If you log off from Sametime Connect, and then log on again without closing the Sametime Connect window, your changes remain in effect. If you close the Sametime Connect window, the default settings are used the next time you log on. If you change connectivity settings in Sametime Connect for the desktop, the new settings are valid for all future Sametime Connect sessions.
Setting Sametime Connectivity Preferences

In most cases, Sametime automatically configures your connectivity preferences; you do not need to set them. If you need to change your connectivity preferences, you should first obtain the necessary information from your system administrator.

**Note** If you change connectivity settings with Sametime Connect for browsers, the new settings are valid only until you close Sametime Connect. If you log off from Sametime Connect, and then log on again without closing the Sametime Connect window, your changes remain in effect. If you close the Sametime Connect window, the default settings are used the next time you log on. If you change connectivity settings in Sametime Connect for the desktop, the new settings are valid for all future Sametime Connect sessions.

Follow these steps to set your connectivity preferences:

1. Choose Options - Preferences.
2. Select the Sametime Connectivity tab.
3. Enter the host name of the server in the Host field. If the field is disabled, contact your system administrator.
4. Enter the community port number. The default community port number is 1533.
5. Select “Send keep alive signal...” to send a keep alive message to the server. This message checks the connectivity between Sametime Connect and the server and allows you to get timely notification if you are disconnected from the server. Specify how often you want to send the signal. The default interval is 60 seconds.
6. In the Connection section, select the connection type:
   - **Sametime Connect for the desktop:**
     - Use my Microsoft Internet Explorer HTTP settings
     - Direct connection using HTTP protocol
     - Direct connection using HTTP protocol
     - Use proxy
   - **Sametime Connect for browsers:**
     - Use my Internet Explorer browser settings
     - Direct connection using Sametime protocol
     - Direct connection using HTTP protocol
     - Use proxy
7. If you selected “Use proxy” in step 6, skip to step 8. If you selected any of the other connection types, skip to step 12.
8. Select a proxy type:
   - SOCKS4
   - SOCKS5
   - HTTPS
   - HTTP
9. In the Proxy Server section, enter the host name and port number for your proxy server. The default community server port number for HTTP proxies is 8082.
10. If you selected SOCKS4 or SOCKS5 in step 8, “Resolve server name locally” is selected by default. If your proxy server cannot resolve names, clear the “Resolve server name locally” check box. Contact your system administrator for more information.
11. If you selected a SOCKS5, HTTPS, or HTTP proxy server in step 8, enter a user name and password in the Authentication section.
12. Click OK.

Creating and Maintaining the Contact List

Before you can send instant messages or start instant meetings, you must create a contact list. Your contact list contains people with whom you want to communicate on a regular basis.

See the topics below for more information about creating and maintaining your contact list:

- “Adding a Group to the Contact List”
- “Adding an Individual Name to the Contact List”
- “Adding a Participant Name to the Contact List”
- “Searching for Names in the Directory”
- “Removing an Individual Name or Group from the Contact List”
- “Viewing the Contents of a Public Group”
- “Renaming a Personal Group”
- “Rearranging Names in the Contact List”
- “Sorting the Contact List”
- “Choosing How to Display Names”
- “Saving and Loading a Contact List”
Adding a Group to the Contact List

You can add groups of people to your contact list at any time. Sametime Connect uses two kinds of groups:

- **Public groups:** Your system administrator uses your company's Directory to control the contents of public groups. The Directory is a master list of all people associated with your company. AOL Instant Messenger users and external users do not appear in public groups.

- **Personal groups:** You control the contents of personal groups. Personal groups can contain AOL Instant Messenger users, external users, and names from your company's Directory. When you add a personal group to your contact list, the group remains empty until you add individual names to it.

Adding a Public Group

Follow these steps to add a public group to your contact list:

1. Open the “Add Person or Group” dialog box in one of four ways:
   - Click the Add icon.
   - Choose People - Add.
   - In the contact list, select a public group, right-click, and choose Add from the shortcut menu.
   - In Sametime Connect for the desktop, press Insert while the contact list is displayed in the Sametime Connect window.

2. Select the Public Group tab.

3. Enter the name of the group exactly as it appears in the Directory, or click Directory to browse the available Directories. (For more information, see “Searching for Names in the Directory”.)

4. Click Add.

5. If the name you entered matches more than one group in the Directory, a list of the matching group names appears. Select the correct group name from the list. Click Add.

6. Click Close to close the “Add Person or Group” dialog box.

**Note** Public groups appear in your contact list only when at least one group member is online. If all group members are offline, the group does not appear in your contact list. Members of a public group appear in your contact list only when they are online, even if your contact list is set to display all people.
Adding a Personal Group

Follow these steps to add a personal group to your contact list:

2. Enter a name for the group.
3. Click OK.

Tip You can also add a personal group whenever you add an individual name to your contact list.

Adding an Individual Name to the Contact List

When you add an individual name to your contact list, you must add the name to a new or existing personal group. For example, if you add a coworker named Devon to your contact list because you are working on a marketing project together, you might create a new personal group called Marketing and add Devon to this group.

Note You cannot add individual names to public groups. Your system administrator controls the contents of public groups.

To add an individual name to your contact list:

1. Open the “Add Person or Group” dialog box in one of four ways:
   - Click the Add button.
   - Choose People - Add.
   - In the contact list, select a public or personal group, right-click and choose Add from the shortcut menu.
   - In Sametime Connect for the desktop, press Insert while the contact list is displayed in the Sametime Connect window.

2. Make sure the Users tab is selected, and choose a user community from the drop-down menu. If only one community is available, you do not see the drop-down menu. The possible user communities are:
   - Sametime: This community contains regular users at your company. In the “User name” field, enter a name exactly as it appears in your company’s Directory, or click Directory to search the Directory. For more information, see “Searching for Names in the Directory.”
   - External: This community contains people connected to your company’s extranet. Enter the person’s full e-mail address. For example, person@place.org.
• **AOL Instant Messenger**: This community contains AOL Instant Messenger users. This option is available only if you use Sametime Connect for the desktop. Enter the user’s complete AOL Instant Messenger screen name in the “Screen name” field, or click Find By Email and enter the person’s AOL e-mail address.

3. (Optional) Enter a nickname for the person. This nickname appears throughout Sametime Connect instead of the person’s full name, short name, or screen name. The nickname appears only on your computer; other people cannot see the nickname. If you searched the Directory for a name, you must first add the name to your contact list, and then create the nickname.

4. Select an existing personal group name, or create a new group by entering a new group name.

5. Click Add.

6. If the person’s name matches more than one entry in the Directory, a list of matching names appears. Select the correct name from the list and click Add.

7. Click Close.

---

**Searching for Names in the Directory**

The Directory is a master list of all people associated with your company. Your system administrator maintains your company’s Directory.

You can search your company’s Directory to locate the names of users and public groups. Your company’s Directory does not contain AOL Instant Messenger users, external users, or personal groups. Searching the Directory allows you to locate people or groups even when you do not know the exact spelling of their names.

You can access the Directory when you:

- Add names to your contact list.
- Add names to the Who Can See If I Am Online list.
- Invite other people to a meeting.
- Add names to a meeting invitation.

Follow these steps to search the Directory:

1. Click Directory.

2. Choose a Directory from the drop-down list. When the contents of the selected Directory appear, you can browse the Directory contents or search for a specific name:
• **Browse the Directory:** Use the Next Page and Previous Page buttons to page through the Directory list.

• **Search the Directory:** Enter a group name or a person’s name in the Search field and click Search.

**Tip** To see the members of a particular group, select the group and click Contents.

3. Select the names and/or groups that you want to add to your list or invitation. Hold CTRL to select multiple names; hold SHIFT to select multiple names that are adjacent to one another in the list.

**Note** If you are adding names to the Who Can See If I Am Online list, you must add individual names. You cannot add groups to this list.

4. Do one of the following:
   - If you are adding names to the Who Can See If I Am Online list, adding names to a meeting invitation, or inviting other people to a meeting, skip to step 5.
   - If you are adding individual names to your contact list, you must add them to a personal group. Select an existing personal group from the drop-down list, or enter a name for a new personal group.
   - If you are adding multiple names to your contact list, you must add all the names to the same personal group. Select an existing personal group from the drop-down list, or enter a name for a new personal group.

5. Click Add.

6. If any of the names or groups that you selected matches more than one entry in the Directory, a list of matching names appears. Select the correct name from the list and click Add.

7. Click Close.

**Tip** If you added a public group to your contact list but do not see the group in your contact list, your contact list is probably configured to display only online people. If none of the group members is currently online, the group does not appear in your contact list. See “Displaying Online People or All People” for more information.

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**Removing an Individual or Group from the Contact List**

You can remove people and groups from your contact list at any time.

You can remove:
• Public groups
• Personal groups
• Individual names within personal groups
You cannot remove:
• Individual names within public groups

Follow these steps to remove an individual or group from your contact list:

1. Select the name of the individual or group.
2. Do one of three things:
   • Choose People - Remove.
   • Right-click and choose Remove from the shortcut menu.
   • Press Delete.
3. Click Yes when the confirmation dialog box appears.

**Note** Before removing a name from your contact list, you should first remove any specific alerts associated with that name. If you continue to receive specific alerts for names that you have removed from your contact list, select “Stop alerting me about this person” when the alert message appears on your screen. If the alert is a sound that does not include a message box, you must add the person’s name to your contact list, remove the alert associated with that person, and then remove the person from your contact list again.

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**Viewing the Contents of a Public Group**

Viewing the contents of a public group allows you to see all members of the group, even people who are Offline. This feature is useful because the members of a public group appear in your contact list only when they are online, even if your contact list is set to display all people. Follow these steps to view all members of a public group:

1. Select a public group in the contact list.
2. Choose People - Group Contents, or right-click and choose Group Contents from the shortcut menu.
3. Click OK to close the Group Contents dialog box.

**Tip** You can also view the contents of a public group when you search for names in the Directory.
Renaming a Personal Group

You can rename personal groups in your contact list at any time by following these steps:

1. Select a personal group in the contact list.
2. Choose People - Rename Personal Group, or right-click and choose Rename from the shortcut menu.
3. Type the new name
4. Click OK.

Rearranging Names in the Contact List

If you use Sametime Connect for the desktop, you can rearrange the contact list by using the mouse to drag and drop names.

Tip If you use Sametime Connect for the desktop, you can also drag and drop names into meeting invitations.

You can:

- Move a person from one personal group to another.
- Copy a person from a public group to a personal group.
- Change the order of the people within a personal group.
- Change the order of groups in the contact list.

You cannot:

- Add or remove people from public groups.
- Change the order of people within a public group.
- If you have alphabetically sorted your contact list, your ability to rearrange names in the contact list is limited. For example, you can move or copy a name from one personal group to another, but you cannot change the order of the names or groups.

Note Sametime Connect for browsers does not support the drag-and-drop feature.

Sorting the Contact List

By default, the contact list displays groups in the order that you added them. You can also display groups in alphabetical order.

To sort groups in alphabetical order:
• **Sametime Connect for the desktop:** Choose Options - Sort List. A check mark appears next to the menu option. You cannot rearrange the contact list while the Options - Sort List option is checked.

• **Sametime Connect for browsers:** Choose Options - Sort List. The menu option changes to Show Original Order.

To display groups in the default order:

• **Sametime Connect for the desktop:** Remove the check mark next to the Sort List option by choosing Options - Sort List.

• **Sametime Connect for browsers:** Choose Options - Show Original Order. The Show Original Order menu option changes to Sort List.

**Note** If you sort groups in alphabetical order, your ability to rearrange names in the contact list is limited. For example, you can move or copy a name from one personal group to another, but you cannot rearrange the order of the names or groups.

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### Choosing How to Display Names in Sametime Connect

See the topics below for information about changing the appearance of names in Sametime Connect:

- “Displaying Full Names or Short Names”
- “Using Nicknames”
- “Displaying Online People or All People”

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### Displaying Full Names or Short Names

You can view full names (names with their server addresses) or short names (names without their server addresses). By default, Sametime Connect displays full names.

**Note** This setting affects the names of regular users only. The names of AOL Instant Messenger users, external users, and nicknames are not affected by this setting.

To display short names:

• **Sametime Connect for the desktop:** Choose Options - Show Short Names to place a check mark next to the menu option.

• **Sametime Connect for browsers:** Choose Options - Show Short Names. The menu option automatically changes to Options - Show Full Names.

To display full names:
• **Sametime Connect for the desktop:** Choose Options - Show Short Names to remove the check mark next to the menu option.

• **Sametime Connect for browsers:** Choose Options - Show Full Names. The menu option automatically changes to Options - Show Short Names.

**Tip** If two people in your company have the same first and last names, they might have identical short names. You can easily identify each person by creating unique nicknames or by displaying full names.

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**Using Nicknames**

You can give nicknames to people who appear in personal groups in your contact list. These nicknames appear only on your computer; other people cannot see the nicknames.

Nicknames replace full names and short names throughout Sametime Connect. For example, if the name Gabriella Santiago appears in your contact list, you might decide to use Gabi as a nickname. Once you create the nickname, Gabriella’s name appears as “Gabi” in all of your personal groups, public groups, chats, and instant meeting invitations.

**Creating or Editing a Nickname**

Follow these steps to create or edit a nickname:

1. Select a name from a personal group in the contact list. If the name does not appear in any of your personal groups, you must first add the name to a personal group.
2. Choose People - Edit Nickname, or right-click and choose Edit Nickname from the shortcut menu.
3. Type the nickname in the Edit Nickname dialog box. Nicknames can be any combination of alphanumeric characters.
4. Click OK.

**Tip** You can also assign nicknames whenever you add individual names to the contact list.

**Removing a Nickname**

When you remove a nickname, the person’s full name or short name appears instead of the nickname. Follow these steps to remove a nickname:

1. Select the name from a personal group in the contact list.
2. Choose People - Edit Nickname, or right-click and choose Edit Nickname from the shortcut menu.
3. Delete the nickname from the Edit Nickname dialog box.
4. Click OK.

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Displaying Online People or All People

By default, the contact list displays all people in your personal groups, including Offline people with whom you cannot communicate. If you prefer, you can display only people who are online. If you display online people, groups will appear in your contact list only when at least one group member is online. If all group members are Offline, the group does not appear in your contact list.

Note  This feature does not work with public groups. Members of a public group appear in your contact list only when they are online, even if your contact list is set to display all people.

To display online people:

- **Sametime Connect for the desktop**: Choose Options - Show Online People Only. A check mark appears next to the menu option.
- **Sametime Connect for browsers**: Choose Options - Show Online People Only. The Show Online People Only menu option changes to Show All People.

To display all people:

- **Sametime Connect for the desktop**: Remove the check mark by choosing Options - Show Online People Only.
- **Sametime Connect for browsers**: Choose Options - Show All People. The Show All People menu option changes to Show Online People Only.

Saving and Loading a Contact List

Sametime Connect allows you to create multiple contact lists, save them to your computer, and load them at any time. You can also transfer your contact list to a different computer. You can even transfer your contact list to other people so that they can use your contact list when they log on to Sametime Connect.

**Saving a Contact List**

Follow these steps to save a contact list:

1. Choose People - Save List.
2. Select a location where you want to save the contact list.
   - In Sametime Connect for the desktop, the default location is the C:\Program Files\Lotus\Sametime Client directory.
In Sametime Connect for browsers, the default location is C:\WINDOWS\JAVA for Microsoft Internet Explorer or C:\Program Files\Netscape\Users\netscape_profile for Netscape Communicator.

3. Enter a file name for the contact list in the Save As dialog box.
4. Click Save. The file is saved with the a DAT extension. Do not change this extension.

**Loading or Adding to a Contact List**

While working in Sametime Connect, you can load a different contact list at any time. In most cases, loading a new contact list replaces your current contact list without saving it. Therefore, you should always save your current contact list before loading a new contact list. You can also merge one contact list with another.

Follow these steps to load or merge a contact list:

1. Choose People - Add to/Replace List.
2. The Load File dialog box appears. Load a new contact list or add the names in the file you selected to your current contact list:
   - To load a new contact list, click Replace.
   - To add the new contact list to your current contact list, click Add. The two contact lists are merged into one contact list.
3. In the Open dialog box, select the contact list file and click Open.
4. If you chose to replace the current contact list in step 2, click Yes if prompted to replace the current contact list.

**Managing Your Online Status**

Your online status tells other people if you are available for online chats and instant meetings. Each online status is indicated by a unique icon and a customizable online status message.

If your online status is Active, Away, or Do Not Disturb, your name appears in green text in the contact list to indicate that you are logged on to Sametime Connect. When you are Offline, your name appears in black text to indicate that you are not logged on.
The table below describes the types of online status:

<table>
<thead>
<tr>
<th>Online Status</th>
<th>Icon</th>
<th>Definition</th>
<th>Default Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offline</td>
<td>No icon</td>
<td>Logged off and unavailable</td>
<td>(Person’s nickname/name) is now offline.</td>
</tr>
<tr>
<td>Active</td>
<td>![Active Icon]</td>
<td>Logged on and available</td>
<td>I am active.</td>
</tr>
<tr>
<td>Away</td>
<td>![Away Icon]</td>
<td>Logged on but away from the computer. A person with this status can receive messages. Any messages will remain on the screen until the person returns to the computer.</td>
<td>(Person’s name/nickname) is away or not using the computer now.</td>
</tr>
<tr>
<td>Do Not Disturb</td>
<td>![Do Not Disturb Icon]</td>
<td>Logged on but unavailable. You cannot send messages to people with this status.</td>
<td>Do not disturb me.</td>
</tr>
</tbody>
</table>

See the topics below for more information:

- “Changing Your Online Status”
- “Automatically Changing Your Online Status”
- “Customizing Your Online Status Messages”
- “Editing Your Current Online Status Message”
- “Determining Who Sees You Online”

### Changing Your Online Status

Your online status tells other people if you are available for online chats and instant meetings. Each online status is indicated by a unique icon and a customizable online status message. You can change your online status at any time.

Follow these steps to change your online status:

1. Choose an online status in any of the following three ways:
   - Choose an online status from the Options menu.
   - Choose an online status from the drop-down menu at the bottom of the Sametime Connect window.
   - ![Icon] In Sametime Connect for the desktop, right-click the Sametime Connect tray icon at the bottom of your screen and choose an online status from the shortcut menu.
2. If you have chosen to edit your online status message every time your online status changes, the Edit Message window appears. You can:
   - Click OK to leave the default message.
   - Enter a new message or select a different message from the drop-down list, and click OK.
   - Clear the “Edit message every time...” check box.

**Note** Sametime Connect for the desktop can automatically change your online status to Active or Away based on your computer mouse and keyboard usage.

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**Automatically Changing Your Online Status**

If you use Sametime Connect for the desktop, you can enable Sametime Connect to automatically change your online status based on your use of the mouse and keyboard. This feature is helpful if you sometimes forget to change your online status to Away when you leave your computer or to Active when you return to your computer.

Follow these steps to enable Sametime Connect to automatically change your online status:

1. Choose Options - Preferences.
2. Select the Status tab.
3. Select or clear the “From Active to Away...” check box.
   - Selecting this check box enables Sametime Connect to automatically change your online status from Active to Away if you do not use the mouse or keyboard for the specified number of minutes. This option does not change your online status if you have Offline, Do Not Disturb, or Away status.
   - Clearing this check box means that you must manually change your online status.
4. If you selected the check box in step 3, specify a number of minutes. The default is 20 minutes.
5. Select or clear the “From Away to Active...” check box.
   - Selecting this check box enables Sametime Connect to automatically change your online status from Away to Active whenever you use your mouse or keyboard. Using the mouse or keyboard does not affect your online status if you have a status of Offline, Do Not Disturb, or Active.
   - Clearing this check box means that you must manually change your online status.
Customizing Your Online Status Messages

You can customize the online status messages that appear when people point to your name in the contact list.

You can also change the message for your current online status by choosing Options - Edit Current Status Message.

Follow these steps to create a new online status message:

1. Choose Options - Preferences.
2. Select the Status tab.
3. Edit the default status messages by selecting messages from the drop-down menus or by entering a new message. You can store up to five different messages for each online status.
4. (Optional) Select or clear the “Edit message every time...” check boxes. If you select these check boxes, you will be prompted to select or create a new online status message every time your online status changes.
5. Click OK.

Editing Your Current Online Status Message

In addition to creating customized online status messages that apply any time you use Sametime Connect, you can also create a temporary online status message. This message appears as long as your online status remains unchanged. Once your online status changes, your default or customized online status message replaces this temporary message.

Follow these steps to temporarily change the message for your current online status:

1. Open the Edit Message dialog box in one of the following three ways:
   - Choose Options - Edit Current Status Message.
   - Choose Edit Current Status Message from the drop-down menu at the bottom of the Sametime Connect window.
   - In Sametime Connect for the desktop, right-click the Sametime Connect tray icon at the bottom of your screen, and choose Edit Current Status Message from the shortcut menu.
2. Enter a message or choose a message from the drop-down list.
3. (Optional) If you want to select a different online status message every time your online status changes, select “Edit message every time.” Remove the check mark if you do not want to use this feature.
4. Click OK.
Determining Who Sees You Online

Sametime Connect includes a privacy feature that allows you to determine which regular users can see you online. If you prevent someone from seeing you online:

- Your name always has Offline status in the selected person’s contact list. The person cannot send you instant messages or instant meeting invitations.
- The person’s name always has Offline status in your contact list. You cannot send instant messages or instant meeting invitations to the person.

**Note** This privacy feature does not work with AOL Instant Messenger users. You can use AOL Instant Messenger’s privacy features to determine which AOL Instant Messenger users can see you online.

Determining Who Can See You Online

Follow these steps to determine who can see if you are online:

1. Choose Options - Who Can See If I Am Online.
2. In the Who Can See If I Am Online dialog box, select one of the options:
   - **Everybody can see if I am online:** Anyone who adds you to their contact list can see you online.
   - **ONLY list below:** Only those people in the list you define can see you online.
   - **Everybody EXCEPT list below:** Everybody but those people in the list can see if you are online.
3. If you selected the “ONLY list below” or “Everybody EXCEPT list below” option, you must create a list by adding people:
   a. In the Who Can See If I Am Online dialog box, click Add.
   b. In the “Add to Privacy List” dialog box, add a regular user to the list by entering the person’s name exactly as it appears in the Directory or clicking Directory to search the Directory for the person’s name. To add an external user to the list, enter the person’s full e-mail address (for example, person@place.org).
   c. Click Add.
   d. Click Close.
4. Click OK.
Removing People from the "Who Can See If I Am Online" List

Follow these steps to remove people from the Who Can See If I Am Online list:

1. Choose Options - Who Can See If I Am Online.
2. Select a name from the list and click Remove.
3. Repeat step 2 until the appropriate names have been removed.
4. Click OK.

Note: If you remove all names from the list, you must select “Everybody can see if I am online” before clicking OK.

Sending Instant Messages

You can send two types of instant messages with Sametime Connect:

- Chats: Interactive conversations. Use chat if you need to ask a question or start a discussion.
- Announcements: One-way communications that usually do not require a response. Use an announcement if you need to quickly communicate information to people without generating a discussion. For example, you might want to send an announcement to remind people that a meeting will start in 5 minutes.

Chatting with People

Chats are interactive, real-time text conversations. Use chat if you need to ask a question or start a discussion.

You can send chat messages to anyone who has an Active or Away online status. People who are Away can see your messages once they return to their computers.

Note: Chats with regular users are automatically secured with encryption if all participants use Sametime 1.5 or higher. If any participant uses an earlier version of Sametime (version 1.0 or earlier), the chat is not encrypted. Chats with AOL Instant Messenger users and external users are not encrypted.

Sending a Chat Message

Follow these steps to start a chat with a single person. If you are sending a chat message to multiple people, see “Starting an Instant Meeting from Sametime Connect” for instructions.
Tip To send a chat message to someone in the Participant List of an active meeting, double-click a name, enter your message, and press Enter. You can also select a name, choose Meeting - People - New Chat, enter your message, and press Enter.

1. Do one of the following:
   • Double-click a name.
   • ✉️ Select a name and click the “Instant chat meeting” icon.
   • Right-click a name and choose Chat from the shortcut menu.
   • Select a name and choose Meeting - Chat.

2. In the Send Message dialog box, type your message and click Send or press Enter.

Tip Press SHIFT+ENTER to start a new line in a chat message.

3. (Optional) While chatting, you can do any of the following:
   • Use the Edit menu to edit your messages before sending them.
   • Choose Meeting - Add Tools and choose tools to add to the chat. See "Tools: How to Get Your Work Done" for more information about the available tools.
   • Invite others to join the chat.
   • Add a name to your contact list. If you are chatting with one other person, choose Meeting - “Add to List.” If you are chatting with more than one other person, choose Meeting - People - “Add to List.” Select or enter a personal group name in the Add New User dialog box and click OK.

4. You can leave the chat at any time in any of the following ways:
   • Click Close if you are in a chat with one person. Click Leave if you are in a chat with multiple people.
   • Choose Meeting - Close in a chat with one person. In a chat with multiple people, choose Meeting - Leave.
   • Click the close button in the upper right corner of the chat window.

Tip If you use Sametime Connect for the desktop, you can save a transcript, or text log, of the chat conversation to your computer. For more information, see the following:
   • “Saving a Chat Transcript”
   • “Determining Which Version of Sametime Connect You Are Using”
Chatting with AOL Instant Messenger Users

The following information applies to chats with AOL Instant Messenger users:

- Chat messages are not encrypted.
- You cannot include multiple AOL Instant Messenger users in a single chat meeting.
- You cannot include AOL Instant Messenger users in chats with regular users or external users.
- You cannot invite other people to a chat that is in progress.
- You cannot add tools to a chat.
- You cannot send announcements.
- You cannot use Sametime to transfer files to AOL Instant Messenger users.
- You cannot include AOL Instant Messenger users in the Who Can See Me Online list. You must use AOL Instant Messenger’s privacy features to control which AOL Instant Messenger users can contact you.
- If you exceed the AOL Instant Messenger rate limit, an appropriate message appears. Do not proceed with the chat until you receive a message notifying you that AOL Instant Messenger has returned to normal. You can exceed the AOL Instant Messenger rate limit by sending several messages one after another.
- If you receive an instant message from an AOL Instant Messenger user, you can click the AOL Instant Messenger icon at the bottom of the chat window to access the AOL Instant Messenger home page.

Chatting with External Users

The following information applies to chats with external users:

- Chat messages are not encrypted.
- You cannot include multiple external users in a single instant chat meeting.
- You cannot include external users in chats with AOL Instant Messenger users or regular users.
- You cannot invite other people to a chat that is in progress.
- You cannot add tools to a chat.
- You cannot send announcements.
- You cannot use Sametime to transfer files to external users.
Sending Announcements

Announcements are one-way, real-time communications that do not usually require a response. Use an announcement if you need to quickly communicate information to people without generating a discussion.

You can send announcements to regular users who have an Active or Away online status. (People who are Away can see the announcement whenever they return to their computers.) You cannot send announcements to AOL Instant Messenger users, external users, or people with a status of Do Not Disturb or Offline.

**Note** Announcements are not secured with encryption.

Follow these steps to send an announcement:

1. Select the names of the people to receive the announcement. You must select green names (people who are currently online).
2. Open the Announcement dialog box in one of three ways:
   - Click the announcement icon.
   - Choose Meeting - “Send an Announcement.”
   - Right-click a selected name and choose “Send an Announcement” from the shortcut menu.
3. Enter your message.
4. If you want to allow recipients to reply directly to the announcement, select “Allow people to respond to me.”
5. Click Send.

**Note** There are several cases, when broadcast announcements do not reach all intended recipients. For example, old clients, external users, mobile users and others will not get the announcement.

Customizing Your Instant Meeting Invitations

Sametime Connect allows you to customize the default messages that appear when you send invitations to instant meetings. You can also edit these message any time you send an instant meeting invitation.

Follow these steps to customize the default messages for your instant meeting invitations:

1. Choose Options - Preferences.
2. Select the General tab.
3. In the “Default text for invite to chat” field, enter the text you want to appear when you send a chat message to multiple people.

4. In the “Default text for invite to a meeting” field, enter the text you want to appear when you invite people to an instant meeting that includes other interactive tools in addition to chat.

5. Click OK.

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**Using Alerts**

Sametime Connect uses two kinds of alerts:

- **General Alerts** notify you when:
  - New instant messages or instant meeting invitations arrive.
  - You add a name or group to your contact list.
- **Specific Alerts** notify you when selected people in your contact list become Active.

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**Setting General Alerts**

Sametime Connect can notify you when new instant meeting invitations, chat messages, or announcements arrive. This feature is useful because you might not notice incoming instant messages if you have several active windows on your screen or if you are not looking at your computer.

Sametime Connect can also display messages that give you feedback when you add new names to your contact list. This feature can be useful if you want confirmation that you have correctly added a name or if you want to avoid adding duplicate names to your contact list.

Sametime Connect can notify you in three ways:

- Placing new messages in front of all other active windows on your computer screen
- Blinking (flashing) new message windows
- Playing a sound when new messages arrive

Follow these steps to set general alerts:

1. Choose Options - Preferences.
2. Select the Alerts tab.
3. Determine how you want to be alerted when a new invitation or message arrives:
Select or clear “Bring the message window to the front.” If you select this option, any text that you are typing in another program might appear in the new chat window when you receive instant messages. This text is not sent unless you click Send or press Enter.

Select or clear “Blink window.”

Select or clear “Play a sound.” If you use Sametime Connect for the desktop, you can use the default sound or click Browse to choose another sound file. The sound file you select must be in the WAV format.

4. Select “Display a message box” if you want to be alerted when you successfully add a person or a group to your contact list.

5. Click OK.

Setting Specific Alerts

Specific alerts play a sound or display a message whenever selected people in your contact list become Active. This feature can be useful if you want to know immediately when someone becomes Active. For example, you might need to ask someone an important question as soon as possible. Creating a specific alert eliminates the need to continually check that person's online status.

Note Before removing a name from your contact list, you should first remove any specific alerts associated with that name. If you continue to receive specific alerts for names that you have removed from your contact list, select “Stop alerting me about this person” when the alert message appears on your screen. If the alert is a sound that does not include a message box, you must add the person’s name to your contact list, remove the alert associated with that person, and then remove the person from your contact list again.

Creating Specific Alerts

Follow these steps to create specific alerts for selected people in your contact list:

1. Select a name in your contact list.
2. Choose People - Alert Me When.
3. In the “Alert Me When Selected Person Becomes Available” dialog box, select one or both of the following two options:
   - Comes online
   - Becomes Active after being in Away or Do Not Disturb status
4. Select a notification method. You can select multiple methods.
• **Displaying a message box:** This method displays a message box on your computer screen. If you would like to customize the message that appears, select “Display the following reminder message to me in the message box” and enter your message.

• **Playing a sound:** This method plays a sound on your computer's speakers or headphones. You can customize the sound by clicking Browse and selecting a sound file. If you use Sametime Connect for the desktop, you must use a sound file in the WAV format. If you use Sametime Connect for browsers, you must use a sound file in the AU format. If you select “Play the same sound when this person sends me invitations or instant messages” you can associate specific sounds with certain people in your contact list.

5. If you want to be alerted every time the selected person's status changes, select “Always alert me on this person.” If you do not select this check box, the alert appears only once.

6. Click OK.

### Removing and Editing Specific Alerts

You can remove alerts that you have associated with specific names in your contact list in one of the following three ways:

• If you have chosen to display a message for the alert, you can remove the alert by selecting “Stop alerting me about this person” in the message box that appears when the person’s status changes.

• To clear specific alerts for a single person, select a name in your contact list and Choose People - Alert Me When. The “Alert Me When Selected Person Becomes Available” dialog box appears. Clear the “Comes online” and “Becomes Active after being in Away or Do Not Disturb status” options, and click OK.

**Tip** To edit the specific alert, change the alert settings instead of clearing all the options in the dialog box.

• You can remove all specific alerts associated with the names in your contact list in two ways:
  
  • Choose People - Clear All Specific Alerts. Click Yes when the confirmation message appears.
  
  • Choose Options - Preferences, select the Alerts tab, and click Clear All Specific Alerts. Click Yes when the confirmation message appears.
Sametime Connect and AOL Instant Messenger

Sametime Connect for the desktop allows you to log on to AOL Instant Messenger directly from the Sametime Connect window. When you use this feature, you appear online to other AOL Instant Messengers as long as you keep Sametime Connect running on your computer. You must register with AOL Instant Messenger before using this feature.

Note Sametime Connect for browsers does not support AOL Instant Messenger.

See the topics below for more information about using AOL Instant Messenger with Sametime Connect:

- “Logging on to AOL Instant Messenger”.
- “Using AOL Instant Messenger Services”.
- “Setting AOL Instant Messenger Connectivity Preferences”
- “Sametime Connect Features That Do not Work with AOL Instant Messenger”

Logging on to AOL Instant Messenger

Sametime Connect for the desktop allows you to log on to AOL Instant Messenger directly from the Sametime Connect window. To save time, you can automatically log on to AOL Instant Messenger whenever you start Sametime Connect. You must register with AOL Instant Messenger before using these features.

Note Sametime Connect for browsers does not support AOL Instant Messenger.

Follow these steps to log on to AOL Instant Messenger from the Sametime Connect window:

1. Choose People - “Log On to AOL Instant Messenger.”
2. If you do not have a screen name and password for AOL Instant Messenger, click Register. A new browser window appears on your screen. Follow the instructions to register with AOL Instant Messenger and obtain a user name and password.
3. Enter your AOL Instant Messenger screen name.
4. Enter your AOL Instant Messenger password.
5. (Optional) If necessary, click Connectivity to change your AOL Instant Messenger connectivity preferences. You can edit your connectivity
preferences at any time. In most cases, you should be able to use the default settings.

**Tip** If you use AOL Instant Messenger often, you can select “Automatically log me on” to automatically log on to AOL Instant Messenger whenever you start Sametime Connect. You will not need to enter your AOL Instant Messenger screen name and password in the future. If this check box is disabled, contact your system administrator.

6. Click Log On.

- If you have logged on to both Sametime Connect and AOL Instant Messenger, your AOL Instant Messenger screen name does not automatically appear in your contact list. You must manually add your AOL screen name to your contact list.
- If you are logged on to AOL Instant Messenger but logged off from Sametime Connect, your AOL Instant Messenger screen name automatically appears in your contact list in the personal group called "Work."

**Logging Off from AOL Instant Messenger**

To log off from AOL Instant Messenger, choose People - “Log Off from AOL Instant Messenger.” Logging off from AOL Instant Messenger does not affect your online status in Sametime Connect.

**Logging on to a Different AOL Instant Messenger Server**

Follow these steps to log on to a different AOL Instant Messenger server:

1. Choose Options - Preferences.
2. Select the AOL Instant Messenger Connectivity tab.
3. Enter the new AOL Instant Messenger server host name in the Host field. If this field is disabled, contact your system administrator.
4. Click OK.
5. Choose People - “Log Off from AOL Instant Messenger.”
6. Choose People - “Log On to AOL Instant Messenger” to log on to the newly defined AOL Instant Messenger server.

**Using AOL Instant Messenger Services from the Sametime Connect Window**

If you use Sametime Connect for the desktop, you can choose People - AOL Instant Messenger Services to quickly access many AOL Instant Messenger features.
**Note** Sametime Connect for browsers does not support AOL Instant Messenger.

**Registering with AOL Instant Messenger**

You must have an AOL Instant Messenger screen name and password to use the AOL Instant Messenger features of Sametime Connect.

To register with AOL Instant Messenger:

1. Open the AOL Instant Messenger registration page by doing one of the following:
   - Choose People - AOL Instant Messenger Services - Register.
   - Choose People - “Log On to AOL Instant Messenger.” When the “Log On to AOL Instant Messenger” dialog box appears, click Register.
2. A new browser window appears on your screen. Follow the instructions to register with AOL Instant Messenger and obtain a screen name and password.

**Finding an AOL Instant Messenger Buddy by E-mail**

If you know a person’s AOL e-mail address, you can find that person’s AOL Instant Messenger screen name and add it to your contact list.

Follow these steps to find an AOL Instant Messenger buddy by e-mail:

1. Open the “Find a Buddy by Email” dialog box by doing one of the following:
   - Choose People - AOL Instant Messenger Services - Find Buddy By Email.
   - Choose People - Add. Select the AOL Instant Messenger community and click “Find by Email.”
2. Enter an AOL e-mail address and click Search.
3. Select a buddy from the list of screen names.
4. (Optional) Enter a nickname for this buddy.
5. In the “Select a group or type a new group name” field, select an existing personal group or enter the name of a new personal group.
6. Click Add.

**Changing Your AOL Instant Messenger Password**

Follow these steps to change your AOL Instant Messenger password:

1. Choose People - AOL Instant Messenger Services - Change Password.
2. Enter your current password.
3. Enter your new password.
4. Enter your new password again.
5. Click OK.

**Finding a Lost AOL Instant Messenger Password**

Follow these steps to retrieve your AOL Instant Messenger password if you have lost it:

1. Choose People - AOL Instant Messenger Services - Find Lost Password.
2. A new browser window appears on your screen. Follow the instructions on the screen.

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**Setting Preferences for AOL Instant Messenger Connectivity**

If you use Sametime Connect for the desktop, you can use the Sametime Connect window to communicate with people who use AOL Instant Messenger. Before you can connect to an AOL Instant Messenger server, you must first configure your AOL Instant Messenger connectivity settings. The information you enter depends on your network configuration.

*Note* Sametime Connect for browsers does not support AOL Instant Messenger.

**Obtaining Information**

Before setting AOL Instant Messenger connectivity preferences, you should obtain the following information from your system administrator:

- **The host name of the AOL server.** The host name is similar to a Web address (for example, sample.server.aol.com).

- **Whether the AOL server is outside a firewall.** If your company uses a firewall, ask your system administrator to make sure that you are allowed to connect to services on port 5190 and that port 5190 is open for outgoing TCP/IP.

- **Whether you need to use a proxy server to connect to the Internet.** If you need a proxy server, obtain the following information from your system administrator:
  - The proxy type (the protocol that the proxy server uses): SOCKS4, SOCKS5, or HTTPS.
  - The host name and port number for the proxy server.
  - If you are using SOCKS5 or HTTPS, you need a user name and password.
**Tip** If you have installed AOL Instant Messenger on your computer, you might be able to obtain this information from your AOL Instant Messenger Connection Preferences.

**Setting AOL Instant Messenger Connectivity Preferences**

Follow these steps to set your AOL Instant Messenger connectivity preferences:

1. Choose Options - Preferences.
2. Select the AOL Instant Messenger Connectivity tab.
3. If necessary, enter the host name of the AOL Instant Messenger server in the Host field. In most cases you should be able to use the default host, which is login.oscar.aol.com. If this field is disabled, contact your system administrator.
4. Enter the port number in the Port field. The default port is 5190. If you enter an HTTPS proxy server in step 7, the default port changes to 443.
5. Select the proxy server type:
   - No proxy
   - HTTPS proxy
   - SOCKS4
   - SOCKS5
6. If you selected “No proxy” in step 5, skip to step 9. If you selected one of the proxy server types, continue to step 7.
7. Enter the host name and the port number for the proxy server:
   - For SOCKS4 and SOCKS5 proxy servers, the default port number is 1080.
   - For an HTTPS proxy server, the default port number is 80. If you use an HTTPS proxy server, the default AOL Instant Messenger port used in step 4 automatically changes to 443.
8. If you selected a SOCKS5 or HTTPS proxy server, enter your user name and password in the Authentication section of the dialog box.
9. Click OK.

**Sametime Connect Features that do not Work with AOL Instant Messenger**

Generally, communicating with AOL Instant Messenger users is just like communicating with other users. The list below explains the Sametime Connect features that do not work with AOL Instant Messenger users:
With AOL Instant Messenger, you have only two online statuses: online or offline. The four online statuses for Sametime Connect do not apply to AOL Instant Messenger. For example, if you log on to both Sametime Connect and AOL Instant Messenger through the Sametime Connect window, and then set your Sametime Connect online status to Do Not Disturb, you still appear online to other AOL Instant Messenger users. Sametime users cannot send messages to you while you have Do Not Disturb, but you might still receive messages from other AOL Instant Messenger users unless you log off from AOL Instant Messenger.

- You cannot invite AOL Instant Messenger users to instant meetings.
- Chat messages are not encrypted.
- You cannot include multiple AOL Instant Messenger users in a single chat meeting.
- You cannot include AOL Instant Messenger users in chats with regular users or external users.
- You cannot invite other people to a chat that is in progress.
- You cannot add tools to a chat.
- You cannot send announcements.
- You cannot use Sametime to transfer files to AOL Instant Messenger users.
- You cannot include AOL Instant Messenger users in the Who Can See Me Online list. You must use AOL Instant Messenger's privacy features to control which AOL Instant Messenger users can contact you.
- If you exceed the AOL Instant Messenger rate limit while chatting with an AOL user, an appropriate message appears. Do not proceed with the chat until you receive a message notifying you that the AOL Instant Messenger has returned to normal. You can exceed the AOL Instant Messenger rate limit by sending several messages one after another.

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**Defining Your Audio and Video Tools**

Sametime Connect lets you show other people the audio and video tools that you can use. For example, you can specify that you have a microphone but that you do not have a video camera. The settings you specify determine what other people see when they view your available audio and video tools. Other people use these settings to determine whether you will be able to participate in their meetings.

You might be prompted to define your audio and video tools the first time you log on to Sametime Connect.
To define your audio and video tools:

1. Choose Options - Preferences.
2. Select the Audio/Video tab.
3. Under My Available Tools, select the options that apply to your computer hardware:
   - I have a microphone.
   - I have speakers.
   - I have a video camera.
4. (Optional) If you selected any of the options in step 3, click “Test My Audio/Video Tools” to test your audio and video equipment. A simulated meeting starts, allowing you to test your audio and video tools to make sure they function properly.

Tip Click Troubleshooting for help with audio and video problems.

5. Select “Confirm my available tools every time I log on” if you want to define your audio and video equipment every time you log on to Sametime Connect. This feature is useful if you have a portable computer that cannot use all of your equipment in some locations.

Note The Meeting Room allows you to set audio/video preferences. The preferences for the Meeting Room help you ensure that your audio and video are functioning properly during meetings.

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Managing the Sametime Connect Window

You can control the appearance and behavior of the Sametime Connect window by:

- **Displaying the Sametime Connect window on top.** To display the Sametime Connect window on top of all other windows on your desktop, choose Options - “Always on Top.” A check mark appears next to the menu option. This feature is not available with Sametime Connect for browsers.

- **Showing or hiding the Sametime Connect status bar.** The Sametime Connect status bar indicates whether or not you are logged on to Sametime Connect and AOL Instant Messenger. It also displays messages related to your connection to the server.
  - To show the Sametime Connect status bar in Sametime Connect for the desktop, choose Options - Show Status Bar. A check mark appears next to the menu option.
• The status bar is always visible with Sametime Connect for browsers, but it does not contain icons that indicate when you are logged on to Sametime Connect or AOL Instant Messenger.

• **Showing or Hiding the Sametime Connect button in your taskbar.** A Sametime Connect button appears in the taskbar at the bottom of your screen whenever you use Sametime Connect. This button lets you quickly access Sametime Connect when the Sametime Connect window is minimized.

If you use Sametime Connect for the desktop, you can hide this button. You might want to hide the taskbar button if your screen already has a tray icon for Sametime Connect. The taskbar button is always visible with Sametime Connect for browsers.

To show or hide the taskbar button:

a. Choose Options - Preferences.

b. Select the General tab.

c. Clear or select the “Hide the Sametime Connect taskbar button” check box.

• **Minimizing the Sametime Connect window.** To minimize the Sametime Connect window, click the minimize button in the upper right corner of the Sametime Connect title bar. Minimizing the Sametime Connect window does not affect your online status. While the window is minimized, you continue to receive instant messages, instant meeting invitations, and any alerts that you have set.

• Restoring the Sametime Connect window. You can restore the minimized Sametime Connect window in any of the following ways:

• Click the Sametime Connect taskbar button at the bottom of your screen, or right-click the button and choose Restore.

• Double-click the Sametime Connect tray icon at the bottom of your screen, or right-click the tray icon and choose Open Sametime Connect

• Press CTRL+ALT+C. This option works only with Sametime Connect for the desktop.
Accessing Other Areas of Sametime

You can access the Meeting Center from the Sametime Connect window. If you must enter a user name and password to access the Meeting Center, you can use the same user name and password that you use to log on to Sametime Connect.

Use the following menu options to access the Meeting Center:

- To attend a meeting from the Meeting Center, choose Meeting - “Attend a Meeting.”
- To schedule a meeting in the Meeting Center, choose Meeting - “Schedule a Meeting.”
Chapter 3: Preparing to Use Audio and Video

If your version of Sametime includes computer audio and video, you can talk to your colleagues during an online meeting just as though you were seeing them face to face. Before you attend your first audio/video meeting, follow these tips to ensure that your meeting is successful:

• Make sure your computer includes the required hardware and software for audio/video meetings.
• Use Sametime to test your audio and video.
• Test and configure your sound card.

Useful Terms
The following terms will help you use your audio and video effectively:

General Terms
• Device driver: A device driver allows a hardware device (such as a camera) to interact with a program that uses the device.

Audio Terms
• Sound card: A hardware component that allows your computer to record or produce sounds.
• Full duplex: Describes a sound card that allows you to speak and listen at the same time. You must have a full-duplex sound card to participate in interactive meetings. (You can use a half-duplex sound card for broadcast meetings or when viewing a recorded meeting.)
• Half duplex: Describes a sound card that does not allow you to speak and listen at the same time. If you are using a half-duplex sound card and someone interrupts you while you are speaking, you will not hear the interruption. You can use a half-duplex sound card for broadcast meetings or when viewing a recorded meeting.
• Recording device: The device that your computer uses to record computer audio; usually a sound card for a microphone or speakerphone. If you have more than one sound card, you can choose your preferred recording device in the audio preferences for Sametime.
• **Playback device:** The device that your computer uses to play computer audio; usually a sound card for speakers or headphones. If you have more than one sound card, you can choose your preferred playback device in the audio preferences for Sametime.

• **System mixer:** Software on your computer that allows you to set volume levels for the audio components on your system (such as your microphone and speakers). You can access the system mixer from the audio preferences for Sametime.

• **Microphone sensitivity:** Your microphone's sensitivity to surrounding noise, such as shuffling papers or typing on the keyboard. You can adjust the microphone sensitivity to ensure that you do not transmit noise when another participant is speaking.

• **Echo cancellation:** A feature that eliminates any echo caused by audio coming out of your speakers and going back into your microphone. This type of echo can occur when your speakers and microphone are too close together (for example, if you are using a laptop with speakers and microphone set close together or if you move your microphone too close to your desktop speakers). To eliminate echoes in your meetings, you can use headphones or a speakerphone with echo cancellation, or you can select the echo cancellation check box in the audio preferences of Sametime.

• **Unidirectional microphone:** A microphone that picks up most of its sound from directly in front of the microphone. A unidirectional microphone is recommended for use with Sametime unless you are using a 360-degree video camera. (Use an omnidirectional microphone with a 360-degree video camera.)

• **Omnidirectional microphone:** A microphone that picks up sound from all sides. Use an omnidirectional microphone when you are using a 360-degree video camera.

**Video Terms**

• **Video card:** A hardware component that allows your computer to produce video images. Also known as a video capture device. You can choose your preferred video card (or video capture device) in the video preferences for Sametime.

• **Video capture device:** Either a video card (see definition above) or a Universal Serial Bus (USB) camera.

• **Video format:** The format that the camera uses to pass video images between the camera and the waiting program (such as Sametime). You can set your video format in the video preferences for Sametime.
• **Video size**: Defines how many pixels, or dots, make up each video image. Sametime supports two video sizes: 176 x 144 or 160 x 120. You can choose a video size in the video preferences.

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**Preparing to Use Audio and Video**

If your version of Sametime includes computer audio and video, you can talk to your colleagues during an online meeting just as though you were seeing them face to face. Before you attend your first audio/video meeting, follow these tips to ensure that your meeting is successful:

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• Use Sametime to test your audio and video.

• Test and configure your sound card.

**Useful Terms**

The following terms will help you use your audio and video effectively:

**General Terms**

• **Device driver**: A device driver allows a hardware device (such as a camera) to interact with a program that uses the device.

**Audio Terms**

• **Sound card**: A hardware component that allows your computer to record or produce sounds.

• **Full duplex**: Describes a sound card that allows you to speak and listen at the same time. You must have a full-duplex sound card to participate in interactive meetings. (You can use a half-duplex sound card for broadcast meetings or when viewing a recorded meeting.)

• **Half duplex**: Describes a sound card that does not allow you to speak and listen at the same time. If you are using a half-duplex sound card and someone interrupts you while you are speaking, you will not hear the interruption. You can use a half-duplex sound card for broadcast meetings or when viewing a recorded meeting.

• **Recording device**: The device that your computer uses to record computer audio; usually a sound card for a microphone or speakerphone. If you have more than one sound card, you can choose your preferred recording device in the audio preferences for Sametime.
• **Playback device:** The device that your computer uses to play computer audio; usually a sound card for speakers or headphones. If you have more than one sound card, you can choose your preferred playback device in the audio preferences for Sametime.

• **System mixer:** Software on your computer that allows you to set volume levels for the audio components on your system (such as your microphone and speakers). You can access the system mixer from the audio preferences for Sametime.

• **Microphone sensitivity:** Your microphone's sensitivity to surrounding noise, such as shuffling papers or typing on the keyboard. You can adjust the microphone sensitivity to ensure that you do not transmit noise when another participant is speaking.

• **Echo cancellation:** A feature that eliminates any echo caused by audio coming out of your speakers and going back into your microphone. This type of echo can occur when your speakers and microphone are too close together (for example, if you are using a laptop with speakers and microphone set close together or if you move your microphone too close to your desktop speakers). To eliminate echoes in your meetings, you can use headphones or a speakerphone with echo cancellation, or you can select the echo cancellation check box in the audio preferences of Sametime.

• **Unidirectional microphone:** A microphone that picks up most of its sound from directly in front of the microphone. A unidirectional microphone is recommended for use with Sametime unless you are using a 360-degree video camera. (Use an omnidirectional microphone with a 360-degree video camera.)

• **Omnidirectional microphone:** A microphone that picks up sound from all sides. Use an omnidirectional microphone when you are using a 360-degree video camera.

**Video Terms**

• **Video card:** A hardware component that allows your computer to produce video images. Also known as a video capture device. You can choose your preferred video card (or video capture device) in the video preferences for Sametime.

• **Video capture device:** Either a video card (see definition above) or a Universal Serial Bus (USB) camera.

• **Video format:** The format that the camera uses to pass video images between the camera and the waiting program (such as Sametime). You can set your video format in the video preferences for Sametime.
**Video size:** Defines how many pixels, or dots, make up each video image. Sametime supports two video sizes: 176 x 144 or 160 x 120. You can choose a video size in the video preferences.

---

**Supported Sound Cards**

The following lists identify sound cards that you can use with Sametime.

**Note** All product and company names mentioned herein may be the trademarks or registered trademarks of their respective owners.

Any correctly installed full-duplex sound card should work with Sametime. The sound cards listed below have been tested with Sametime:

- CrystalWare (integrated)
- Montego A3D Xstream
- SoundBlaster Live Value
- ALS120
- Aureal Vortex A3D SQ1500
- Aureal SB Audio PCI 64V
- ES1887 (integrated)
- Montego II A3D
- Montego II Quadzilla
- Rockwell WaveArtist
- SoundBlaster PCI 128
- SoundBlaster PCI 512
- SoundBlaster 32 AWE
- SIIG SoundWave Pro PCI
- Yamaha DS-XG (integrated)
- Creative Crystal PnP Es 1868
- Creative Sound Blaster Creative 16 Plug & Play
- Creative AWE64
- Creative SoundBlaster PCI
- Addonic (PCI)
- Crystal Audio (DELL onboard sound card)
- Crystal SoundFusion PCI Audio Accelerator (IBM Thinkpad® default)
Supported Cameras

The table below lists supported cameras for each operating system. The table includes all cameras that have been tested with Sametime to date. If your preferred camera is not listed, check with your system administrator to obtain the most recent information about supported cameras. Universal Serial Bus (USB) cameras are recommended for use with Sametime. The cameras listed below are all USB cameras.

Please note that this version of Sametime only supports Windows 2000 Professional and Windows XP operating systems.

**Note** All product and company names mentioned herein may be the trademarks or registered trademarks of their respective owners.

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Supported Cameras</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 95 OSR2</td>
<td>Intel PC Camera Pro Pack</td>
</tr>
<tr>
<td></td>
<td>Boser BS105B (requires capture card)</td>
</tr>
<tr>
<td></td>
<td>Logitech QuickCam Express</td>
</tr>
<tr>
<td></td>
<td>Orite USB PC Camera</td>
</tr>
<tr>
<td></td>
<td>Winnov Videum Board (PCI capture card only; does not include a camera)</td>
</tr>
<tr>
<td></td>
<td>GV-VCP2 (PCI capture card only; does not include a camera)</td>
</tr>
</tbody>
</table>

continued

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Supported Cameras</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 98</td>
<td>ATI All-In-Wonder Pro (PCI capture card only; does not include a camera)</td>
</tr>
<tr>
<td></td>
<td>IBM PC Camera</td>
</tr>
<tr>
<td></td>
<td>IBM PC Camera Pro Max</td>
</tr>
<tr>
<td></td>
<td>Creative Video Blaster WebCam 3</td>
</tr>
<tr>
<td></td>
<td>Intel PC Camera Pro Pack</td>
</tr>
<tr>
<td></td>
<td>Intel PC Camera Pack</td>
</tr>
<tr>
<td></td>
<td>Kodak DVC325</td>
</tr>
<tr>
<td></td>
<td>Logitech QuickCam Home</td>
</tr>
<tr>
<td></td>
<td>Logitech QuickCam Express</td>
</tr>
<tr>
<td></td>
<td>Logitech QuickCam WebCam</td>
</tr>
<tr>
<td></td>
<td>Logitech QuickCam VC Alpa Cam</td>
</tr>
<tr>
<td></td>
<td>Nogatech USB Digital Micro Cam</td>
</tr>
<tr>
<td></td>
<td>Creative Video Blaster WebCam Go</td>
</tr>
<tr>
<td></td>
<td>Webeye PC370</td>
</tr>
<tr>
<td></td>
<td>Boser BS105B (requires capture card)</td>
</tr>
<tr>
<td></td>
<td>I-O Data USB-CCD</td>
</tr>
<tr>
<td></td>
<td>GV-VCP2 (PCI capture card only; does not include a camera)</td>
</tr>
<tr>
<td></td>
<td>GNet DZ eye</td>
</tr>
<tr>
<td></td>
<td>Orite USB PC Camera</td>
</tr>
<tr>
<td></td>
<td>QuickCapture-EZ Video Capture card CA-120P</td>
</tr>
<tr>
<td></td>
<td>Orite Technology (requires capture card)</td>
</tr>
<tr>
<td></td>
<td>3Com HomeConnect</td>
</tr>
<tr>
<td>Operating System</td>
<td>Supported Cameras</td>
</tr>
<tr>
<td>------------------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>Windows NT 4, Service Pack 6</td>
<td>3Com Big Picture</td>
</tr>
<tr>
<td>Windows 2000 Professional</td>
<td>3Com HomeConnect</td>
</tr>
<tr>
<td></td>
<td>Hauppauge WinTV (PCI capture card only; does not include a camera)</td>
</tr>
<tr>
<td></td>
<td>Webeye PC370</td>
</tr>
<tr>
<td></td>
<td>Kodak DVC325</td>
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<tr>
<td></td>
<td>Logitech QuickCam VC Alpa Cam</td>
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</tr>
<tr>
<td></td>
<td>Logitech QuickCam Home</td>
</tr>
<tr>
<td></td>
<td>Orite USB PC Camera</td>
</tr>
<tr>
<td></td>
<td>IBM UltraPort™</td>
</tr>
<tr>
<td></td>
<td>IBM PC Camera</td>
</tr>
<tr>
<td></td>
<td>Nogatech USB Digital Micro Cam</td>
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<td>Windows XP</td>
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<td>Hauppauge WinTV (PCI capture card only; does not include a camera)</td>
</tr>
</tbody>
</table>

**Note** Sametime supports the TotalView High Res 360-degree video camera from BeHere Technologies. For more information about this camera, such as required hardware and software, see the camera documentation.

**Using Sametime to Test Your Audio and Video**

Sametime allows you to test your audio and video before joining a meeting. You can test your audio and video when you test a meeting from Sametime Connect or from the Meeting Center. (If you only plan to attend broadcast meetings, you do not need to test your audio and video.)

The first time that you test your audio and video, you might see some Security Warnings. Click Yes or OK in the warning dialog boxes to test your audio and video. See “Downloading the Sametime Meeting Room” for more information.

To test your audio and video:

1. Do one of the following:
   1. From Sametime Connect, choose Options - Test Meeting.
   1. From the Meeting Center, click Test Meeting.
2. The Test Meeting window appears, with text on the left and a Meeting Room, including video windows and audio controls, on the right. You should be able to see your own video image in both the My Video and Speaker's Video windows.

3. If you want to test other aspects of your meeting (for example, if you want to make sure you are using a recommended browser), follow the instructions in the help topic “Testing a Meeting.”

4. When you are ready to test your audio and video, click the “Test your audio/video” link in the Test Meeting window.

5. Audio and video help text appears on the left side of the Test Meeting window. Follow the instructions to test your microphone, speakers, and video camera.

6. When you have finished testing, click Done in the Test Meeting window. Your audio and video are now ready for Sametime.

**Testing and Configuring Your Sound Card**

To ensure that your sound card will perform well during meetings, you can:

- Ensure that you have a full-duplex sound card.
- Use the Sound Recorder to test the recording and playback capabilities of the sound card.

**Ensuring That You Have a Full-Duplex Sound Card**

To use audio and video in most meetings, you must have a full-duplex sound card. A full-duplex sound card allows you to record and play audio simultaneously. To verify that your sound card is full duplex, check your sound card documentation.

**Testing Record and Playback Capabilities**

You can use the Sound Recorder program on your computer to test your sound card's capabilities. To open the Sound Recorder, choose Start - Programs - Accessories - Entertainment - Sound Recorder.

To test your sound card:

2. Click the Record button (the button with the red circle).
3. Speak into your microphone to record your voice.
4. Click the Stop button.
5. Choose File - Save As, and then name and save the file.
6. To play the sound file, open the file and click the Play button.
Chapter 4: Working with Sametime Meetings

Sametime includes instant and scheduled meetings. You can start an instant meeting immediately by selecting the participants for the meeting and choosing an option for the meeting (such as Audio or Collaborate). You can create a scheduled meeting (to start right away or in the future) by entering meeting information on the New Meeting page of the Meeting Center.

The table below provides information about the two types of meetings.

<table>
<thead>
<tr>
<th>Instant Meetings...</th>
<th>Scheduled Meetings...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are created when a person clicks on an active (green) name in any part of Sametime (Sametime Connect, the Participant List of the Meeting Room, or a Sametime Discussion or TeamRoom).</td>
<td>Are created on the New Meeting page of the Meeting Center.</td>
</tr>
<tr>
<td>Note You must have permission to edit/share to start an instant meeting from the Participant List.</td>
<td></td>
</tr>
<tr>
<td>Occur immediately.</td>
<td>Can occur immediately or in the future.</td>
</tr>
<tr>
<td>Are best for small groups of people who need to meet quickly.</td>
<td>Are best for larger groups of people who have planned to meet.</td>
</tr>
<tr>
<td>Allow you to choose tools to start a meeting with any of the following options:</td>
<td>Allow you to choose a meeting type:</td>
</tr>
<tr>
<td>• Chat: Exchange text messages.</td>
<td>• Collaboration: For small, highly interactive meetings.</td>
</tr>
<tr>
<td>• Audio: Communicate using computer audio.</td>
<td>• Moderated Presentation or Demo: For moderately interactive meetings with a few presenters.</td>
</tr>
<tr>
<td>• Video: Communicate using computer audio and video.</td>
<td>• Broadcast Presentation or Demo: For large meetings without much interaction.</td>
</tr>
<tr>
<td>• Share: Present information using the whiteboard or screen sharing.</td>
<td>Tip Use the Tools tab to choose tools for the meeting.</td>
</tr>
<tr>
<td>• Collaborate: Use all of the available Sametime tools.</td>
<td></td>
</tr>
<tr>
<td>Include a Moderator. The Moderator is the person who starts the meeting.</td>
<td>Include a Moderator. The creator of the meeting chooses the Moderator.</td>
</tr>
</tbody>
</table>

continued
Allow you to define several characteristics for the meeting. For example, you can:
- Repeat the meeting at regular intervals.
- Record the meeting.
- Attach a file to present on the whiteboard or save an annotated whiteboard file.
- Define security options for the meeting (including a meeting password).
- Associate a telephone conference call with the meeting.

**Note** For more information about available options, see “Creating a Scheduled Meeting” later in this chapter.

### Working with Sametime Meetings

Sametime includes instant and scheduled meetings. You can start an instant meeting immediately by selecting the participants for the meeting and choosing an option for the meeting (such as Audio or Collaborate). You can create a scheduled meeting (to start right away or in the future) by entering meeting information on the New Meeting page of the Meeting Center.

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<th>Scheduled Meetings...</th>
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<td>Allow you to quickly choose tools and participants for the meeting. You can also secure the meeting content with encryption. All other meeting options (such as repeating the meeting) are unavailable for instant meetings.</td>
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<td>- Repeat the meeting at regular intervals.</td>
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<tr>
<td>- Record the meeting.</td>
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<tr>
<td>- Attach a file to present on the whiteboard or save an annotated whiteboard file.</td>
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</tr>
<tr>
<td>- Define security options for the meeting (including a meeting password).</td>
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</tr>
<tr>
<td>- Associate a telephone conference call with the meeting.</td>
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</tr>
<tr>
<td><strong>Note</strong> For more information about available options, see “Creating a Scheduled Meeting” later in this chapter.</td>
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</tr>
</tbody>
</table>
### Instant Meetings...

Allow you to choose tools to start a meeting with any of the following options:
- **Chat**: Exchange text messages.
- **Audio**: Communicate using computer audio.
- **Video**: Communicate using computer audio and video.
- **Share**: Present information using the whiteboard or screen sharing.
- **Collaborate**: Use all of the available Sametime tools.

Include a Moderator. The Moderator is the person who starts the meeting.

Allow you to quickly choose tools and participants for the meeting. You can also secure the meeting content with encryption. All other meeting options (such as repeating the meeting) are unavailable for instant meetings.

### Scheduled Meetings...

Allow you to choose a meeting type:
- **Collaboration**: For small, highly interactive meetings.
- **Moderated Presentation or Demo**: For moderately interactive meetings with a few presenters.
- **Broadcast Presentation or Demo**: For large meetings without much interaction.

**Tip** Use the Tools tab to choose tools for the meeting.

Allow you to define several characteristics for the meeting. For example, you can:
- Repeat the meeting at regular intervals.
- Record the meeting.
- Attach a file to present on the whiteboard or save an annotated whiteboard file.
- Define security options for the meeting (including a meeting password).
- Associate a telephone conference call with the meeting.

**Note** For more information about available options, see "Creating a Scheduled Meeting".

---

**Preparing for a Meeting**

All you need to know to make sure your IBM® Lotus® Sametime® meetings go smoothly, including:

- Getting started
- Using Sametime Connect
- Preparing to use computer audio and video
- Working with Sametime meetings
Having an Effective Meeting

Information that will help you make the most of your meeting, including:

- Attending and participating in a meeting
- Presenting information in a meeting (using the whiteboard and screen sharing)
- Communicating in a meeting (using chat and audio/video)
- Moderating a meeting

Finishing a Meeting

What you need to know to finish a meeting and view information about it when it is over.

Sametime Discussions and TeamRooms

Read this section if you plan to use a Discussion or IBM Lotus Sametime TeamRoom® to supplement your Sametime meetings.

Preparing for a Meeting

Getting Started with Sametime

- Getting Started with Sametime
- What's New in Sametime 3.1?
- What You Need to Use Sametime
- Accessibility Features
- Shortcut Keys
- Mnemonics
  - Mnemonics in the Meeting Room
  - Mnemonics in Broadcast Meetings
  - Mnemonics in Recorded Meetings
- Testing a Meeting
- Making Your Browser Work with Sametime
- Registering to Use Sametime
- Downloading the Meeting Room
• How to Handle Security Warnings
• Logging on to Sametime
• Passwords
  • Changing Your Password
• Customization by the Administrator
• Using Different Language Versions of Sametime

**Using Sametime Connect**
• Using Sametime Connect
• Downloading Sametime Connect
• Working with Sametime Connect
  • Determining Which Version of Sametime Connect You Are Using
  • Starting and Exiting Sametime Connect
  • Logging on and Setting Connectivity Preferences
  • Creating and Maintaining the Contact List
  • Managing Your Online Status
  • Sending Instant Messages
  • Customizing Your Instant Meeting Invitations
  • Using Alerts
  • Sametime Connect and AOL Instant Messenger
  • Defining Your Audio and Video Tools
  • Managing the Sametime Connect Window
• Accessing Other Areas of Sametime

**Preparing to Use Computer Audio and Video**
• Preparing to Use Audio and Video
• Supported Sound Cards
• Supported Cameras
• Using Sametime to Test Your Audio and Video
• Testing and Configuring Your Sound Card

**Working with Sametime Meetings**
• Working with Sametime Meetings
• Working with Scheduled Meetings
  • Preparing for a Scheduled Meeting

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Editing a Scheduled Meeting
Deleting a Scheduled Meeting
Accessing Meeting Details
Working with Instant Meetings
Checking Available Audio and Video Tools
Starting an Instant Meeting

Having an Effective Meeting

Attending and Participating in Sametime Meetings
- Attending and Participating in Sametime Meetings
- Viewing and Attending a Scheduled Meeting (without search)
- Viewing and Attending a Scheduled Meeting (with search)
- Special Options for Scheduled Meetings
- Attending an Instant Meeting
- Observing a Meeting
  - Viewing a Presentation
  - Viewing Meeting Information
  - Viewing Web Pages
  - Viewing Poll Responses Shared by the Moderator
- Participating in a Meeting
  - Using Permissions
  - Editing Files
  - Responding to Polls
  - Raising Your Hand
  - Transferring a File
  - Inviting Others to a Meeting
  - Responding to a Meeting Invitation
- Participating in a Broadcast Meeting
- Using Outlook to Schedule and Attend Sametime Meetings
- Using Lotus Notes to Schedule and Attend Sametime Meetings
- Configuring Sametime
  - Adding a Participant Name to the Contact List
  - Tips for Arranging the Meeting Room
Presenting Information in a Meeting

- Presenting Information in a Meeting
- Presenting Information with the Whiteboard
  - Presenting an Attached File
  - Creating a Presentation with the Whiteboard Tools
  - Drawing on the Whiteboard
  - Entering Text
  - Pointing to an Item on the Whiteboard
  - Customizing Your Presentation
  - Editing a Presentation
- Presenting Information with Screen Sharing
  - Ensuring Security
  - Tips for Improving Screen-Sharing Performance
  - Tips for Using Screen Sharing to Work Together
  - Using Screen Sharing for a Presentation
  - Using the Screen-Sharing Toolbar
  - How to Share Your Screen
  - Allowing Others to Control to the Shared Screen
  - Taking Control of the Shared Screen

Communicating in a Meeting

- Communicating in a Meeting
- Communicating with Meeting Room Chat
  - Editing a Meeting Room Chat Message
- Communicating with Computer Audio and Video
  - Tips for Improving Computer Audio Quality
  - Speaking During the Meeting
  - Muting Your Microphone or Your Speakers
  - Adjusting the Volume of Your Microphone or Speakers
  - Viewing the Participant Who Is Speaking
  - Viewing Your Own Video Image
  - Floating the Video Windows
  - Using a 360-Degree Video Camera with Sametime
  - Viewing or Hiding the Audio Controls and Video Windows

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• Using Audio and Video in Multiple Meetings
• Setting Audio/Video Preferences in the Meeting Room
• Troubleshooting Audio and Video During a Meeting

**Moderating a Meeting**

• Moderating a Meeting
• Conducting a Meeting
  • Making Sure That Everyone Has Arrived
  • Reviewing the Agenda
  • Handling Permissions
  • Attaching a File During a Meeting
  • Working with Raised Hands
  • Conducting an Audio Meeting
  • Monitoring the Length of the Meeting
  • Switching the Moderator
• Sending Information to Participants
  • Sending Web Pages
  • Sending Polls
  • Viewing and Sharing Poll Responses

**Finishing a Meeting**

• Finishing a Meeting
• Saving Meeting Information
• Leaving a Meeting
• Viewing Saved Meeting Information
• Working with a Recorded Meeting
  • Viewing a Recorded Meeting
  • Exporting (Saving) a Recording of a Meeting
  • Importing (Saving) a Recording of a Meeting
  • Replacing a Recording of a Meeting
  • Deleting a Recording of a Meeting
• Listening to a Recorded Telephone Conference Call
Using Sametime Discussions and TeamRooms

- Using Sametime Discussions and TeamRooms
  - Using a Discussion
  - Using a TeamRoom

Working with Scheduled Meetings

You can use the Meeting Center to work with scheduled meetings. For example, you can create a scheduled meeting on the New Meeting page of the Meeting Center. After you have created a meeting, you can view information about it (such as the time that the meeting begins and attachments for the meeting) on the Meeting Details page. If you need to make changes to the meeting or delete the meeting, you can click the Edit Meeting or Delete Meeting buttons on the Meeting Details page.

See the following topics for information about working with scheduled meetings:

- “Preparing for a Scheduled Meeting”
- “Creating a Scheduled Meeting”
- “Editing a Scheduled Meeting”
- “Deleting a Scheduled Meeting”
- “Accessing Meeting Details”
- “Attending a Scheduled Meeting”

Preparing for a Scheduled Meeting

You should prepare for a meeting, just as you would for a regular meeting. Follow these tips to help you prepare:

- Before attending your first meeting, attend a test meeting to ensure that Sametime is functioning properly.
- Be familiar with the purpose, content, and participants for your meeting. These factors will help you choose a meeting type when scheduling the meeting.
- Contact the people who will be attending your meeting before you schedule the meeting and find out how they access Sametime. Use the information in “Locations: Ensuring that Everyone Can Attend” to make sure everyone can access your meeting.
If you plan to attach a file to present on the whiteboard, follow the tips in “Preparing a File” to make sure that the file will display well. Also, see the list of file types to determine if Sametime can automatically convert your file for whiteboard display. If your file type is not in the list, use Sametime Print Capture to convert your file to a Sametime file (FST, or “File for Sametime”) for whiteboard display.

If you are unfamiliar with the available tools for meetings, use the information in “Tools: How to Get Your Work Done” and “Presenting Information in a Meeting” to help you make choices when scheduling the meeting.

Decide what type of audio to use in the meeting. Sametime allows you to use computer audio and video or to associate a telephone conference call with your meeting.

If your meeting includes confidential information, review the topic “Security: Protecting the Meeting” for ideas about keeping your meeting content private.

If you plan to use screen sharing in your meeting, you need to know how to protect the confidential information on your computer. Review “Ensuring Security” before sharing your screen.

If your organization uses NetMeeting for online meetings, review the information about using NetMeeting.

---

Creating a Scheduled Meeting

To create a scheduled meeting, start by clicking “Schedule a Meeting” on the Sametime Welcome page or by clicking New Meeting in the Online Meeting Center. Five New Meeting tabs appear: Essentials, Files, Security, Tools, and Locations.

To create the meeting, you must enter all of the information on the Essentials tab. Entering the information on the other tabs is optional. See the topics below for more information.

- “Essentials: What You Must Do”
- “Files: Attachments for the Whiteboard”
- “Security: Protecting the Meeting”
- “Tools: How to Get Your Work Done”
- “Locations: Ensuring that Everyone Can Attend”
Note Before you create a scheduled meeting, make sure that you are logged on to Sametime. If your system administrator requires you to log on to Sametime when you schedule meetings, the logon dialog box or page appears automatically. If the logon dialog box or page does not appear automatically, click “Log on to Sametime” in the upper right corner of the Meeting Center. When the dialog box or page appears, enter your user name and password and click OK.

Essentials: What You Must Do

Before you create a scheduled meeting, make sure that you are logged on to Sametime. If your system administrator requires you to log on to Sametime when you schedule meetings, the logon dialog box or page appears automatically. If the logon dialog box or page does not appear automatically, click “Log on to Sametime” in the upper right corner of the Meeting Center. When the dialog box or page appears, enter your user name and password and click OK.

Choosing a Meeting Type

The meeting types in Sametime provide different levels of interaction. The following table will help you choose the appropriate meeting type for your meeting. (Understanding the available tools and permissions is also useful when choosing a meeting type.)

<table>
<thead>
<tr>
<th>Meeting Type</th>
<th>When to Use</th>
<th>Tools Included</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collaboration</td>
<td>• For small meetings with two to five participants&lt;br&gt;• For highly interactive meetings with several presenters and frequent communication</td>
<td>• All tools except audio and video are included by default.&lt;br&gt;• You can remove tools on the Tools tab of the New Meeting page.</td>
</tr>
<tr>
<td>Moderated Presentation or Demo</td>
<td>• For a large presentation, structured meeting or seminar with 10 or more participants&lt;br&gt;• For moderately interactive meetings with a few presenters</td>
<td>• All tools except audio and video are included by default.&lt;br&gt;• You can remove tools on the Tools tab of the New Meeting page.</td>
</tr>
</tbody>
</table>

continued
For presenters, all tools except audio and video are included by default. Most participants in the meeting only watch and listen; they cannot interact with others. (See “Participating in a Broadcast Meeting” for more information.) You can remove tools on the Tools tab of the New Meeting page.

<table>
<thead>
<tr>
<th>Meeting Type</th>
<th>When to Use</th>
<th>Tools Included</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broadcast Presentation or Demo</td>
<td>• For a large presentation or demonstration where most participants only need to watch and listen. <strong>Note</strong> The administrator determines if you can schedule a broadcast meeting.</td>
<td>• For presenters, all tools except audio and video are included by default. • Most participants in the meeting only watch and listen; they cannot interact with others. (See “Participating in a Broadcast Meeting” for more information.) • You can remove tools on the Tools tab of the New Meeting page.</td>
</tr>
</tbody>
</table>

**Tip** Once a meeting begins, you cannot switch to another type of meeting. However, the Moderator can use permissions to change the level of interaction in a Moderated Presentation or Demo or Collaboration meeting to effectively switch to the other meeting type.

**Naming the Meeting**

Enter a name for the meeting. You can use any characters in the meeting name, including letters, numbers, spaces, and symbols. Try to choose a name that other participants will recognize. (When participants attend an unlisted meeting, they must enter the meeting name exactly as it is entered on the Essentials tab.)

**Choosing a Moderator**

The Moderator conducts the meeting and controls participation during the meeting. The Moderator can grant and remove permission to:

• Draw on the whiteboard.
• Share a screen.
• Control a shared screen.
• Transmit computer audio and video.
• Start instant meetings from the Participant List.

When you create a meeting, you are the Moderator by default. You can choose another Moderator for the meeting so that someone else conducts the meeting and controls permissions for the meeting. For example, if you are scheduling the meeting for someone else, you might want to choose that person as the Moderator.
Expected Participants

If your version of Sametime includes an “Expected participants” field on the Essentials tab, enter the number of participants that you expect to attend the meeting. When you save the meeting, Sametime checks to see if there is enough space on the server for your meeting:

- If there is enough space for your meeting, the meeting is saved and the Meeting Details page appears.
- If there is not enough space for your meeting, your meeting cannot be scheduled at your preferred time. Return to the Essentials tab and choose a new time for the meeting or select fewer participants for the meeting.

Tip If some of the participants in your meeting are at the same location, you might want to suggest that they meet in the same room. When you schedule the meeting, you can count this group of people as one participant.

Scheduling the Meeting

1. Do one of the following:
   - Choose Start Now to begin your meeting immediately. Go to step 4.
   - Choose Schedule to choose a future date and time for your meeting. Continue to step 2.

2. If you chose Schedule in step 1, use the following controls to choose a date for the meeting to start:
   - Double arrows: Change the month of the meeting.
   - Single arrows: Change the day of the meeting.

   Tip You can choose any present or future date for your meeting. You can also enter the date directly in the Date field.

3. If you chose Schedule in step 1, choose a time for your meeting to start. You might see any of the following controls:
   - Double arrows: Change the time of the meeting in increments of one hour.
   - Single arrows: Change the time of the meeting in increments of 15 minutes.
   - A calendar icon: Choose any month and day for the meeting. The date you choose appears in the Date field on the New Meeting page.

   Tip You can choose any present or future time for your meeting. You can also enter the time for your meeting directly in the Time field.
4. Choose a duration for the meeting. You might see any of the following controls:
   - **A Duration field with double and single arrows on either side.** Use the double arrows to change the length of the meeting in increments of an hour. Use the single arrows to change the length of the meeting in increments of 15 minutes. You can also enter the duration directly in the Duration field.
   - **Separate fields for hours and minutes.** Use the arrows next to the “hours” field to change the length of the meeting in increments of one hour. Use the arrows next to the “minutes” field to change the length of the meeting in increments of fifteen minutes. You can also enter the duration directly in the “hours” and “minutes” fields.

   **Tip** You can also enter the duration directly in the Duration field. If you use am and pm, you can type 3p to jump to 3 pm. If you use 24-hour time, you can enter the time without the zeros. For example, enter 15 to schedule for 15:00.

**Repeating the Meeting**
You can repeat a meeting that you are scheduling. For example, you can repeat the meeting every Tuesday at 10:00 a.m. for two months. When you repeat a meeting, the Moderator for the first meeting is the Moderator for every meeting in the series.

**Recording the Meeting**
You can record the meeting by selecting the “Record this meeting so that others can replay it later” check box. You might want to record the meeting if a large number of people are unable to attend but would benefit from viewing it at a later time.

**Choosing Presenters for a Broadcast Presentation or Demo**
If your meeting is a Broadcast Presentation or Demo, you can choose presenters for the meeting. Presenters in the meeting can use all tools in the meeting and can interact during the meeting.

If you are finished scheduling your meeting, click Save. Otherwise, proceed to the appropriate tab to enter more information for the meeting.

**Caution** If there is not enough space on the server for your meeting, the meeting is not scheduled after you click Save. Return to the Essentials tab and choose a new time for the meeting.

**Note** If your system administrator has configured Sametime so that all meetings require a password, you might need to enter a meeting password before you can save the meeting. See “Security: Protecting the Meeting” for information about the meeting password.
Choosing a Moderator

The Moderator conducts the meeting and controls participation during the meeting. The Moderator can grant and remove permission to:

- Draw on the whiteboard.
- Share a screen.
- Control a shared screen.
- Transmit computer audio and video.
- Start instant meetings from the Participant List.

When you create a meeting, you are the Moderator by default. You can choose another participant to be the Moderator.

To choose a Moderator other than yourself for the meeting:

1. Make sure that you are logged on to Sametime.
2. Click Change on the Essentials tab of the New Meeting page in the Meeting Center.
3. If necessary, select a Directory in the Directory drop-down box. For example, you might want to make sure that your company's Directory appears in the box.

   **Note** If there is only one choice in the Directory drop-down box, your organization only has one Directory available. See your system administrator for more information.

4. To search for a name, enter the name in the “Search for person or group” field. You must enter an individual person (not a group name) in this field; there can only be one Moderator for a meeting. Enter a last name in the field, or enter a last name followed by a first name. You can also use the previous and next buttons to view the names in the Directory rather than searching for a name.

5. If you entered a name in the “Search for person or group” field, click Search.
6. Select the appropriate name in the box.

   **Tip** Use the arrows to move through the pages in the Directory.

7. Click OK. The name of the Moderator appears in the Moderator field on the Essentials tab, replacing the previous name.
Recording the Meeting

To record a meeting, select the check box labeled “Record this meeting so that others can replay it later.” You might want to record the meeting if a large number of people are unable to attend but would benefit from viewing it later.

When you record a meeting, it is available on the Meeting Details page after the meeting is over. Anyone who has access to the meeting can click a button on the Meeting Details page to view the meeting. The meeting appears in a separate window that includes controls for playing, pausing, and stopping the meeting. In addition to viewing the recording, the Moderator, meeting creator, and system administrator can export, replace, or delete the recording.

Before recording a meeting, you should be familiar with the following information:

- You cannot choose to record a meeting after it begins; you must select the “Record this meeting...” option when scheduling the meeting.
- The recording might differ slightly from the original meeting for the following reasons:
  - Some features are unavailable for recorded meetings. For example, you cannot see the mouse pointer in a shared program when viewing a recorded meeting.
  - The sampling rate of recording is sometimes slower than the rate of the actual meeting. This situation can cause the recorded meeting to lose some information that was available in the original meeting. (This data loss is usually minor.) Data loss is particularly common when the creator of the original meeting selects the “People are attending using a modem” check box on the Locations tab of the New Meeting page when creating the meeting.
  - You can only record a scheduled meeting; you cannot record instant meetings.
  - You cannot use Sametime to edit a recorded meeting after it is over. For example, you cannot remove segments of the meeting. (If your system administrator has a tool for editing recorded meetings, you can use that tool to edit the recording. See “Replacing a Recording of a Meeting” for more information.)
  - The creator of the meeting, the Moderator, and the system administrator can:
    - Export (Save) a recorded meeting to another computer.
    - Replace a recording of a meeting with another recording.
• Delete a recording of a meeting.
• Import (Save) a recorded meeting to another computer.
• You cannot view a recorded meeting until the meeting has finished.
• The default name of the recorded meeting is a number. If you export the
  recording, you should change the name.
• If you record a meeting that uses NetMeeting, only the audio and video
  in the meeting are recorded.
• You must view a recorded meeting from the server where the meeting
  was created. See your system administrator for more information.

  **Note**  If your system administrator has imported a recorded meeting to
  a specific server, you can view the recorded meeting on that server, even
  if the meeting took place on a different server. For example, an
  administrator can import a recorded meeting to the server
  www.sametime.com. You can then enter www.sametime.com in your
  browser and view the recording of the meeting, even if the meeting took
  place on a different server. If this feature is not available in your version
  of Sametime, see your system administrator.

If you record a very long meeting that lasts several hours or days, and people
attend and leave the meeting periodically, the recording might include
intervals with no meeting activity. In addition, a long meeting can consume a
great deal of space on the server.

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**Importing (Saving) a Recording of a Meeting**

The "Import recording" feature enables you to add a recorded meeting to a
Sametime server on which the meeting did not previously exist. In a multiple
server environment, this feature may be used to distribute recorded
meetings to multiple servers or to move recorded meetings from one server
to another. Only Sametime RAP files can be imported using this feature.

When importing a recorded meeting file, you can accept or change the
following meeting details for the recorded meeting:

• Meeting name
• Restrict the meeting to the following people
• Meeting password
• Secure this meeting using encryption
• Secure this meeting by not listing it in the Sametime Online Meeting Center

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After you accept or change the meeting details, a Meeting Details document appears on the Sametime server for the imported meeting. The Meeting Details document includes the specifications you made while importing the meeting. Users access this new Meeting Details document from the "Recorded" view of the Sametime Meeting Center to play the recording of the meeting.

**Note** You must export a meeting before you can import it. Exporting the meeting allows you to save a copy of the meeting on a network drive. You can also change the recorded meeting file name to an easily identifiable name when exporting a meeting. For more information, see Export (Save) a recorded meeting.

To import a recorded meeting to a Sametime server:

1. Use a Web browser to browse to the home page of the Sametime server to which you want to import the recorded meeting file.
2. Click the "Attend a Meeting" link.
3. Click the "Import Recording" link.
   **Note** If the Import Recording link is not visible, click the "Log on to Sametime" link beneath the date and time, and log on as the administrator. The administrator must be assigned the Sametime Admin role in the ACL of the Sametime Meeting Center (stconf.nsf) to see the Import Recording link.
4. On the "Import a Recorded Meeting" dialog box, browse to and select the recorded meeting file (RAP file) that you want to import.
   **Note** Browsing to the directory that holds all RAP files on the other Sametime server is not recommended because the RAP files do not have easily identifiable file names by default. The files are named according to unique numerical identifiers assigned to each meeting. Lotus software recommends that you use the Export (Save) a recorded meeting feature to rename and copy the RAP file to a different directory before importing the meeting to a different Sametime server.
5. Click OK.
   **Note** It might take several seconds for the file to be imported to the server. The meeting creation screen appears when the import process concludes.
6. The meeting creation screen displays the values specified by the original creator of the meeting. The administrator can change or accept the following values in the meeting creation screen. All values specified in this screen will be reflected in the Meeting Details document for the recorded meeting in the Sametime Meeting Center.
• **Meeting name** - The administrator can change the meeting name.

• **Meeting start date, time, and duration** - These fields contain read-only information that cannot be changed.

• **Restrict the meeting to the following people** - The administrator can remove or add names to the restriction list. If the restriction list contains any user names, only those users can replay the recorded meeting. If you want to allow any user to replay the meeting, remove all names from the restrictions list.

• **Meeting password** - If a series of asterisks (*****) displays in the "Meeting password" field, the original meeting was password-protected. If you leave the asterisks in the "Meeting password" field, the recorded version of the meeting will be password-protected by the password that was specified by the original creator of the meeting.

  If you delete these asterisks and leave the "Meeting password" field blank, the recorded meeting will not be password-protected.

  To change the password, delete the asterisks and enter a new password in the "Meeting password" field. The recorded version of the meeting will be password-protected by the new meeting password that you enter.

• **Secure this meeting using encryption** - Select this option if you want the recorded version of the meeting to be encrypted when it is streamed from the server to the Broadcast client. The meeting stream is encrypted using RC2 encryption with a 128-bit encryption key. Clear the check mark from this option if you do not want the recorded version of the meeting to be encrypted.

• **Secure this meeting by not listing it in the Sametime Online Meeting Center** - If the administrator selects this option, the recorded version of the meeting is not listed in the Meeting Center and can only be accessed from the View Unlisted link in the Meeting Center. If this option is not selected, the recorded meeting is listed in the Recorded view in the Meeting Center.

  **Note**  Attachments can also be added to the meeting by the person who is importing the recorded meeting file. These attachments can be downloaded by any user with permission to play the recorded meeting.

7. Click Save. Users can now access the Meeting Details document from the Recorded view of the Sametime Meeting Center to replay the recorded version of the meeting.
Choosing Presenters for a Broadcast Presentation or Demo

If your meeting is a Broadcast Presentation or Demo, you can choose presenters for the meeting. Presenters in the meeting can use all tools in the meeting and can interact during the meeting. The Moderator for the meeting is automatically a presenter in the meeting.

**Note** The administrator determines if you can schedule a broadcast meeting.

1. Click “Add or Remove Presenters” on the Essentials tab of the New Meeting page in the Meeting Center.

2. If necessary, select a Directory in the Directory drop-down box. For example, you might want to make sure that your company’s Directory appears in the box.

   **Note** If there is only one choice in the Directory drop-down box, your organization only has one Directory available. See your system administrator for more information.

3. Enter a name or group in the “Search for person or group” field. You can enter a last name in the field, or you can enter a last name followed by a first name.

4. Click Search.

5. Select the appropriate name or group in the box.

   **Tip** Use the arrows to move through the pages in the Directory.

6. (Optional) To see the names of people in a group, select the group and click Contents. View the members of the group in the Group Contents dialog box and click OK.

7. Do one of the following:
   - To choose the selected person or group as a presenter, click Add. The name of the person or group is added to the Presenters box on the right of the dialog box. (If you select a group of people as presenters, all members of that group can present during the meeting.)
   - To remove the selected person or group as a presenter, click Remove. The name of the person or group is removed from the Presenters box on the right of the dialog box.

8. Repeat steps 2 - 7 as necessary until you have selected all presenters for the meeting.

Repeating the Meeting

You can repeat a meeting that you are scheduling. For example, you can repeat the meeting every Tuesday at 10:00 a.m. for two months. When you repeat a meeting, the Moderator for the first meeting is the Moderator for every meeting in the series.

When you schedule a telephone conference call with your meeting, you can only use some of the available options for repeating the meeting. For example, when your meeting includes a telephone conference call, you cannot schedule a series of meetings that results in more than 100 meetings. If there is a problem scheduling the conference calls for a series of meetings, the series of meetings is not saved.

Note You can use Sametime to schedule a telephone conference call only if your server includes this capability. See your system administrator for more information.

To schedule a repeating meeting:

1. After choosing a date and time for the meeting to start, click Repeat.

2. In the Repeat Rules dialog box, use the “Repeat meeting” field to specify how often you want to repeat the meeting: Daily, Weekly, “Monthly by Date,” “Monthly by Day,” Yearly, or Custom.

   If you are scheduling a telephone conference call with the meeting, you must select either Daily, Weekly, or “Monthly by Date” in the Repeat field. You must also make the following selections:

   • For each option, you must select only one day or date to repeat the meeting. For example, you can repeat the meeting every Monday, but you cannot repeat it every Monday and Wednesday. Similarly, you can repeat the meeting every month on the first day, but not on the first and second day.

   • If you select Weekly, you can only repeat the meeting every week or every second week. The first meeting in the series must be the same day of the week as the chosen repeat day. For example, if the first meeting is scheduled for a Monday, then all other meetings in the series must also occur on Mondays.

3. Enter the date for the first meeting in the “Starting date” field.

   Tip You might see double arrows, single arrows, or a calendar next to the “Starting date” field. See “Scheduling the Meeting” for information about these controls.

4. If you chose Custom in step 2, enter the dates you want to repeat the meeting and go to step 7.
5. Do one of the following:
   • Click Until and enter the last date for the meeting series.
   • Click For and specify how long you want to continue the meeting series.

   **Note** You must click “For” if you are scheduling a telephone conference call with the meeting.

6. If you chose to repeat the meeting Daily, “Monthly by Date,” or Yearly, specify a choice for weekend meetings: Don't Move, “Move to Friday,” “Move to Monday,” “Move to Nearest Weekday,” or Delete.

   **Note** If you are scheduling a telephone conference call with the meeting, you must select Don't Move.

7. Click OK to close the dialog box and return to the Essentials tab. When you save your meeting, Sametime creates a series of meetings with the settings you selected in the Repeat Rules dialog box.

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**Files: Attachments for the Whiteboard**

You can use the whiteboard to present an attached file during a meeting. You can use the Files tab to attach the file when scheduling the meeting. The Moderator can also attach files during a meeting.

**Note** Some servers do not support all whiteboard attachments (including the supported file types listed below). If you have difficulty attaching a file to the whiteboard, contact your system administrator.

During a scheduled meeting, you can make changes to a whiteboard file and ask the Moderator to save your changes. (Only the Moderator can save a whiteboard file.) The changes are saved in two new files (an RTF file and an SWB file); your original file is not affected. The original file and any changed versions of the file are available on the Meeting Details page. (You cannot save a whiteboard file in an instant meeting.)

**Detailed Description**

You can also use the Files tab to enter any additional information about the meeting in the “Detailed meeting description” field. For example, you can enter an agenda for the meeting. After you save the meeting, the detailed description and the attached files appear on the Meeting Details page.

**Tip** If you attach files to your meeting, you might want to give the meeting a password to protect your files. If the meeting is password-protected, you must enter the password before viewing the Meeting Details page.
Preparing a File

Before attaching a file to the whiteboard, you must prepare the file. For example, you might create a file in a word processing or presentation program. When you attach a file, it is converted to an appropriate format for whiteboard display. Read the information below to prepare files that display well on the whiteboard.

General Tips for Whiteboard Files

When creating the file, follow these tips to ensure that it displays well on the whiteboard:

• Limit the pages or slides in your presentation to 100 or less. (You can have multiple presentations of 100 slides, but no single presentation should contain more than 100 slides.) To include a file with more than 100 pages, split the file into two or more files that contain less than 100 pages and attach the files to the whiteboard sequentially.

• Use a simple background for your presentation, such as a solid color or a gradient that fills vertically. White backgrounds work well.

• Before the actual meeting, start a short online meeting, attach your file, and attend the meeting to view the file on the whiteboard. By previewing the presentation, you ensure that everything displays as expected. You can also plan how you will use annotation to highlight key points as you present.

• If your file uses a font that is not on the server, the whiteboard displays the nearest match to that font. Use common fonts (such as Times New Roman or Arial) in your file to be sure that it displays as expected.

• Use Sametime Print Capture for files that are created in a spreadsheet program such as IBM Lotus 1-2-3®. You should also make sure your file is saved in “landscape” orientation. (See “More Help on Sametime Print Capture” for more information.)

• Use Sametime Print Capture for files with embedded objects that are created in a word processing program such as IBM Lotus Word Pro®.

• Headings in presentations sometimes display as one line of text in the presentation program but wrap onto a second line when displayed on the whiteboard. To prevent headings from wrapping, use short headings, make sure that the text box you use to create the text is longer than the text itself, and use a common font for your headings.

• If you use IBM Lotus Freelance Graphics® to create your presentation, see “Tips for Lotus Freelance Graphics Presentations.”
Tips for Graphics in Whiteboard Files

Follow these tips to ensure that the graphics in your whiteboard presentation display well:

- Use only high-resolution 8-bit JPG or GIF graphics with a maximum of 256 colors in your presentation. The whiteboard conversion process restricts graphics to 256 colors and substitutes the closest color match for any graphics that exceed the restriction. If you are using a prepared presentation template, make sure all graphics in the template are JPGs or GIFs.

- When you use a highly detailed graphic such as a screen capture from a program, save it as a JPG or GIF at approximately twice the normal size. (If you use a standard size, the graphic will scatter.) For example, if you use a graphics program to take a screen capture, save the screen capture at a ratio of 1:2 or 1:3 rather than 1:1. You can reduce the graphic to its normal size after placing it in your presentation.

- Do not remove or copy a graphic from a file in one program and place it into a file in another program. For example, if you create a graphic in a Lotus Word Pro file and then paste it into a Lotus Freelance Graphics presentation, the graphic does not convert well for whiteboard display. (Pasted graphics might appear on the whiteboard as a gray box or a box with colored lines in it.)

- Do not use links to graphics in your presentation; include the graphic itself.

- Do not use animation in graphics or presentations. The whiteboard cannot display animation.

- Do not use bitmap graphics (BMPs) in your presentations. Bitmaps do not always display well on the whiteboard.

File Conversion

Before your file can be displayed on the whiteboard, it must be converted to an appropriate format. Sametime automatically converts many file types for whiteboard display. If Sametime cannot convert your file automatically, use Sametime Print Capture to convert the file to a Sametime file (FST, or “File for Sametime”) for whiteboard display.

**Note** Some servers only support the Sametime file format. To convert a file to the Sametime format, use Sametime Print Capture. For more information about whether you should use Sametime Print Capture, contact your system administrator.
Sametime automatically converts many file types, including:

- Bitmap (BMP)
- CCITT Group 3 Fax (TIF)
- CompuServe Graphics Interchange Format (GIF)
- Computer Graphics Metafile (CGM)
- HTML (HTM, HTML)
- IBM Lotus Ami Pro® (SAM)
- IBM Lotus PIC (PIC)
- JPEG (JPEG, JPG)
- Lotus 1-2-3 (WK3, WK4, 123)
- Lotus Freelance Graphics (PRE, PRZ)
- Lotus Word Pro (LWP)
- Microsoft Excel (XL*)
- Microsoft Word (DOC)
- Paintbrush/DCX (multi-page PCX) (PCX)
- PICT and PICT Graphics (PCT)
- Portable Network Graphics (PNG)
- PowerPoint® (PPT)
- Revisable Form Text (RFT)
- Rich Text Format (RTF)
- Sametime Print Capture File (FST)
- Sametime Whiteboard File (SWB)
- Tagged Image File Format (TIFF, TIF, EPS)
- Text file (ASCII) (TXT, BAT, INI)
- Windows Metafile Graphic (WMF)
- WordPerfect (WPD)
- WordPerfect Graphics (WPG)

After attaching your files, click Save if you are finished scheduling your meeting. Otherwise, proceed to the appropriate tab to enter more information for the meeting.
Attaching Whiteboard Files

When scheduling a meeting, you can attach files to display on the whiteboard. (The Moderator can also attach files after the meeting has started.) The files appear on the whiteboard when you attend the meeting. Although you can attach more than one file to the whiteboard for each meeting, you must attach each file individually. The Moderator can also attach files during a meeting.

**Note** During a scheduled meeting, you can make changes to the file and ask the Moderator to save your changes. Only the Moderator can save a whiteboard file. The changes are saved in two new files (an RTF file and an SWB file); your original file is not affected. The original file and any changed versions of the file are available on the Meeting Details page. You cannot save a whiteboard file in an instant meeting.

To attach files:

1. Click “Attach a File” on the Files tab.
2. Click the link to check file formats in the Whiteboard Attachments dialog box and search for your file type in the list of files that Sametime can automatically convert for whiteboard display.
3. Do one of the following:
   - If Sametime can automatically convert your file type, click Browse to select the file from your computer. Continue to step 4.
   - If Sametime cannot automatically convert your file type, click the Sametime Print Capture link in the Whiteboard Attachments dialog box to download Sametime Print Capture. After downloading Sametime Print Capture, you must install it on your computer and use it to convert your file to a Sametime (FST, or “File for Sametime”) file for whiteboard display. After converting your file, return to the Files tab on the New Meeting page to attach the file to the whiteboard.
4. Click OK.
5. Repeat steps 1 - 4 until you have attached all of the files that you want to display on the whiteboard.
   - **Note** Each file that you attach to a meeting must have a unique name. You cannot attach two files with the same name to a meeting.
6. After you have attached all of the files, click Save on the New Meeting page or continue to the appropriate tab to enter more information for the meeting. After you save the meeting, the files you have attached will appear in the first drop-down box in the whiteboard.
**Note** If you are having difficulty attaching a file, the Meeting Center might have reached the limit of information it can hold. Check with your system administrator to ensure that the finished meetings on the Meeting Center have been archived or deleted.

**Tip** You can delete files when editing a meeting.

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**Converting Files with Sametime Print Capture**

If Sametime cannot automatically convert a file for whiteboard display, use Print Capture to convert your file to a Sametime file (FST, or “file for Sametime”). See the list of file types to determine if Sametime can automatically convert your file. Print Capture is a “virtual printer” that allows you to convert files for display on the whiteboard. Before using Print Capture, you must download and install it on your computer.

**Note** Some servers require you to use Print Capture to convert a file before you attach it to the whiteboard. For more information about whether you must convert your file, contact your system administrator.

**Downloading and Installing Sametime Print Capture**

To download and install Print Capture, begin on the Sametime Welcome page. To get to the page, enter the following address in a Web browser: http://servername, where “servername” is the name of the server.

**Tip** You must enter the fully qualified Domain Name System (DNS) name of the server. For example, if your server is http://www.sametime.com, you must enter the full name; you cannot enter "sametime" or "sametime.com." (See your administrator if you do not know the fully qualified DNS name of the server.)

1. On the Sametime Welcome page, click Download.
2. On the Download page, click the Print Capture link.
3. Do one of the following:
   - If you are using Microsoft Internet Explorer, select “Save this program to disk” in the File Download dialog box and click OK. In the Save As dialog box, choose a location to save the print capture file and click Save.
   - If you are using Netscape Communicator, click Save File in the Unknown File Type dialog box. In the Save As dialog box, choose a location to save the print capture file and click Save.
4. Open the print capture file from its location on your computer. Print Capture is installed. You must restart your computer to use Print Capture.
**Note** You can also download Print Capture from the Files tab of the New Meeting page. Click “Attach a File” and then click the Print Capture link to go to the Download page. Follow steps 2 - 4 above.

**Using Sametime Print Capture**

You can open a file in any Windows program and use Print Capture to convert the file to FST (or “File for Sametime”) format for whiteboard display. Print Capture allows you to configure the color, size, orientation, and resolution of the file to meet your specific needs. You can also generate files that are much larger than your screen can display, so that you can use full-page documents or drawings at full resolution during your meeting. This larger-than-screen capability allows you to use large drawings without sacrificing detail.

To create a file for whiteboard display:

1. Open the Windows program and the document that you want to display on the whiteboard.
2. Choose File - Print.
3. In the Print dialog box, select Print Capture as the printer.
   **Note** To modify paper size, resolution, orientation, or color, click Properties or Preferences in the Print dialog box, and then click OK.
4. Select the page(s) you want to print, and then click OK or Print.
   **Note** Each page of your document that is denoted by a page break becomes a separate page in the whiteboard file.
5. When the Print Capture dialog box appears, enter the file name for the file that you want to display on the whiteboard. Use the Folders section of the dialog box to choose a drive and directory for the file. Click OK. (If you are using Windows XP and you select “Print to File,” the Print Capture dialog box does not appear. See step 3 for more information.)
6. When the conversion is complete, you can create a new meeting in the Online Meeting Center and attach the file. The Moderator can also attach the file during your meeting.
   **Note** If you are using Sametime Print Capture on Windows XP, ensure that you do NOT select the “Print to file” option. If you use the “Print to file” option, your file will not display correctly on the whiteboard.

**More Help on Sametime Print Capture**

The Print Capture help includes more information about print capture features. The method to access the print capture help depends on your computer's operating system.
**Windows NT or Windows 2000**
To access the print capture help in Windows NT or Windows 2000:

1. In the Print dialog box, select Print Capture as the printer.
2. Click OK.
3. Click Help in the Print Capture dialog box.

**Windows XP**
To access the print capture help in Windows XP:

1. In the Print dialog box, select Print Capture as the printer.
2. Ensure that the “Print to file” check box is not selected.
3. Click Print.
4. Click Help in the Print Capture dialog box.

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**Tips for Lotus Freelance Graphics Presentations**

The following information will help you create IBM Lotus Freelance Graphics presentations that display well on the whiteboard.

**Transparent Colors**

The whiteboard does not support transparent colors on images embedded in Lotus Freelance Graphics presentations.

**"Click Here" Boxes**

If your Lotus Freelance Graphics template has boxes that say “Click here to...” to guide you in placing various elements, follow these suggestions to prevent the boxes from appearing on the whiteboard:

- Edit the page layout and remove the unwanted prompt.
- Use a page layout that does not have “Click here” prompts.
- Replace the prompt with the suggested content.

**Testing Lotus Freelance Graphics Files**

To test your Lotus Freelance Graphics presentation for use on the whiteboard:

2. Choose File - Internet - “Convert to Web Pages.”
3. Click OK.
4. Click Next, and then click Next again.
5. Each page is converted to a GIF file. If your computer slows down and becomes almost unusable on one of the pages, the whiteboard will not be able to convert your presentation correctly. Review your presentation and make sure you have followed the tips in “Preparing a File”.

**Tools: How to Get Your Work Done**

Sametime meetings include two types of tools: those that allow you to exchange and present information (polling, send Web pages, screen sharing, and the whiteboard) and those that allow you to communicate with other people in the meeting (Meeting Room chat, audio, and video). During a meeting, the Moderator can grant and remove permission to use the tools.

You can use the Tools tab to select tools for your meeting. By default, every scheduled meeting includes the whiteboard, screen sharing, Meeting Room chat, polling, send Web pages, and computer audio and video. (In a Broadcast Presentation or Demo, only presenters receive Meeting Room chat, polling, and send Web pages.)

**Note** The system administrator determines which tools are available on your server. If a tool is unavailable, see your system administrator for more information.

You can remove tools from your meeting, or you can substitute a telephone conference call for computer audio and video in your meeting. You can also use NetMeeting (a Microsoft program) instead of Sametime to share a screen, draw on the whiteboard, and communicate with computer audio and video.

**Choosing Tools**

To choose a tool for your meeting, select the check box or radio button next to the tool. If you do not want to use the tool, make sure that the tool is not selected.

The table below lists the tools that are available for your meeting and describes the permissions associated with each tool. Use the table to choose the appropriate tools for your meeting.

**Note** For more information about screen sharing and the whiteboard, see “Presenting Information in a Meeting.”

After selecting the tools for your meeting, click Save if you are finished scheduling the meeting. Otherwise, proceed to the appropriate tab to enter more information for the meeting.

**Caution** If there is not enough space on the server for your meeting, the meeting is not scheduled after you click Save. Return to the Essentials tab and choose a new time for the meeting.
<table>
<thead>
<tr>
<th>Tool</th>
<th>Purpose</th>
<th>Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting Room Chat</td>
<td>Allows you to send messages to everyone in the meeting</td>
<td>No permission required; anyone can use Meeting Room chat when it is available.</td>
</tr>
<tr>
<td>Send Web page</td>
<td>Allows the Moderator to simultaneously direct all participants' Web browsers to a specific Web page</td>
<td>No permission required; anyone can view Web pages. <strong>Note</strong> Only the Moderator can send Web pages.</td>
</tr>
<tr>
<td>Polling</td>
<td>Allows the Moderator to send questions to participants and to collect the responses</td>
<td>No permission required; anyone can respond to polls and view shared poll responses. <strong>Note</strong> Only the Moderator can send polls and share the responses.</td>
</tr>
</tbody>
</table>
| Screen Sharing       | Allows you to share your screen or a computer program with other participants | Permission to edit/share allows you to:  
  • Share the screen.  
  • Control someone else's shared screen. |
| Whiteboard           | Allows you to present files, draw images, and enter text              | Permission to edit/share allows you to:  
  • Draw on the whiteboard.  
  • Present an attached file. |
| Computer Audio and Video | Allows you to speak with other participants and if using video, to be seen by them **Note** If you use computer audio and video in your meeting, ensure that the participants have the required equipment. | Permission to speak allows you to:  
  • Speak into your microphone.  
  • Transmit your video image while you are speaking. |

*continued*
<table>
<thead>
<tr>
<th>Tool</th>
<th>Purpose</th>
<th>Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone Conference Call</td>
<td>Allows you to associate a telephone conference call with your meeting. Participants can join the call to communicate during the meeting. <strong>Note</strong> You can use Sametime to schedule a telephone conference call only if your server includes this capability. See your system administrator for more information.</td>
<td>No permission required; anyone can speak during the conference call.</td>
</tr>
<tr>
<td>NetMeeting</td>
<td>Allows you to conduct an online meeting with screen-sharing and whiteboard tools <strong>Note</strong> NetMeeting is not a Sametime tool; it is a Microsoft product.</td>
<td>NetMeeting does not support Sametime permissions.</td>
</tr>
</tbody>
</table>

### Including a Telephone Conference Call in the Meeting

You should be familiar with the following information before you use a telephone conference call as the audio for your meeting:

- You can use Sametime to schedule a telephone conference call only if your server includes this capability. See your system administrator for more information.

- The call is scheduled using MeetingPlace™ from Latitude Communications™. MeetingPlace is a conference server that reserves telephone lines for your call.

- A telephone number for the call is automatically assigned and appears on the Meeting Details page.

- Your call is saved when you save the online meeting. If you have a problem scheduling your call, the meeting will not be saved.

- You can change information for the call when you change information for the meeting. For example, you can reschedule or cancel the call by editing the meeting.

- Information about the call appears on the Meeting Details page.
During an active meeting, information about the call appears in the bottom right corner of the Meeting Room and in the meeting details for the meeting. To attend a call, you can either click “Join Call” and enter your own phone number in the “Join Telephone Conference Call” dialog box, or you can dial the number provided for the call. The system administrator determines how you can attend the call.

To include a telephone conference call in the meeting:

1. Select the “Telephone conference call” radio button under Audio/Video on the Tools tab.
2. Enter a MeetingPlace user name and password if required or if you have a personal account. Your system administrator can provide you with your MeetingPlace user name and password. See your administrator for more information.
3. Enter the number of locations for the call. For example, if you are joining the call from Atlanta, two of your colleagues are calling in from Houston, and three more coworkers are calling in from Dublin, you would enter 3 in the “Number of locations” field. (You only need to count locations, not the number of people in each location.) A phone line is reserved for each location.
4. To set options for the call, such as a telephone conference call meeting ID and password, click Options. If you do not set options for your call, a telephone conference call meeting ID is automatically assigned to the call.

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**Setting Options for a Telephone Conference Call**

You can set the following preferences for your conference call in the Telephone Conference Call Options dialog box. A telephone number for the call is automatically assigned and appears on the Meeting Details page after you save the meeting.

**Note** You can use Sametime to schedule a telephone conference call only if your server includes this capability. See your system administrator for more information.

To set options:

1. Select the “Telephone conference call” radio button on the Tools tab of the New Meeting page in the Meeting Center.
2. Enter a MeetingPlace user name and password if required or if you have a personal account. Your system administrator can provide you with your MeetingPlace user name and password. See your administrator for more information.

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3. Enter the number of locations for the call. For example, if you are joining the call from Atlanta, two of your colleagues are calling in from Houston, and three more coworkers are calling in from Dublin, you would enter “3” in the “Number of locations” field. (You only need to count locations, not the number of people in each location.) A phone line is reserved for each location.

4. Click Options.

5. Enter information in any of the fields on the Telephone Conference Call Options dialog box. All fields are optional. If you do not enter a telephone conference call meeting ID, an ID is automatically assigned to the call. The available fields are explained below.

- **Telephone conference call meeting ID:** Enter a name or ID for your call. The ID cannot exceed nine characters. If you type letters into this field, they are converted to the equivalent numbers on a telephone. Do not use special characters such as asterisks. Participants must enter the meeting ID to attend the call.

- **Telephone conference call password:** For additional protection, you can assign a numeric password to the phone call. The password cannot exceed 17 digits. Be sure to remember the password; it will not be shown again.

  The telephone conference call password is separate from the meeting password. You can assign a meeting password on the Security tab of the New Meeting page. A meeting password protects the online meeting.

- **Billing code:** If your company uses billing codes to track telephone conference calls, enter the code here. Otherwise, leave this field blank.

- **Entry announcements:** You can select to hear a beep, a beep and the person's name, or no sound when someone enters the call. “Beep and name” is the default selection.

- **Departure announcements:** You can select to hear a beep, a beep and the person's name, or no sound when someone leaves the call. “Beep only” is the default selection.

- **Record this telephone conference call:** Select the check box next to “Record this telephone conference call” if you want to create an audio recording of the call. You can dial the telephone number for the meeting and enter the telephone conference meeting ID and, if required, the password, to hear the recorded call after the meeting has ended.
6. After entering options for the call, click OK to close the dialog box and return to the Tools tab. When you save your meeting, the telephone conference call will be created. View the meeting details for information about the call, such as the telephone number for the call.

---

**Using NetMeeting**

NetMeeting® is an online conferencing program that allows you to share files with screen sharing and to draw on a whiteboard. When scheduling an online meeting, you can use the Tools tab of the New Meeting page to select NetMeeting as a tool for your meeting. (You cannot use NetMeeting for an instant meeting.)

You can use NetMeeting in the following ways:

- You can use NetMeeting instead of Sametime for all meeting collaboration. You can attend the meeting from the Meeting Center. Once the meeting begins, you will use NetMeeting for all interactions. To use NetMeeting instead of Sametime for your meeting, select the “Use NetMeeting” check box.
  
  **Note** When you select the “Use NetMeeting” check box, everyone must use NetMeeting to attend the meeting.

- You can use NetMeeting to listen to audio and see video in a meeting. If you use NetMeeting to participate in the audio and video portion of a meeting, you cannot see any of the meeting content, such as a shared screen or a file on the whiteboard. NetMeeting users must use the audio conference ID on the Meeting Details page to attend the audio and video portion of a meeting.

**Unavailable Features**

When you select NetMeeting as a tool for your meeting:

- You cannot use the Sametime tools for your meeting. Everyone in the meeting must use NetMeeting to present and view information.

- You cannot have a meeting that is a “Moderated Presentation or Demo.” People using NetMeeting cannot participate in a meeting with a Moderator. When scheduling a NetMeeting meeting, do not select “Moderated Presentation or Demo” as the meeting type on the Essentials tab.

- You cannot encrypt the meeting to protect the meeting content.
Using NetMeeting for Audio and Video in a Sametime Meeting

You can use NetMeeting to listen to the audio and see the video in a Sametime meeting. If some people use NetMeeting for audio and video in a meeting:

- NetMeeting users must use the audio conference ID on the Meeting Details page to attend the audio and video portion of the meeting.
- Sametime users must use Automatic Microphone mode for Sametime audio. NetMeeting users cannot request the microphone if you use Request Microphone mode.
- If two people using audio speak at the same time, NetMeeting users will only hear the primary person who speaks. For example, if Bob is speaking and Maria interrupts him, NetMeeting users will only hear Bob; they will not hear Maria’s interruption.

Security: Protecting the Meeting

You can protect your meeting so that the information you share remains confidential. The right security options for your meeting depend on your purpose. For example, you might want to use a password to limit attendance to your meeting and use encryption to protect the meeting content. You can select multiple options on the Security tab of the New Meeting page to protect your meeting.

Choosing Security Options

The table below will help you choose the appropriate security options for your meeting.

<table>
<thead>
<tr>
<th>Type of Security</th>
<th>What Is Protected</th>
<th>Action Required to Attend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choosing Participants</td>
<td>• Meeting attendance</td>
<td>• Participants must log on to Sametime.</td>
</tr>
<tr>
<td></td>
<td>• Meeting information (details)</td>
<td></td>
</tr>
<tr>
<td>Meeting Password</td>
<td>• Meeting attendance</td>
<td>• Meeting creator must remember and distribute the password.</td>
</tr>
<tr>
<td></td>
<td>• Meeting information (details)</td>
<td>• Participants must enter the password.</td>
</tr>
<tr>
<td>Hiding the Meeting</td>
<td>• Meeting attendance</td>
<td>• Meeting creator must remember and distribute the meeting name.</td>
</tr>
<tr>
<td></td>
<td>• Meeting information (details)</td>
<td>• Participants must enter the meeting name.</td>
</tr>
<tr>
<td>Encryption</td>
<td>• Shared information during a meeting</td>
<td>• None.</td>
</tr>
</tbody>
</table>
Choosing Participants

When you choose participants for a meeting, only the people you choose can see the meeting listed in the Meeting Center. This is a good choice if you only want specific people to see information about the meeting and to attend the meeting. This option is particularly secure because everyone who attends the meeting must log on to Sametime with a user name and password.

Securing the Meeting with a Password

When choosing a password for your meeting, enter letters and numbers to ensure the highest level of security. Remember that the meeting password is separate from your Sametime password. The meeting password is also separate from the telephone conference call password. See “Passwords” for more information.

**Tip** You might want to use a short password (10 to 12 characters) so that you can remember it; you will not see the password again after you save the meeting. You must distribute the password to all meeting participants so that they can enter it to attend the meeting and view the meeting details. You must also enter the password before you can make any changes to the scheduled meeting.

Ensuring That the Meeting is Not Listed

Most meetings are listed in the Online Meeting Center. However, you can create an unlisted meeting that does not appear in the Meeting Center. To attend the meeting, participants must enter the meeting name.

If you do not want the meeting name to appear in the Meeting Center, select “Secure this meeting by not listing it in the Online Meeting Center.” Be sure to let the meeting participants know the name of the meeting before it begins.

**Tip** Be sure to remember the name of your unlisted meeting. To edit or attend the meeting, you must go to the Meeting Center, click Unlisted Meeting, and type the name of the meeting exactly as it appears on the Essentials tab.

Securing Meeting Information with Encryption

When you secure the meeting with encryption, all meeting information is scrambled, or encrypted, as it is passed among the meeting participants. If you do not use encryption, an unauthorized person can access the meeting information. For example, someone could read all of the chat text in your meeting if encryption is not used.
You should use encryption whenever you are extremely concerned about security. For example, you should use encryption if you are having a meeting that contains confidential material and participants are using the Internet to attend. However, you should be aware that using encryption slows down the meeting because scrambling the meeting information takes more time.

To use encryption in your meeting, select “Secure this meeting using encryption.”

If you are using NetMeeting in your meeting, you cannot protect the meeting with encryption.

**Tip** Encryption protects the information that is shared during the meeting, but it does not prevent anyone from attending the meeting. When you use encryption, you might also want to protect your meeting by making it unlisted, choosing participants for it, or giving it a password.

After making choices on the Security tab, click Save if you are finished scheduling your meeting. Otherwise, proceed to the appropriate tab to enter more information for the meeting.

**Caution** If there is not enough space on the server for your meeting, the meeting is not scheduled after you click Save. Return to the Essentials tab and choose a new time for the meeting.

---

### Choosing Participants for the Meeting

When you choose participants for a meeting, the meeting is restricted to those people; only they can see the meeting listed in the Meeting Center. This option is a good choice if you only want specific people to see information about the meeting and to attend the meeting. This option is particularly secure because everyone who attends the meeting must log on to Sametime with a user name and password.

**Note** Choosing participants for a meeting does not invite those people to the meeting. You must e-mail the participants for the meeting and let them know the meeting name and start time before anyone can attend the meeting.

To choose participants:

1. Click “Add or Remove People” on the Security tab of the New Meeting page in the Meeting Center.
2. If necessary, select a Directory in the Directory drop-down box. For example, you might want to make sure that your company’s Directory appears in the box.
Note: If there is only one choice in the Directory drop-down box, your organization only has one Directory available. See your system administrator for more information.

3. Enter a name or group in the “Search for person or group” field. You can enter a last name in the field, or you can enter a last name followed by a first name.

4. Click Search.

5. Select the appropriate name or group in the box.

Tip: Use the arrows to move through the list of names in the Directory.

6. (Optional) To see the names of people in a group, select the group and click Contents. View the members of the group in the Group Contents dialog box and click OK.

7. Do one of the following:
   - To choose the selected person or group as a meeting participant, click Add. The name is added to the “Restrict To” box on the right of the dialog box.
   - To remove the selected person or group from the list of meeting participants, click Remove. The name or group is removed from the “Restrict To” box on the right of the dialog box.

8. Repeat steps 2 - 7 until you have selected all participants for the meeting.

9. Click OK. The names of the participants appear in the “Restrict the meeting to the following people only” box on the Security tab.

Locations: Ensuring That Everyone Can Attend

Because Sametime allows people from all over the world to meet online, your meeting is likely to include people from many different locations. For example, someone might join your meeting from a home office in Dublin, while someone else joins from a corporate location in Atlanta. To ensure that everyone can attend your meeting, you must know who is attending and how they access Sametime.

If you do not know how people will attend your meeting, contact them before scheduling the meeting and ask the following questions:

- Are you attending from a distant location? If so, what is your location?
- Do you use a modem to access Sametime?
- Can you access my organization’s internal network (for example, the corporate intranet) from your location?
- Has your system administrator set up a server at your location?
After obtaining answers to the above questions, use the Locations tab to enter appropriate information for your meeting. Use the table below to determine how to complete the Locations tab when scheduling the meeting.

<table>
<thead>
<tr>
<th><strong>If any participants are</strong></th>
<th><strong>Then select</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Using a modem to access Sametime</td>
<td>The check box labeled “People are attending using a modem”&lt;br&gt;If you select this check box, the quality of the meeting might be affected. For example, video might not be as smooth as it is in a meeting without modem users.</td>
</tr>
</tbody>
</table>

| **Note** | The administrator determines whether this check box appears on the Locations tab. |

| Attending from another location, able to access your corporate network, and using a server that is different from the one you usually use<br>**For example:** Coworkers attending from a home office or a branch office or using a laptop while traveling | The check box labeled “People are attending from internal Sametime servers”<br>**Note** The administrator determines whether this check box appears on the Locations tab. |

| **Note** | The administrator determines whether this check box appears on the Locations tab. |

| Attending from another location and unable to access your corporate network<br>**For example:** A coworker at home who can access the Internet but cannot access your corporate intranet; a customer or business partner who can access the Internet | The check box labeled “People are attending from the Internet (outside the organization)”<br>**Note** The administrator determines whether this check box appears on the Locations tab. |

**Distributing the List of Sametime Servers**

If your meeting includes more than one server (for example, if you allow people to attend the meeting from multiple servers or if you choose specific servers to include in the meeting), you must distribute the list of servers to everyone who will attend the meeting. Participants should attend from the server nearest their location. Participants should contact their system administrator if they are not sure which server to use to attend the meeting.

**Note** After you save the meeting, the list of servers appears on the Meeting Details page. You can copy this list and paste it into an e-mail to send it to the meeting participants. Participants can click the server name to go to the appropriate server for the meeting.

**Caution** If there is not enough space on the server for your meeting, the meeting is not scheduled after you click Save. Return to the Essentials tab and choose a new time for the meeting.
Editing a Scheduled Meeting

The system administrator, the meeting creator, and the Moderator can edit (or change) the meeting details.

**Note** If more than one person has been the Moderator of a meeting, the most recent Moderator is the only Moderator who can edit or delete the meeting when it is finished.

Which details you can change depends on the meeting state:

- **Active:** You cannot edit the details for a meeting that is in progress (or active). During the meeting, you can change the duration of the meeting or end the meeting. See “Monitoring the Length of the Meeting.”

- **Scheduled:** You can change any of the details for a scheduled meeting.

- **Finished:** You can change most of the details for a finished meeting. (You cannot change the start time, duration, meeting type, tools, number of participants, or locations for the meeting.)

  **Note** You cannot change the encryption setting for most meetings. However, you can change the encryption setting if the meeting was recorded.

To edit a meeting:

1. Click the meeting name. The meeting details appear.

2. Click Edit Meeting. The appropriate meeting tabs appear. See “Creating a Scheduled Meeting” for information about each of the tabs.

   **Tip** To delete whiteboard attachments, scroll to the bottom of the page and select the “Delete file” check box next to the appropriate files. The files are deleted when you click Save in step 4.

3. Make any changes you want to the meeting information.

4. Click Save.

**Note** If you are editing a meeting that repeats, and you have not changed the date or time of the meeting, the Repeating Meeting dialog box appears. Select one of the options below, and then click OK to save your changes.

- Select “Just this meeting” to apply the changes you have made to this meeting only. None of the other meetings in the series are affected.

- Select “This meeting and all subsequent occurrences” to apply the changes you have made to this meeting and every future meeting in the series. For example, select this option if you chose to encrypt the meeting and you want every meeting in the series to be encrypted. All meetings in the series will reflect the change.
• Select “This meeting and all previous occurrences” to apply the changes you have made to this meeting and every previous meeting in the series. For example, select this option if you changed the meeting name and you want the meetings that have already occurred to have the same name.
• Select “All occurrences” to apply the changes you have made to all occurrences in the series of meetings.

Note The options for “This meeting and all previous occurrences” and “All occurrences” are only available if you are using the Enterprise Meeting Server (EMS). The EMS is not a part of Sametime 3.1. See your system administrator for more information.

5. If you are editing a meeting that repeats and you click Occurrences, the Repeat Rules dialog box appears. Select one of the options below, fill in any other necessary fields in the dialog box (just as you would when scheduling a repeating meeting), and click OK to save your changes.
• Select “Just this meeting” to change the date of the meeting you are currently editing only.
• Select “This meeting and all subsequent occurrences” to change the date for the current meeting and every future meeting in the series. For example, select this option if you want to reschedule every meeting in the series from 9 AM on Tuesdays to 10 AM on Wednesdays.

Note If you cannot choose “Just this meeting” or “This meeting and all subsequent occurrences,” you can only change the date for this particular occurrence of the meeting. Choose a new date for the meeting and click OK.

Note If you change the date or time of the meeting and a telephone conference call is associated with the meeting, the call is automatically rescheduled. If there is a problem rescheduling the telephone call, the meeting will not be rescheduled. When changing information about a telephone conference call, you must enter a MeetingPlace user name and password if they are required and if you did not create the meeting.

Deleting a Scheduled Meeting

If plans change and you must cancel a scheduled meeting, you can delete the meeting. Or, you might want to delete a finished meeting to reduce the number of meetings in the Finished Meetings list in the Meeting Center. After you delete a meeting, the meeting details, including any files that were attached for the whiteboard and any recordings of the meeting, are no longer available.
You can delete a scheduled or finished meeting if you created the meeting or if you are the Moderator of the meeting. (Meetings that are currently in progress cannot be deleted. However, you can end an active meeting and then delete it.) When you delete a meeting, its name no longer appears in the Meeting Center. If you have scheduled a telephone conference call for the meeting, the call is canceled.

**Note** If more than one person has been the Moderator of a meeting, the most recent Moderator is the only Moderator who can edit or delete the meeting when it is finished.

To delete a meeting, click the meeting name and then click Delete Meeting. If the meeting is not part of a series of repeating meetings, a confirmation dialog box appears. Click OK to confirm the deletion.

If the meeting is part of a series of repeating meetings, the Repeating Meeting dialog box appears after you click Delete Meeting. Select one of the options below, and then click OK to save your changes. (Active meetings are not deleted.)

- Select “Just this meeting” to delete this meeting only. All other meetings in the series will still be available in the Meeting Center.
- Select “This meeting and all subsequent occurrences” to delete this meeting and every future meeting in the series. Finished meetings that are a part of the series are still available. For example, if you select this option for a series of 30 repeating meetings and 10 of the meetings have already occurred, the 10 meetings that have occurred are still listed in the Finished view of the Meeting Center.
- Select “This meeting and all previous occurrences” to delete this meeting and every past meeting in the series. Future meetings that are a part of the series are still available. For example, if you select this option for a series of 30 repeating meetings and 10 of the meetings have not yet occurred, the 10 meetings that have not yet occurred are still listed in the Meeting Center.
- Select “All occurrences” to delete every meeting in the series, both past and future.

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**Accessing Meeting Details**

Meeting details include all of the information entered when the meeting was created. Details are available for all meetings. In a password-protected meeting, the password must be entered to see the meeting details. Only the creator or Moderator of a meeting can change the meeting details. See “Editing a Scheduled Meeting” for more information.
To view meeting details:

- If your Meeting Center includes a meeting details icon next to the meeting name, click the icon to view the details. You can also click the meeting name to view details.
- If you do not see a meeting details icon, click the meeting name to view the details for a scheduled or finished meeting.
- If you are attending a meeting, choose Meeting - Meeting Details.
- If the meeting is password-protected, you must enter the password before you can view the details.

**Note** Some meeting details (including information about a telephone conference call associated with the meeting) only appear on the server on which the meeting was created. See your system administrator for more information.

### What is on the Meeting Details Page
The Meeting Details page might include the following information:

- Whether or not the meeting is finished.
- If the meeting is finished, the Meeting Details page lists whether or not the meeting has been recorded. If the meeting has been recorded, click “Replay the Meeting” to view the recording.

#### Essentials
- **Meeting name:** Entered when the meeting was created.
- **Start time:** Date and time.
- **Duration:** Length of meeting in days, hours, and minutes.
- **Online meeting has password:** Yes or no. The meeting password itself is not displayed; you must remember the password when you create the meeting. If you are the creator or the Moderator of the meeting, be sure to distribute the password to the participants before the meeting begins. See “Passwords” for more information.
- **Status:** Scheduled, active (in progress), or finished.
- **Moderator:** Name of the Meeting Moderator.
- **Encrypted:** Yes or No. If the meeting is encrypted, all meeting content (such as shared information and chat text) is protected. See “Security: Protecting the Meeting” for more information.
- **Recorded:** Yes or No.
- **Expected participants:** The number of people who can attend the meeting. The meeting creator enters this number when scheduling the meeting.
Repeating
If it is a repeating meeting, information about the occurrences of the meeting is available. If the “Show all occurrences” link is available, click it to view a list of all occurrences for the meeting.

Locations
The Locations section includes a list of addresses for the locations, or servers, that people can use to attend the meeting. You can click on the links that are listed in this section to go to the meeting on the appropriate server.

Note To view a recorded meeting or see a complete list of meeting details, you might need to go to the server where the meeting was created. See your system administrator for more information.

If people from distant locations are attending the meeting, the addresses of the servers they should use to attend are listed. If you are the creator or the Moderator of the meeting, you can use this list to send the appropriate addresses to the meeting participants.

The following information might appear in the Locations section on the Meeting Details page:

- **Participants can attend from the following servers:** You can only attend the meeting from the server that is listed after this heading on the Meeting Details page.

- **Attend the meeting on your home server if it is listed below:** If the server that you usually use is listed, use that server to attend the meeting. See “Locations: Ensuring That Everyone Can Attend” for more information about servers.

- **Participants within the organization can attend from the following servers:** If you are attending an internal corporate meeting from a distant location and you are able to access your corporate network, find the server closest to you in this list and attend the meeting from that server. See “Locations: Ensuring That Everyone Can Attend” for more information about servers.

- **Participants on the Internet can attend from the following servers:** If you are attending an internal corporate meeting and you cannot access your corporate network, or if you are attending a meeting as a participant from another organization, find the server closest to you in this list and attend from that server. See “Locations: Ensuring That Everyone Can Attend” for more information about servers.

Tools
- Lists which tools are available for the meeting. If the meeting includes computer audio and video, ensure that your computer includes the required hardware and software.
• **NetMeeting audio conference ID**: Number to use when using NetMeeting to attend a meeting that includes NetMeeting audio and video and Sametime audio and video. See “Attending a Meeting with NetMeeting” for more information.

**Detailed Description**
The person who creates the meeting might enter a description of the meeting. The description might include any relevant information for the meeting, such as an agenda.

**Whiteboard Attachments**
Whiteboard attachments are files for display on the whiteboard. The three types of whiteboard files are:

- **Whiteboard Attachments**: Files that the meeting creator attached to the meeting. These files are in their original format or, if the files were attached using Print Capture, in FST format. For example, if you attach a Lotus Word Pro file named Proposal.lwp when creating the meeting, the file appears on the Meeting Details page as Proposal.lwp.

- **RTF Files**: Files that you can view in an appropriate program. If the Moderator makes changes to Proposal.lwp on the whiteboard during a meeting and then saves the file, the file appears as Proposal_Annotated.rtf on the Meeting Details page. If the Moderator saves a presentation that was created on the blank whiteboard, the filename is Whiteboard.rtf.

- **SWB Files**: Files that you can save to your computer and then attach to another meeting. If the Moderator makes changes to Proposal.lwp on the whiteboard during a meeting and then saves the file, the file appears as Proposal_Sametime.swb on the Meeting Details page. If the Moderator saves a presentation that was created on the blank whiteboard, the filename is Whiteboard_Sametime.swb.

**Participants**
After the meeting is finished, the administrator might choose to display the list of participants.
Working with Instant Meetings

You can start an instant meeting by right-clicking on an active (green) name in any part of Sametime (Sametime Connect, the Participant List of the Meeting Room, or a Sametime Discussion or TeamRoom) and selecting the appropriate meeting option from the shortcut menu. Instant meetings occur immediately; they are best for small groups of people who need to meet quickly. See the following topics for more information about working with instant meetings:

- “Checking Available Audio and Video Tools”
- “Starting an Instant Meeting”
- “Attending an Instant Meeting”
- “Customizing Your Instant Meeting Invitations”

Starting an Instant Meeting

You can start an instant meeting from any of the following locations:

- Sametime Connect
- The Participant List of an active meeting - You must have permission to edit/share before you can start an Audio, Video, Share, or Collaborate instant meeting from the Participant List. You do not need permission to start an instant chat meeting.
- A Sametime Discussion or TeamRoom - You can start only an instant chat meeting from a Discussion or TeamRoom.

To quickly and easily start an instant meeting, select one or more people, right-click, and choose the appropriate option from the shortcut menu. When you start an instant meeting, you are automatically the Moderator, and by default all participants have all permissions to interact.

Starting an Instant Meeting from Sametime Connect

To start an instant meeting from Sametime Connect:

1. Select one or more green names in the list.
2. Right-click on the name and choose one of the options listed below. Each option includes default tools. For example, an audio meeting includes computer audio. You can add or remove tools before sending the meeting invitation. See step 4 for more information about tools.

- **Chat**: Exchange text messages.
- **Audio**: Communicate using computer audio.
- **Video**: Communicate using computer audio and video.
• **Share:** Present information using the whiteboard or screen sharing.

• **Collaborate:** Use all of the available Sametime tools.

**Tip** You can also select the above options from the Meeting menu or click the appropriate meeting icon. You can start a chat meeting with one other person, double-click that person's name.

**Note** When you are using audio and video in a meeting and you start an instant audio/video meeting, your voice is heard in both meetings. Mute your microphone in the original meeting so that you are only heard in the second meeting.

3. If you are starting a chat meeting with one other person, you can enter text in the Send Message dialog box and send the message immediately. Go to step 6. If you are starting a chat meeting with more than one other person, or if you are starting a different kind of instant meeting, the Start Instant Meeting dialog box appears.

4. Enter the appropriate information in the Start Instant Meeting dialog box:

   • The Topic - You can leave the default topic or change it.
   
   • The invitation message - You can leave the default message or change it.
   
   • The list of invitees - To add people to the list of invitees, click Add Invitees. Enter a user name in the "Add to Invitation" dialog box. You can enter a first name, last name, or both first and last names. (If more than one person has the name you enter, a list appears and you can choose the appropriate name.) To find a person's name in your company's directory, click Directory. (See "Searching for Names in the Directory" for more information.)

**Tip** If you are using Sametime Connect for the desktop, you can add names to the list by dragging and dropping a user name or group from the contact list to the invitees list.

   • Tools - To add a tool to your meeting, click the check box next to the tool so that a check mark appears. To remove a tool, click the appropriate check box to remove the check mark. (Before including audio and video tools, check the available audio and video tools of the people you want to invite.)
• Security - Select the "Secure meeting” option to ensure that your meeting is encrypted. Encryption ensures that no one outside your meeting can read your messages. You can only use encryption in a meeting if everyone is using Sametime Connect version 1.5 or higher. If a user of an earlier version of Sametime (version 1.0 and earlier) participates in the conversation, the messages will not be encrypted. Messages to and from AOL Instant Messenger users are not encrypted. If security is not an issue, you do not need to select this option.

5. Click Send. An invitation is sent to the appropriate people; they can respond to the invitation by sending you a private message, joining the meeting, or closing the invitation dialog box.

Note You cannot invite someone whose status is "Offline" or "Do Not Disturb Me” to an instant meeting. You also cannot invite AOL Instant Messenger users to a meeting.

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Starting an Instant Meeting from the Participant List of an Active Meeting

Before you start an instant meeting from the Participant List, you should be aware of the following information:

• When you start an instant meeting from an active meeting, the original meeting remains open in a browser window on your computer, and you are still a participant in that meeting. To return to the original meeting, select the browser window that contains the active meeting.

• If both the original meeting and the instant meeting that you are starting include computer audio, everyone in both meetings can hear you when you speak. To prevent people in the original meeting from hearing you, either leave that meeting or mute your microphone and your speakers in that meeting.

• When the instant meeting begins, it does not contain any information (such as a chat transcript or a whiteboard file) from the original meeting.

To start the instant meeting:

1. Select your name in the Participant List and read the tooltip to ensure that you have permission to edit/share. If necessary, you can ask the Moderator for permission.

   Note You do not need permission to edit/share to start an instant chat meeting.

2. Select one or more green names in the Participant List.
3. Right-click on the name and choose an option:

- **New Chat**: Exchange text messages.
- **New Audio Meeting**: Communicate using computer audio.
- **New Video Meeting**: Communicate using computer audio and video.
- **New Sharing Meeting**: Present information using the whiteboard or screen sharing. You can also view Web sites and participate in polls.
- **New Collaboration Meeting**: Use all of the available Sametime tools.

**Tip** You can also select an option from the Meeting - People menu. To start an instant chat meeting with one other person, double-click that person's name.

4. If you are starting a chat meeting with one other person, you can enter text in the Send Message dialog box and send the message immediately. If you are starting a chat meeting with more than one other person, or if you are starting another kind of instant meeting, the “Invite to a Meeting” dialog box appears.

5. Enter the appropriate information in the “Invite to a Meeting” dialog box. You can change the following information:

- **The topic**
- **The message**
- **The list of invitees** - To add people to the list of Invitees, click Add Invitees. Enter a user name in the “Add to Invitation” dialog box. You can enter a first name, last name, or both first and last names. (If more than one person has the name you enter, a list appears and you can choose the appropriate name.) To find a person's name in your company's Directory, click Directory. (See “Searching for Names in the Directory” for more information.)
- **Tools**. To add a tool to your meeting, select the check box next to the tool so that a check mark appears. To remove a tool, clear the appropriate check box. Before including audio and video tools, check the available audio and video tools of the people you want to invite.
- **Security**. Make sure the “Secure meeting” option is selected if you want the meeting to be encrypted. If security is not an issue, you do not need to select this option.

6. Click Send. An invitation is sent to the appropriate people; they can respond to the invitation by sending you a private message, joining the meeting, or closing the invitation dialog box.

**Note** You cannot invite someone whose status is “Offline” or “Do Not Disturb Me” to a meeting. You also cannot invite AOL Instant Messenger users to a meeting.
Starting an Instant Meeting from a Discussion or TeamRoom

You can start an instant chat meeting from a Discussion or TeamRoom. You cannot start any other kind of instant meeting in a Discussion or TeamRoom. For more information, see “Chatting with Others”.

Checking Available Audio and Video Tools

If you want to include computer audio and video in an instant meeting, you should verify that the people you are inviting to the meeting have the required audio and video tools on their computers. You can use this information to decide which kind of instant meeting is most appropriate.

The tools are:

- **Microphone**: To speak during meetings, participants must have a microphone.
- **Speakers**: To hear other people speak during meetings, participants must have speakers.
- **Video Camera**: Participants without cameras can see the video images of other participants, but they cannot send their own video images.

To check the available tools:

1. Select a name or names in the contact list or the Participant List of an active meeting.
2. Do one of the following:
   - In Sametime Connect, choose Meeting - Available A/V Tools or right-click and choose the Available Tools option from the shortcut menu.
   - In the Meeting Room (during an active meeting), choose Meeting - People - Participants’ A/V Tools.
3. The list of available tools appears:
   - A check mark under a tool icon indicates that the participant has that tool.
   - An “X” under a tool icon indicates that the participant does not have that tool.

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• A question mark under a tool icon indicates either that the participant is using a version of Sametime that does not support audio and video, or that the participant has not entered information about his or her audio/video tools. (If a participant does not have audio/video tools, he or she can still participate in an audio/video meeting. The participant will see shared information in the meeting but will not see video or hear audio.)

4. Click Close to close the Available Tools dialog box.

**Tip** You can also view available audio/video tools for invitees in the dialog box that appears when you start a meeting and in the dialog box that appears when you are inviting others to a meeting in progress.
Participants contribute to meetings in several ways. For example, one participant might present a file on the whiteboard and allow another person to edit the file with the whiteboard tools. Participants can also respond to polls, invite others to join the meeting, and contribute to the conversation through chat or computer audio.

**Note** There are fewer options available for participants in broadcast meetings and chats. See “Participating in a Broadcast Meeting” and “Chatting with People” for more information.

**Attending a Meeting**

The way you attend a meeting depends on the type of meeting and the available options for the meeting. You can:

- **Attend a Scheduled Meeting**: You can attend a scheduled meeting from the Sametime Meeting Center. Some scheduled meetings include options that change the way you attend the meeting. For example, you might attend a telephone conference call associated with the meeting, or you might attend the meeting using NetMeeting.

- **Attend an Instant Meeting**: You can attend an instant meeting when you start the meeting or when you respond to an invitation.

**Viewing and Attending a Scheduled Meeting (without Search)**

You can use the Meeting Center to view and attend meetings. For example, you might need to attend a meeting that is currently in progress, edit the details for a meeting that occurs in the future, or view a recorded meeting. See the procedures below for more information.

**Note** If your system administrator has installed the Enterprise Meeting Server (EMS), you can use the Meeting Center to search for meetings before attending them. The EMS is a separate feature; it is not part of Sametime 3.0. See your system administrator for more information.
Attending from the Correct Sametime Server

When a meeting includes people from many different locations, it is often available on more than one Sametime server. If the meeting you want to attend is on more than one Sametime server, the Meeting Moderator or meeting creator will send you an e-mail with a list of available servers. (A Sametime server is represented as an address, such as http://www.yoursametimeserver.com.) Use this list to determine which Sametime server is best for your location and attend from that server. For example, you might need to attend from a server that:

- Is closest to you
- Allows you to connect as quickly as possible
- Has been set aside for your department’s or organization’s use

If you are unsure which server you should use to attend, contact your system administrator. See “Locations: Ensuring That Everyone Can Attend” for more information.

Attending a Meeting

1. If required, log on to Sametime. If you are the Moderator or if you might become the Moderator during the meeting, you must log on to Sametime before attending the meeting.

2. Find the meeting name in one of the views of the Meeting Center:

   - **Active**: Meetings that are currently in progress
   - **Scheduled**: Meetings that are scheduled for a future date and time
   - **Finished**: Meetings that are completed
   - **Today**: Meetings for the current day
   - **Unlisted Meeting**: Meetings that are not listed in the Meeting Center. If your meeting is unlisted, follow the “Attending an Unlisted Meeting” procedure below to attend the meeting.
   - **All Meetings**: All of the meetings that are listed in the Meeting Center
   - **My Meetings**: Meetings that you created
   - **Recorded**: Meetings that have been recorded. To view a recorded meeting, click the meeting name. The Meeting Details page appears. Click “Replay the Meeting” to view the meeting.
   - **Calendar**: Meetings by date

3. Click the meeting name. (If the meeting is scheduled to begin at a later date and time or if it has already occurred, enter the password if one is required. The meeting details appear.)
Note If you are attending your first Sametime meeting, you need to download the Meeting Room before attending.

4. If you are prompted to choose how your name will appear in the Participant List, enter a name. You can enter a first name or a first and last name. You do not have to enter your Sametime user name. Click OK.

Note Entering a name does not log you on to Sametime.

5. If required, enter the meeting password. Click OK. The Meeting Room appears.

6. If the meeting includes a telephone conference call, remember to attend the conference call.

Attending an Unlisted Meeting

1. If required, log on to Sametime. If you are the Moderator or the person who created the meeting, you must log on to Sametime before attending the meeting.

2. In the Meeting Center, click Unlisted Meeting.

3. Enter the meeting name that you obtained from the Moderator. Click OK.

4. If the meeting is scheduled to begin at a later date and time, or if it has already occurred, enter the password if one is required. The meeting details appear.

Note If you are attending your first Sametime meeting, you need to download the Meeting Room before attending.

5. If you are prompted to choose how your name will appear in the Participant List, enter a name. You can enter a first name or a first and last name. You do not have to enter your Sametime user name. Click OK.

Note Entering a name does not log you on to Sametime.

6. If required, enter the meeting password. Click OK. The Meeting Room appears.

7. If the meeting includes a telephone conference call, remember to attend the conference call.

You might see more than one unlisted meeting with the same name. (For example, repeating meetings create several meetings with the same name.) If there is only one active unlisted meeting with the name you entered, you will be prompted to join that meeting. If there are several active unlisted meetings, use the date, time, and Moderator's name to determine which meeting to attend.
Special Options for Scheduled Meetings

Some scheduled meetings include options that change the way you attend the meeting. The following options might be available for your meeting:

Attending a telephone conference call associated with the meeting
Using the telephone to attend the audio portion of an audio/video meeting
Attending a meeting with NetMeeting

Attending a Telephone Conference Call

If you are attending a meeting that includes a Latitude MeetingPlace™ telephone conference call, information about the call appears in the bottom right corner of the Meeting Room. (If you are in a broadcast meeting, the call information appears only on the Meeting Details page. Choose Meeting - Meeting Details to see the call information.)

Note You can use Sametime to schedule a telephone conference call only if your Sametime server includes this capability. See your system administrator for more information.

You can attend the call by having MeetingPlace call you or by dialing into the conference call.

Have MeetingPlace Call You

1. Click the Join Call button in the top right corner of the Meeting Room.
2. Enter your telephone number in the “Join Telephone Conference Call” dialog box. (If there is no field to enter your telephone number, you must dial into the conference call. See the procedure below for more information.)
3. Click OK. MeetingPlace calls you using the number you provided.
4. Pick up the telephone when it rings. You are automatically in the meeting when you answer the telephone.
5. If your telephone does not ring, or if you get disconnected, you can dial into the telephone call using the information listed in the Meeting Room and in the meeting details.

Note If you are in a broadcast meeting, the button for attending the telephone call is not available. You must use the call information on the Meeting Details page to dial into the telephone call.
Dial into the Telephone Call

If you click the Join Call button and there is no field to enter your telephone number, you can dial into the telephone call.

1. Dial the telephone number listed in the Meeting Room.
2. Enter the MeetingPlace Meeting ID and, if required, a password to join the call. The Meeting ID and password are listed in the Meeting Room and in the meeting details.

Note The system administrator determines how you can attend telephone conference calls. If you experience problems attending the conference call, contact your administrator.

Using the Telephone to Attend the Audio Portion of a Sametime Audio/Video Meeting

In some situations, you might need to use the telephone to participate in the audio portion of a Sametime audio/video meeting. For example, you might not have the required hardware and software to use computer audio and video, or you might be away from your computer. Use the procedure below to dial into the audio portion of a Sametime meeting, whether you are participating in the online portion of the meeting or just listening and speaking as though you were in a telephone call.

Note You cannot use this procedure unless your system administrator has enabled Sametime to allow telephone users and computer audio users to communicate in the same meeting. (The administrator must set up an H.323 Gateway and Gatekeeper.) You must contact your system administrator for meeting information before you can dial into the meeting.

Dialing into the Audio Portion of a Sametime Audio/Video Meeting

1. Before the meeting begins, contact your system administrator and obtain the following:
   - The telephone number for the meeting.
   - A prefix number to enter after dialing the phone number to access the meeting. You will use this number as a prefix for the audio conference ID mentioned in step 2.
2. View the meeting details in the Sametime Meeting Center and write down the audio conference ID number. To view the meeting details, click the meeting name in the Sametime Meeting Center. You will use the audio conference ID (along with the prefix you obtained in step 1) to access the audio portion of the meeting.
3. If you plan to attend the online portion of the meeting (to use the whiteboard, screen sharing, and Meeting Room chat), go to the Meeting Center when the meeting is scheduled to begin and click the meeting name. The Meeting Room appears and you can participate in the online portion of the meeting.

4. To listen to the audio portion of the meeting, use the telephone to dial the telephone number that you obtained in step 1.

5. When you hear the dial tone, enter the prefix that you obtained in step 1 followed by the ID that you obtained in step 2.

6. You can now speak and listen to the other people in the meeting. While you are in the call, you will only be able to hear one person at a time. For example, if Bob is speaking and Etienne briefly interrupts him, you will not hear Etienne’s interruption.

**Note** Dialing into the audio portion of a Sametime meeting is separate from attending a telephone conference call using Latitude MeetingPlace.

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### Attending a Meeting with NetMeeting

NetMeeting® is an online conferencing program that allows you to share files with screen sharing and to draw on a whiteboard. When scheduling a meeting in the Sametime Meeting Center, you can select NetMeeting as a tool for the meeting.

You can use NetMeeting in the following ways:

- You can use NetMeeting instead of Sametime for all meeting collaboration. You can attend the meeting from the Sametime Meeting Center. Once the meeting begins, you can use NetMeeting for all interactions.

- You can use NetMeeting to listen to the audio and see the video in a Sametime meeting. If you use NetMeeting to participate in the audio and video portion of a Sametime meeting, you cannot see any of the Sametime meeting content, such as a shared screen or a file on the whiteboard.

### Attending a Meeting That Uses NetMeeting for Collaboration

To attend a meeting that uses NetMeeting instead of Sametime for all meeting collaboration:

1. Click “Attend a Meeting” on the “Welcome to Sametime” page.

2. Click the meeting name. A new browser window appears.
3. Click the button to start NetMeeting. NetMeeting launches, and you can use the screen-sharing and whiteboard tools to interact with the other participants.

**Note** You must have NetMeeting 3.01 on your computer to attend a NetMeeting meeting.

**Using Netscape Communicator to Attend**
If you use Netscape Communicator to attend a NetMeeting meeting, you must download and install the “Sametime Plug-in for NetMeeting Meetings Using a Netscape Browser.” You can download the plug-in from the Download page or when you attend the meeting.

To download the plug-in when you attend a meeting:

1. Click “Attend a Meeting” on the “Welcome to Sametime” page.
2. Click the meeting name. A new browser window appears, and then a dialog box appears.
3. Click the link to get the plug-in.
4. Click the link to download and install the plug-in.
5. If you see the security warning dialog box, select the “Remember this decision” check box and then click Grant.
6. Click Install. The plug-in is installed, and you can return to the Meeting Center to attend the meeting.

**Using NetMeeting for Audio and Video in a Sametime Meeting**

You can use NetMeeting to listen to the audio and see the video in a Sametime meeting. If you use NetMeeting to participate in the audio and video portion of a Sametime meeting, you cannot see any of the Sametime meeting content, such as a shared screen or a file on the whiteboard.

**Attend Using NetMeeting**
To use NetMeeting to attend a meeting that includes Sametime users:

1. Before the meeting begins, view the meeting details and write down the audio conference ID number. To view the details, click the meeting name in the Sametime Meeting Center.
2. Start NetMeeting. (You must have NetMeeting 3.01 on your computer to attend.)
3. Choose Tools - Options, and click the Advanced Calling button.
4. Select the “Use a gateway to call telephones and videoconferencing systems” check box.
5. Enter the name of your Sametime server in the Gateway field. The name of the Sametime server is identical to the address that you used to access the Sametime Welcome page. (For example, www.yourSametimeserver.com.) Contact your system administrator if you do not know the name of your Sametime server.

   **Note** You do not need to enter the http:// at the beginning of the server name.

6. Click OK in the Advanced Calling Options dialog box, and then click OK in the Options dialog box.

7. Click the Call button.

8. Enter the audio conference ID from step 1 in the To field.

9. Select “Phone number” in the Using drop-down box.

10. Click Call to join the meeting.

**Using Sametime in a Meeting with NetMeeting Users**
To use Sametime to attend a meeting that includes NetMeeting users, click the meeting name in the Meeting Center. The Sametime Meeting Room appears.

During the meeting:

- Use Automatic Microphone mode for Sametime audio. NetMeeting users cannot request the microphone if you use Request Microphone mode.
- Try not to interrupt the person who is speaking. If you speak while someone else is speaking, NetMeeting users will hear only the first person who spoke.

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**Attending an Instant Meeting**

Instant meetings are created when a person clicks on an active (green) name in any part of Sametime (Sametime Connect, the Participant List of the Meeting Room, or a Sametime Discussion or TeamRoom). The person who creates the instant meeting is the initial Moderator. (During the meeting, the Moderator can choose another Moderator.) When you attend an instant meeting, you and all participants (including the Moderator) have all permissions. However, the Moderator can revoke and grant permissions during the meeting.

You can attend an instant meeting by:

- Starting an instant meeting
- Responding to a meeting invitation to attend an instant meeting already in progress

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Observing a Meeting

During a Sametime meeting, you can view:

- A presentation, such as a shared screen or whiteboard file
- Meeting information, such as who else is in the meeting and which files are available for the meeting.
- Web pages that the Moderator sends.
- Poll responses that the Moderator shares.

**Note** There are fewer options available for participants in broadcast meetings and instant chat meetings. See “Participating in a Broadcast Meeting” and “Chatting with People” for more information.

Viewing a Presentation

As a participant in a Sametime meeting, you can watch others present information on the whiteboard or via screen sharing, or you can become a presenter. When you view a shared screen, you see the initials of the participant who is controlling the screen displayed beside the cursor in the shared screen. If another participant is sharing a file, you might edit the file.

**Note** You must have permission to edit/share before you can edit a file.

Switching between the Whiteboard and Screen Sharing

In a meeting with both the whiteboard and screen sharing, any participant with permission to edit/share can see the buttons for both screen sharing and the whiteboard and can switch between the tools. If one participant switches the tools, all participants see the change. Do not switch the tools unless you want all meeting participants to switch with you.

Follow these steps to switch between the tools:

1. Choose Tools - “Switch to Whiteboard” or Tools - “Switch to Screen Sharing.” (Or you can click the Whiteboard or Screen Sharing buttons.)
2. A message informs you that all participants in the meeting will switch with you so that they can see what you share. If you are ready to switch to the other tool, click Yes.

Viewing Meeting Information

Use the Sametime menus and features to obtain information about meetings.
Meeting Details

Meeting details include information about the meeting, such as the time of the meeting and attachments for the meeting. To view meeting details:

- If your Meeting Center includes a meeting details icon, click the icon to view the meeting details. You can view the details for a meeting that is in progress, scheduled for the future, or finished. (You can also click the meeting name to view the details.)

- If your Meeting Center does not include a meeting details icon, click the meeting name to see the details for a scheduled or finished meeting. If you are in an active meeting, choose Meeting - Meeting Details.

Available Audio and Video Tools

You can see participants’ audio and video hardware by selecting names in the Participant List, and then choosing Meeting - People - Participants’ A/V Tools.

Identifying Participants in the Meeting

The Participant List displays information about participants and helps you identify their roles. Names in the Participant List are sorted alphabetically by default. To sort the names according to any of the categories below, click the icon at the top of the column for the category. To return the names in the Participant List to alphabetical order, click Name at the top of the column.

You might see the following icons next to participants’ names:

- **Hand Raise:** A hand icon appears next to the names of participants who click the hand-raise button.

- **The Current Speaker:** During a meeting that includes computer audio, the “currently talking” icon appears next to the name of the current speaker.

- **Who Has Requested the Microphone:** During a meeting that includes the Request Microphone mode of computer audio, “waiting to talk” icons appear next to the names of participants who have requested the microphone.
**Participant List Details**

Click the Participant List details button in the bottom right corner of the Participant List to view more information about meeting participants. Names in the Participant List details are sorted alphabetically by default. To sort the names according to any of the categories below, click the icon at the top of the column for the category. To return the names in the Participant List details to alphabetical order, click Name at the top of the column.

- **Permission to Edit/Share and Permission to Speak:** Check marks indicate which participants have permissions. Only the Moderator sees the check marks; other participants cannot see the permissions columns of the Participant List details.

- **The Moderator:** The Moderator icon appears next to the Moderator's name.

- **Who is Sharing:** The sharing icon indicates which participant is sharing a screen.

- **Who is Controlling the Shared Screen:** The arrow icon indicates the participant who currently controls the shared screen.

**Web Pages Sent**

To see the most recent Web page that the Moderator has sent to meeting participants, click the Web Pages tab and click Go.

**Tallied Poll Responses**

If the Moderator shares the tallied poll responses, you can see them in the Poll Tab. Click the arrow next to the “Questions asked” drop-down list, and then select a question from the list. The responses appear.

**Permissions**

To see which permissions you or other participants have, move your mouse pointer over a name in the Participant List and read the tooltip. See “Viewing Your Permissions” for more information.
Status Bar

The status bar at the bottom of the Meeting Room displays messages and information about the meeting, such as the elapsed time of the meeting, the number of participants, and the number of hands raised. If you see a locked padlock icon on the status bar, the meeting content has been secured with encryption. If the padlock icon is unlocked, the meeting has not been secured with encryption.

Tip You can determine whether the status bar displays the elapsed meeting time or the remaining meeting time. Choose View - Elapsed Meeting Time or View - Remaining Meeting Time.

Status Details

The Status Details dialog box contains information about the meeting, including:

- **Basic status information**: For example, if the meeting is being recorded.
- **Information about technical problems and solutions**: For example, if your computer video is not working, the Status Details dialog box lists possible causes for the problem.
- **Information about your Sametime connection**: When you attend a regular or test meeting, the Meeting Room attempts to connect to the Sametime server. Information about this connection attempt is displayed in the Status Details dialog box. If the connection is successful, the status details include information about how you connected to the server. (For example, you might see a message that you connected through a proxy server.) If the connection fails and you cannot attend a meeting, save the status details and send them to your system administrator.

You can view the Status Details dialog box when you are attending a meeting or testing a meeting. After viewing the details, you can save them on your computer and then send them to your system administrator for help with technical issues.

To view and save the status details:

1. Do one of the following:
   - If you are testing a meeting and you receive an error, click the status details button in the error message dialog box. (The button might have an “i” for information, an “!” for a warning, or an “X” for an alert.)
   - If you are attending a Sametime meeting, click the status details button. (The button might have an “i” for information, an “!” for a warning, or an “X” for an alert.) When the status details appear, click the icon on the left to see the full text of the details.
2. To solve a technical issue, find the issue in the Status Details dialog box and implement the suggested solution. If you have an audio/video problem, you might need to change your audio/video preferences by clicking the audio/video preferences button beside the audio controls or in the video window.

3. If you cannot solve the issue on your own, click the Save As button in the Status Details dialog box and save the details on your computer. You can save the details to any location on your computer; you might want to put them in the My Documents folder or in a folder that you use often. The default location is the same default directory for saving Meeting Room chat transcripts. The status details are saved as a text file, with the default name of Status Messages<meeting name><date>.txt (For example, Status Messages SalesMeetingAug5,2002.txt.)

4. Send an e-mail to your system administrator describing the issue and attach the details to the e-mail. For example, if you cannot connect to the Sametime server, mention that you have connection problems in the e-mail and then attach the status details that you saved on your computer in step 3.

Note During broadcast meetings, only presenters can view the status details.

Audio/Video Preferences

You can view and change your audio and video preferences for the Meeting Room by clicking the preferences buttons beside the audio controls and in the video window. During broadcast meetings, only presenters can view and edit their audio/video preferences.

Viewing Web Pages

When the Moderator sends a Web page, a new browser window automatically appears on your computer screen. Only you can control this window. You can explore the Web page, go to a different Web page, or close the window without affecting what other participants see in the meeting.

If the Moderator sends more than one Web page, each page replaces the previous page within the single browser window on your screen. You do not receive multiple browser windows.

Note If you attend a meeting late (or leave a meeting and then rejoin it) and the Moderator has sent a Web page, the Web page appears on your screen.
Tip To view the most recently sent Web page, click the Web Pages tab and click Go. (If the Web Pages tab is not visible, choose View - Interaction Tabs - Web Page Tab.) The Web page appears in a browser window on your screen. No one else can see this window.

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Viewing Poll Responses Shared by the Moderator

Initially, the Moderator is the only person who can see the poll responses. If the Moderator shares the tallied poll responses with the meeting participants, you can view the responses by selecting the appropriate question from the “Questions asked” drop-down list on the Poll Tab. (You cannot see individual participants’ responses unless you become the Moderator.)

Note If the Poll tab is not visible, choose View - Interaction Tabs - Poll Tab.

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Participating in a Meeting

You can participate in a meeting by:

- **Using permissions**: You must have permission to edit/share to edit files or to start instant meetings from the Participant List, and you must have permission to speak before you can speak during an audio/video meeting.

- **Editing files**: You can edit a file that another participant is sharing, or you can use the whiteboard tools to edit a file on the whiteboard.

- **Responding to a poll**: A poll is a question that the Moderator asks everyone in the meeting. You respond to the poll to answer the question.

- **Raising your hand**: You can raise your hand to get the Moderator’s attention when you have something to say.

- **Transferring a file to another participant**: Immediately transfer a file to anyone in the Participant List of a meeting, a chat meeting, or your contact list.

- **Inviting others to join the meeting**: For example, if the Moderator asks a question about a project that you are working on with a coworker, you can invite the coworker to the meeting.

- **Responding to an invitation**: If you are invited to a meeting, you can respond to the invitation privately, join the meeting, or decline the invitation.

- **Sending a chat message or speaking during the meeting**
• **Saving the chat from the meeting:** You can save the chat transcript from the meeting to a directory on your computer.

**Note** There are fewer options available for participants in broadcast meetings and instant chat meetings. See “Participating in a Broadcast Meeting” and “Chatting with People” for more information.

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**Using Permissions**

The two permissions in Sametime are permission to edit/share and permission to speak. The permissions that are available at the beginning of a meeting depend on the meeting type (Collaboration, Moderated Presentation or Demo, or Broadcast Presentation or Demo). However, the Moderator can grant and revoke permissions during the meeting. For example, in a broadcast meeting, only the Moderator has permissions at the beginning of the meeting, but the Moderator can grant permissions to presenters. (The audience does not have permissions.) In a Collaboration meeting, all participants have permissions at the beginning, but the Moderator can revoke permissions during the meeting.

**Permission to Edit/Share**

The Moderator must give you permission to edit/share before you can present information during a meeting. Permission to edit/share allows you to:

- **Draw on the whiteboard:** Use the whiteboard tools to present a file or draw on the whiteboard.
- **Share your screen:** Share your screen or a computer program.
- **Control a shared screen:** Control a screen or computer program that someone else is sharing. (Before you can control the shared screen, the person who is sharing the screen must allow others to control the screen.)
- **Start instant meetings:** Select people from the Participant List and start instant meetings with them.

**Note** The administrator determines what permission to edit/share allows you to do. For example, the administrator can disable the ability to control the screen or use a whiteboard.

**Permission to Speak**

You need permission to speak before you can speak or transmit video during a meeting that includes computer audio and video.
Note  The administrator determines whether Sametime includes permission to speak. For example, the administrator might not include audio and video in your version of Sametime.

Viewing Your Permissions and Other Participants’ Permissions

After you attend a meeting, you can see which permissions you or others have by moving your mouse pointer over a name in the Participant List and looking at the tooltip. Possible messages are:

- I am the Meeting Moderator: The participant is currently the Meeting Moderator.
- I have all permissions: The participant has all available permissions.
- I have no permissions: The Moderator has not given the participant any permissions.
- I have permission to edit/share: The participant has permission to draw on the whiteboard, start instant meetings, share a screen, or control the shared screen.
- I have permission to speak: The participant has permission to use audio and video during the meeting.

Asking for Permissions

You can ask for permissions by:

- Sending a private chat message to the Moderator: Double-click the Moderator’s name in the Participant List. When the floating window appears, enter your request in the text-entry area and click Send. The message appears in a private floating window on the Moderator’s screen.
- Sending a message with Meeting Room Chat: See Communicating with Meeting Room Chat for more information.

Tip  Before sending a message to the Moderator, you might want to raise your hand to get the Moderator’s attention.

Editing Files

During a Sametime online meeting, you can use screen sharing or the whiteboard to edit files. Although both tools help you share and present information, they have significantly different purposes. See “Presenting Information in a Meeting” to choose the best tool for your purposes.

Using Screen Sharing to Edit Files

To use screen sharing to edit your file, open the file in the appropriate program on your computer. Use the “Share a Program” method of screen
sharing to share the file with other meeting participants. You can allow other participants to control the program and edit the file. Participants must have permission to edit/share before they can control the shared program. See “Presenting Information with Screen Sharing” for more information.

**Using the Whiteboard to Edit Files**

To use the whiteboard to edit your file, attach the file when scheduling the meeting in the Meeting Center. The Moderator can also attach the file during the meeting. You cannot attach whiteboard files to instant meetings. After attaching the file and saving the scheduled meeting, attend the meeting and select the file in the drop-down box at the top of the whiteboard. All participants who have permission to edit/share can use the whiteboard tools to edit the file. See “Presenting Information with the Whiteboard” for more information.

When you attach a file to the whiteboard, the file is converted to a suitable format for whiteboard display. When you edit the file, you make changes to the file in its new format but not in its original format. For example, if you attach a Lotus 1-2-3 file to the whiteboard, you cannot edit and save the changes in Lotus 1-2-3 format. You can, however, edit the file and save the changes as an attachment to the meeting details. (See “Saving Meeting Information”.) If you need to save your edits in the original file format, use screen sharing to edit the file.

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**Responding to Polls**

During a meeting, the Moderator can send polls to gather information from the meeting participants. For example, the Moderator might ask participants to choose which job candidate to hire. You respond to polls by completing the “Respond to Poll” dialog box that appears on your screen.

Only the Moderator sees your answers to poll questions. If anonymous responses are allowed, the Moderator sees your answers but cannot see your name.

To respond to a poll:

1. Select or enter your answer(s) to the poll question in the “Respond to Poll” dialog box. (Click Cancel if you do not want to respond to the poll. You are counted as “Did not participate in poll” in the tallied poll responses.)

   **Tip** If the Moderator specifies anonymous responses to the poll, a “Respond to Poll Anonymously” dialog box appears on your screen. When poll responses are anonymous, your name does not appear when the Moderator views the individual responses.
2. Click OK. The responses are immediately updated to include your answers.

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**Raising Your Hand**

At any time during a meeting, you can “raise your hand” to get the Moderator’s or presenter’s attention. You might want to raise your hand if:

- You need to ask for permission to edit/share or permission to speak.
- You want to respond to a question or speak during the meeting. You can raise your hand to signal to the Moderator or presenter that you have something to say.
- You want to acknowledge your presence in the meeting. You can raise your hand to let the Moderator or presenter know that you are ready for the meeting to begin.

The Moderator can lower your hand after you have raised it, or you can lower your own hand. Other participants (including a presenter who is not the Moderator) cannot lower your hand.

**Note** You do not need to have permission to raise your hand.

To raise your hand, click the raise hand button at the bottom of the Participant List or choose Tools - Raise Hand. (You can also right-click on your name in the Participant List and choose Raise Hand from the shortcut menu that appears.) The raise hand button changes to a lower hand button, and a hand icon appears next to your name. Everyone in the meeting can see the hand icon.

To lower your hand, click the lower-hand button at the bottom of the Participant List, or choose Tools - Raise Hand to remove the check mark. (You can also right-click on your name in the Participant List and choose Lower Hand from the shortcut menu that appears.) The hand icon next to your name in the Participant List disappears.

**Sorting by Raised Hands**

You can sort the names in the Participant List by the order in which participants have raised their hands. Sorting by raised hands is helpful if the
meeting has so many participants that the Participant List cannot display all of their names at once.

To sort by raised hands, click the hand icon at the top of the Participant List. The name at the top of the list is the first person who raised a hand. To return the Participant List to alphabetical order, click Name at the top of the list.

**Tip** You can see how many people in the meeting have raised their hands by looking at the hand icon in the status bar at the bottom of the Meeting Room.

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**Transferring a File**

Sametime 3.0 allows you to immediately transfer a file to another meeting participant. For example, if Maria and Etienne are discussing a document during a chat meeting, Maria can select Etienne's name in her contact list and send the document to him. You must transfer one file at a time, and you must transfer the file to one person at a time. File transfers are automatically encrypted to secure your information.

**Tip** To protect yourself from computer viruses that might be spread through file transfers, use current anti-virus software. Make sure that the software’s real-time protection settings are enabled and set to scan all files.

You can transfer a file to anyone in:

- **The Participant List of a meeting.**
- **Your contact list.** You can transfer files to people with Active or Away status. If you transfer a file to someone with Away status, the transfer does not begin until the person returns to the computer and accepts the transfer. You cannot transfer files to external users or to AOL Instant Messenger users.
- **A chat meeting.**

**Note** You cannot transfer a file to AOL Instant Messenger users or external users.

To transfer a file:

1. Do one of the following:

   - **Instant Chat Meeting:** If you are chatting with only one other person, choose Meeting - Send File. If you are chatting with two or more people, select a name from the Participant List and choose Meeting - People - Send File, or right-click the selected name and choose Send File from the shortcut menu.
• **Instant or Scheduled Meeting:** Select a name from the Participant List or the Participant List details, and choose Meeting - People - Send File. You can also select a name, right-click, and choose Send File from the shortcut menu.

• **Contact List:** You can transfer a file to a person who appears in your contact list even if you are not in a meeting with that person. Select a name and choose Meeting - Send File, or right-click the selected name and choose Send File from the shortcut menu.

2. The Send File dialog box appears. Type the full path and name of the file, or click Browse to select the file. You can transfer only one file at a time.

**Note**  Your system administrator determines the maximum file size allowed for file transfers. This size limit appears beneath the “File to Send” field.

3. (Optional) Type a description of the file.

4. Click Send.

5. The File Transfer Status dialog box appears:

   • If the recipient accepts the file transfer, a status bar tracks the transfer process. You can select the check box to automatically close the dialog box once the transfer is complete.

   • If the recipient declines the transfer, a message appears on your screen.

6. Click Close if you did not select the check box to automatically close the dialog box in step 5.

**Tip**  You can stop a file transfer that is in progress by clicking Cancel. For example, you might want to cancel a file transfer that is taking too long.

### Accepting a File Transfer

When other people transfer files to you, a Receive File dialog box appears on your screen. Follow these steps to accept the file transfer:

1. The default location for transferred files is the C:\Program Files\Lotus\Sametime Client\Transferred files directory. If you want to save the file in a different folder, click Browse and select a different location. You can change the name of the file by typing a new name in the “File name” field. Click Save.

2. Click Accept.

3. The File Transfer Status dialog box appears. If you want to close this dialog box automatically after the transfer is complete, select the appropriate check box.
4. If you do not automatically close the dialog box in step 3, you can do either of the following once the transfer is complete:
   - Click Open to open the file.
   - Click Close to close the dialog box without opening the file.

   **Tip** You can stop a file transfer that is in progress by clicking Cancel. For example, you might want to cancel a file transfer that is taking too long.

**Declining or Cancelling a File Transfer**
To decline a file transfer, click Decline when the Receive File dialog box appears. The person who sent the file receives a message indicating that you declined the file transfer.

To cancel a file transfer that is already in progress, click Cancel at any time. For example, you might want to cancel a file transfer that is taking too long.

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**Inviting Others to a Meeting**
You might want to invite others to a Sametime meeting after the meeting has started. To receive your invitation, the people you are inviting must be online in a program that includes Sametime features, such as Sametime Connect, a Sametime meeting, a Discussion, or a TeamRoom. You can invite others to an instant meeting or to a scheduled meeting.

   **Note** You can invite someone to a meeting that has been restricted to specific participants. If you invite someone to a restricted meeting and that person was not specified as a participant during meeting creation, the invitee must click Join on the meeting invitation dialog box to join the meeting. The invitee cannot attend the meeting from the Meeting Center. If you are unsure if the meeting is restricted, check with the Moderator before inviting others.

To invite others to a meeting:

1. During the meeting, choose Meeting - Invite Others. (If you are inviting others to a chat meeting, you can click the Invite Others button.) An invitation dialog box appears.
2. (Optional) Edit the text in the Message box if necessary.
3. Click Add Invitees.
Tip If you are using Sametime Connect for the desktop and you are inviting someone to a meeting that you started in Sametime Connect, you can drag a name from the contact list and drop it into the Invitees box.

4. In the “Add to Invitation” dialog box, do one of the following:
   • Type the name of the person you want to invite. Click Add, and then click Close.
   • Click Directory to search for a name or group in the public Directory. See “Searching for Names in the Directory” for more information.

Tip If your meeting includes audio and video, ensure that the people you are inviting have audio/video tools. See “Checking Available Audio and Video Tools” for more information.

5. Click Send. The invitation is sent to the appropriate people. They can respond to the invitation by sending you a private message, joining the meeting, or closing the invitation dialog box. (If the person you are inviting closes the invitation dialog box, you are not notified.)

Note You cannot invite AOL Instant Messenger users or external users to the meeting.

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**Responding to a Meeting Invitation**

Others can invite you to a scheduled or instant Sametime meeting. If you are invited to a meeting, you can respond in the following ways:

- To respond privately by starting an instant chat meeting with the person sending the invitation, click Respond. The invitation remains on your screen, and you can join the meeting at any time.
- To accept the invitation, click Join.
- To decline and close the invitation, click Close.

Note If you are invited to a restricted meeting and you were not specified as a meeting participant during meeting creation, you must click Join on the meeting invitation dialog box to join the meeting. You cannot attend the meeting by clicking the meeting name in the Meeting Center.

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**Configuring Sametime**

During a meeting, you can configure Sametime by:

- Adding the name of a meeting participant to your contact list.
• Arranging the Meeting Room to suit your needs. For example, you can hide the Participant List so that it is no longer visible to you. (Others in the meeting still see the Participant List.)

**Note** There are fewer options available for participants in broadcast meetings and instant chat meetings. See “Participating in a Broadcast Meeting” and “Chatting with People” for more information.

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**Adding a Participant Name to the Contact List**

During a meeting, you can add any name from the Participant List to the contact list.

To add a participant to the contact list:

1. Select the participant’s name in the Participant List of the Meeting Room.
   - **Tip** To add more than one participant at a time, press CTRL and select the names in the Participant List.

2. Choose Meeting - People - Add to Connect List.

3. In the Add New User dialog box, select or type a group name.

4. Click Add. The name is added to your contact list and appears in the group you specified in step 3.

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**Tips for Arranging the Meeting Room**

Use the following tips to arrange the Meeting Room to suit your needs.

**Screen Sharing, Floating Video, and the Meeting Room**

When you are sharing your screen or a program, you are usually working in the shared screen or program, and you can no longer see the Meeting Room. Use the information below to make sure that you can see video, the Participant List, the audio controls, and the Interaction Tabs while you are sharing:

• To see video while sharing your screen, float the video windows. When the video windows are floating, you can place them next to the screen or program that you are sharing on your computer.

  - **Tip** Remember that if you are sharing your entire screen, everyone in the meeting will see your video windows when you float them.
• If you want to see the entire Meeting Room while sharing your screen, resize your browser window by using the buttons in the top right corner of the browser. You can also put your mouse pointer at the bottom right corner to resize window (the mouse pointer becomes a double arrow). When you resize the browser, you can make more or less of the Meeting Room visible, and then place your browser next to the shared program so that you can see both at once.

• Use the tips below to reduce the size of the Meeting Room, or to make only certain elements visible. For example, if you are not using the Participant List, you can hide the Participant List column so that it is no longer visible.
  • Drag the splitter (the black bars that appear when you move your mouse pointer over the top of the Interaction Tabs) to make the tabs larger or smaller.
  • Expand or hide the Interaction Tabs by clicking the black arrows on the splitter.
  • Show or hide the right hand column (video, Participant List, and audio) by choosing View - Participant List Column - Entire Column to turn the check mark on or off.
  • Show or hide the Interaction Tabs by choosing View - Interaction Tabs - All Tabs to turn the check mark on or off.

**Viewing or Hiding Meeting Room Components**

• **Participant List:** If the Participant List column is not visible, choose View - Participant List Column - Entire Column to turn on the check mark. The Participant List column appears on the right side of the Meeting Room. (This menu item is not available for most participants in a broadcast meeting. If you are an audience member in a broadcast meeting, you cannot view the Participant List.)

• **Interaction Tabs:** The Interaction Tabs are Meeting Room Chat, Polling, and Web Pages. These tabs appear at the bottom of the Sametime Meeting Room. If a tab is not visible, use the View - Interaction Tabs menu items to turn on the check mark next to the appropriate tabs. For example, choose View - Interaction Tabs - Poll Tab to view the Poll tab.

• **Audio and Video:** If the audio controls are not visible, choose View - Participant List Column - Audio Controls to turn on the check mark. If the video windows are not visible, choose View - Participant List Column - Video Windows to turn on the check mark.

• **Toolbars:** If the screen-sharing toolbar is not visible, choose View - Toolbar to turn on the check mark. If the whiteboard tools are not visible, choose View - Whiteboard Tools to turn on the check mark.
Returning the Meeting Room to the Original Layout

If you have changed the layout, you can return the Meeting Room to its original layout whenever you want. Click View - Default Layout.

Making the Shared Area Full Screen

You can maximize the shared area to see a larger view of the shared information. When the shared area is maximized, it covers the entire screen.

To make the shared area a full screen, choose View - Make Shared Area Full Screen, or click Make Shared Area Full Screen on the toolbar.

**Note** This button is most useful when you are sharing a whiteboard file or viewing information shared by another participant. If you are sharing your own screen, this button has no effect.

**Undo**

To return to the original Meeting Room layout, click Undo Full Screen on the floating toolbar.

Fitting the Shared Area to the Window

To see all of the meeting content without scrolling, you can fit the shared area to the window.

**Fitting the Shared Area**

Choose View - “Fit Shared Area to Window,” or click “Fit Shared Area to Window” on the toolbar.

A check mark appears next to the “Fit Shared Area to Window” item. The image on the whiteboard or the shared screen is sized to fit into the shared area.

**Note** This button is most useful when you are sharing a whiteboard file or viewing information shared by another participant. If you are sharing your own screen, this button has no effect.

**Returning to Original Size**

To return the image to its original size, choose View - “Fit Shared Area to Window” to remove the check mark, or click the “Fit Shared Area to Window” button again. The image on the whiteboard or the shared screen returns to its original size.
Participating in a Broadcast Meeting

In a broadcast meeting, most participants are audience members who cannot contribute to the meeting. A few presenters conduct the meeting and interact during the meeting while the audience members watch and listen.

Audience Members

When you are an audience member in a broadcast meeting, you can watch and listen to the presentation, but you cannot interact during the meeting.

Available Features for an Audience Member

Broadcast meetings are useful when a very large number of people need to attend the meeting, but do not need to present or interact during the meeting. For example, a broadcast meeting is usually the best choice for a company-wide meeting with hundreds of attendees. The features listed below are available to anyone who attends a broadcast meeting.

As an audience member, you can:

- **View the presentation.** You can view the following information during a meeting:
  - A shared screen or program
  - A whiteboard presentation
  - Poll questions: You cannot send poll questions or respond to them, but you can view the questions, and, if the Moderator allows, you can also view the results. To view a poll, click the Poll tab and then select the appropriate question from the “Questions asked” drop-down box. If results are available, they appear underneath the question. (To make polls appear in their own dialog box automatically, choose View - “Display Web Pages and Polls in New Window.”)

**Tip** If you select the “Display Web Pages and Polls in New Window” menu item, poll questions sent by the Moderator appear in their own window. Poll questions that you select on the Poll tab do not appear in their own window.

- **Web pages:** You cannot send Web pages, but you can view the pages that the Presenters send. To view Web pages, click the Web Pages tab, select the appropriate page from the “Web page” drop-down box, and click Go. The Web page appears in its own browser window. (To make Web pages appear in their own browser window automatically, choose View - “Display Web Pages and Polls in New Window.”)
Tip If you select the “Display Web Pages and Polls in New Window” menu item, Web pages sent by the Moderator appear in their own window. Web pages that you select on the Web Pages tab do not appear in their own window.

- Chat text: Click the Chat tab to read the text that the Presenters enter. Although you can read the text, you cannot enter text. However, you can select, copy, and save the chat text.

Note If you attend a broadcast meeting late or leave the meeting and then rejoin it, you will not receive any chat text, Web pages, or polls that you missed.

Tip The Interaction tabs flash briefly to alert you to new content, such as shared poll responses or chat messages.

- Watch the video and listen to the audio.
  
  Note If the meeting includes a telephone conference call, you must use the Meeting Details page to attend the call and listen to the audio in the meeting.

- Control the volume of the meeting audio. To increase the volume, move the slider bar farther to the right. You can also choose Tools - Increase Speaker Volume or Tools - Decrease Speaker Volume. Continue selecting either of these menu items to increase or decrease the speaker volume in small increments.

- Mute your speakers. Choose Tools - Mute My Speaker, or select the check box in front of the speaker icon.

- Pause the video so that you can no longer see it. Choose Tools - Pause Remote Video (a check mark appears), or click the Stop button. Other participants will still see the video.

- Play the video. Choose Tools - Pause Remote Video to remove the check mark, or you can click the play button.

- Float the video windows. To view Sametime video in a separate browser window, you can “float” the video windows to separate them from the Meeting Room. To float the video windows, click the Float Video Windows button or choose View - Float Video Windows. When the video windows are floating, you can move them anywhere on your computer screen. To return the video windows to the Meeting Room, click the Float Video Windows button again or choose View - Float Video Windows to remove the check mark.
• **View the meeting details.** Choose Meeting - Meeting Details to see information about the meeting, such as the duration of the meeting and the files attached for the meeting. You cannot see the participants in the meeting.

• **Change the Meeting Room layout.** Use the View menu to arrange the Meeting Room to suit your needs. You can view or hide the audio/video column, the Interaction Tabs (for chat, send Web pages, and Polls), and the audio controls. You can also fit the shared area to the window, make the shared area occupy the full screen, and return the Meeting Room to the default layout.

• **Display Web pages and polls in new windows.** Choose View - “Display Web Pages and Polls in New Windows” to display new questions in a separate dialog box and new Web pages in a separate browser window. If you are already viewing a Web page or question in a new window, the window switches to display the new content. For example, if you are viewing a Web page in its own browser window and the Moderator sends a new Web page, your browser window automatically switches to the new Web page.

  **Note** Tallied poll responses are not displayed in a separate window. You must view responses on the Poll tab.

• **View status messages in the status bar of the Meeting Room.** The status bar includes important information about the meeting. For example, you can view the status bar to determine whether you have missed any meeting information or whether there is new content in one of the Interaction Tabs (such as a new Web page in the Web pages tab).

• **Choose Meeting - Leave Meeting to exit the meeting.**

**Unavailable Features for a Broadcast Meeting**

Because audience members in a broadcast meeting only need to watch and listen, some Sametime features are unavailable for audience members.

As an audience member, you cannot:

• Send and respond to polls.
• Send Web pages.
• Raise your hand.
• Draw on the whiteboard.
• Share and control screens.
• Transmit audio and video.
• Enter text in Meeting Room chat.
• Edit files.
• Switch between the whiteboard and screen sharing.
• Ask for permission to edit/share.
• See the whiteboard Pointer Tool.
• See the initials of the person controlling the screen.

Presenters
The creator of a broadcast meeting chooses presenters for the meeting. The Moderator is automatically a presenter. The Moderator grants permissions to the other presenters so that they can draw on the whiteboard, share or control a screen, start instant meetings, and use computer audio and video. Only presenters can interact during the meeting. For example, presenters can respond to polls, raise their hands, and view Web pages.

Loss of Information
During a broadcast meeting, you might notice any of the conditions listed below. Unfortunately, these conditions are a normal part of broadcast meetings.

• The audio might cut out for a couple of seconds, so that you do not hear what someone in the meeting says. (If the audio cuts out for more than a couple of seconds, you might be experiencing audio difficulties.)
• The video might pause for up to 15 seconds, so that you do not see a new image or you do not see the person who is currently speaking move. If the video pauses for longer than 15 seconds, you might be experiencing video difficulties.
• The whiteboard or screen-sharing presentation might appear to pause so that you do not receive any new information. This situation can last up to 45 seconds; after that time, you will begin receiving information again. If you do not receive information for longer than 45 seconds, try pausing the video. When you pause the video, you free up network bandwidth so that you can receive more meeting information from the server.
• You might not receive 100 percent of the chat text, sent Web pages, or polls in a meeting.

Tip The status bar displays messages about lost information. If you lose some chat text, the chat area in the Meeting Room includes a message about the lost text.
Using Microsoft Outlook to Schedule and Attend Sametime Meetings

If your system administrator allows it, you can use Outlook® 2000 to schedule, edit, delete, and attend Sametime meetings. When you schedule Sametime meetings with Outlook, Outlook automatically sends e-mail invitations to all meeting participants. Participants attend Sametime meetings by clicking the meeting address provided in the invitation.

**Note** You must create and modify Sametime meetings via Outlook 2000. Changes made through the Sametime Meeting Center are not reflected in your Outlook calendar.

**Caution** Before you can schedule or attend a Sametime meeting from Outlook, your system administrator must enable Outlook for Microsoft Conferencing. See your system administrator for information.

**Scheduling a Sametime Meeting**

To schedule a Sametime meeting using Outlook, follow the steps for creating any new meeting in Outlook. While creating the meeting, follow these guidelines:

- You must use Outlook 2000 or Outlook 2002 to schedule a Sametime meeting through Outlook.

- You might see more than one Sametime resource for the meeting. For example, there might be one resource for Collaboration meetings and another resource for Broadcast meetings. Contact your system administrator for information about the properties of each resource. For more information about the Sametime meeting types and meeting tools, see “Essentials: What You Must Do” and “Tools: How to Get Your Work Done.”

- The person who schedules the meeting automatically becomes the Meeting Moderator when the meeting begins.

- The meeting name that you enter in Outlook appears as the meeting name in the Sametime Meeting Center.

- If you do not allow external attendees, the meeting will be unlisted, and will not appear in the Sametime Meeting Center. Only the people who are invited to the meeting can attend the meeting.

- If you enter a password for the meeting, participants must enter the password before they can attend the meeting.

  **Note** If you choose not to allow external attendees, you cannot set a password for the meeting.

- Participants will receive reminder e-mails about the meeting. They can click the URL provided in the reminder to attend the meeting.
• To attach a file to the meeting, open your file management system (such as Windows Explorer) and select the file you want to attach. Drag the file and drop it into the meeting invitation. The file is attached to the Sametime meeting and e-mailed to each meeting participant when you send the meeting invitation.

• Outlook automatically sends an e-mail invitation to each person who is invited to the meeting. When participants accept the invitation, the meeting appears in their Outlook calendars. If a meeting request cannot be accommodated (for example, if too many meetings are scheduled at once on the same server), meeting participants are notified via e-mail and the meeting must be rescheduled.

• If an error occurs when Outlook tries to schedule the meeting, the meeting creator receives an e-mail stating that the meeting was not scheduled.

• If you schedule a Sametime meeting through Outlook, you cannot use NetMeeting as a tool in the meeting. For more information about using NetMeeting in Sametime meetings, see “Using NetMeeting.”

Modifying Meeting Details
To modify the details of a Sametime meeting that was scheduled through Outlook, click the meeting name in the Outlook calendar and change any details. When you are finished, Outlook e-mails the new meeting information to all meeting participants.

**Note** Only the person who created the meeting (the Moderator) can modify the meeting details.

The meeting details include:

• The start and end time of the meeting
• The meeting name
• The meeting type (The CTP resource determines the meeting type)
• The available tools (The CTP resource determines the available tools)
• Invited meeting participants
• Password
• Whether the meeting is listed or unlisted in the Sametime Meeting Center

**Tip** To extend a meeting that is in progress, click the “Extend Time” link on the left side of the Sametime Meeting Room. If you extend the meeting by using the menus in the Sametime Meeting Room, the change does not appear in Outlook.
Deleting a Sametime Meeting

To delete (or cancel) a Sametime meeting from Outlook, select the meeting name in the Outlook calendar and follow the usual procedure for deleting a meeting. When you are finished, Outlook automatically e-mails a cancellation notice to all meeting participants.

Note When deleting the meeting, you must choose to notify all participants of the deletion. Otherwise, the Sametime meeting will not be deleted from the Sametime server.

Note Only the person who created the meeting (the Moderator) can delete it.

Attending a Sametime Meeting

To attend a Sametime meeting from Outlook:

1. Click the meeting URL provided in the meeting invitation or the meeting reminder. The Sametime Meeting Details page appears in a new browser window. If the meeting has already started, the Sametime Meeting Room automatically launches in another browser window.

2. If prompted to log on to Sametime, enter your Sametime user name and password and click OK.

3. If prompted for a meeting password, enter the meeting password and click OK. (The meeting invitation includes the password.)

4. If prompted for the meeting name, enter the meeting name and click OK. (The meeting invitation includes the meeting name.)

Using Lotus Notes to Schedule and Attend Sametime Meetings

If your system administrator allows it, you can use IBM Lotus Notes® to schedule, edit, delete, and attend Sametime meetings. When you schedule Sametime meetings with Lotus Notes, Lotus Notes automatically sends e-mail invitations to all meeting participants. Participants attend Sametime meetings by clicking the meeting URL provided in the invitation.

Note You must create and modify Sametime meetings via Lotus Notes. Changes made through the Sametime Meeting Center are not reflected in your Lotus Notes calendar.

Scheduling a Sametime Meeting

To schedule a Sametime meeting using Lotus Notes, follow the steps for creating any new meeting in Lotus Notes. While creating the meeting, follow these guidelines:
• If you are experiencing problems scheduling or attending a meeting through Lotus Notes, see your system administrator. The administrator might need to create a Sametime user name and password for you.

• You cannot choose which tools you will use in your Sametime meeting. The system administrator determines the tools for your meeting.

• Use the attachments field to include any files that you want to present on the Sametime whiteboard.

  **Note**  Sametime Print Capture is not available for Sametime meetings that are scheduled through Lotus Notes.

• The person who schedules the meeting automatically becomes the Meeting Moderator when the meeting begins.

• The meeting name that you enter in Lotus Notes is the name of the Sametime meeting.

• Meetings that are scheduled through Lotus Notes are unlisted meetings in the Sametime Meeting Center.

• If you enter a password for the meeting, participants must enter the password before they can attend the meeting.

• Lotus Notes automatically sends an e-mail invitation to each person who is invited to the meeting. When participants accept the invitation, the meeting appears in their Lotus Notes calendars. If a meeting request cannot be accommodated (for example, if too many meetings are scheduled at once on the same server), meeting participants are notified via e-mail and the meeting must be rescheduled.

• If an error occurs when Lotus Notes tries to schedule the meeting, the meeting creator receives an e-mail stating that the meeting was not scheduled.

• If you schedule a Sametime meeting through Lotus Notes, you cannot use NetMeeting as a tool in the meeting. For more information about using NetMeeting in Sametime meetings, see “Using NetMeeting.”

**Modifying Meeting Details**

To modify the details of a Sametime meeting that was scheduled through Lotus Notes, click the meeting name in the Lotus Notes calendar and change any details. When you are finished, Lotus Notes e-mails the new meeting information to you.

**Tip**  Remember to e-mail the new meeting information to the meeting participants.

**Note**  Only the person who created the meeting (the Moderator) can modify the meeting details.
Deleting a Sametime Meeting

To delete or cancel a Sametime meeting from Lotus Notes, select the meeting name in the Lotus Notes calendar and follow the usual procedure for deleting a meeting.

Note Only the person who created the meeting (the Moderator) can delete it.

Attending a Sametime Meeting

To attend a Sametime meeting from Lotus Notes:

1. Click the meeting URL provided in the meeting invitation or the meeting reminder. The Sametime Meeting Details page appears in a new browser window. The Sametime Meeting Room automatically launches in another browser window.

2. If prompted to log on to Sametime, enter your Sametime user name and password and click OK.

3. If prompted for a meeting password, enter the meeting password and click OK. (The meeting invitation includes the password.)

4. If prompted for the meeting name, enter the meeting name and click OK. (The meeting invitation includes the meeting name.)
Chapter 6: Presenting Information in a Meeting

Any meeting participant who has permission to edit/share can use either screen sharing or the whiteboard to present information during a meeting. Although both tools help you share and present information, they have significantly different purposes. Use this table to help you determine the best tool for your purpose.

<table>
<thead>
<tr>
<th>Use screen sharing if...</th>
<th>Use the whiteboard if...</th>
</tr>
</thead>
<tbody>
<tr>
<td>You need to demonstrate a process or procedure in a program.</td>
<td>You want to annotate or highlight the content of your presentation.</td>
</tr>
<tr>
<td>You want to save the shared file in the original file format.</td>
<td>You want to save the shared file as an attachment to the meeting details.</td>
</tr>
<tr>
<td>You want to allow others to make changes directly to your presentation using the mouse and keyboard.</td>
<td>You do not want others to edit your original document.</td>
</tr>
<tr>
<td>You want to be sure that no one can see your presentation before the meeting begins.</td>
<td>You want to be sure that people can review your presentation before the meeting begins.</td>
</tr>
<tr>
<td>You want to share animated graphics during your presentation.</td>
<td>You have a lot of information that you need to discuss in a short period of time.</td>
</tr>
<tr>
<td>You have a fast computer or you are using only one or two programs.</td>
<td>You have a slow computer or you have many programs open at once.</td>
</tr>
</tbody>
</table>

Presenting Information with the Whiteboard

You can use the whiteboard to present an attached file or to create a presentation with the whiteboard tools. Use the whiteboard when:

- You have a lot of information that you want to discuss in a short period of time.
- You have a slow computer or you have many programs open at once.
- You want to annotate or highlight the content of your presentation.
- You do not want others to edit your original document.
- You want to be sure that people can review your presentation before the meeting begins.
• You want to save the shared file as an attachment to the meeting details. Whether you are presenting a file that you have prepared in advance or drawing on the blank whiteboard to create your own presentation, you can use the whiteboard tools to draw shapes, enter text, and customize your presentation.

Tip While you are presenting information on the whiteboard, you can change how you view the information. For example, you can make all of the information fit on the whiteboard at once, or you can make the information occupy all of the space on your computer screen. See “Fitting the Shared Area to the Window” and “Making the Shared Area Full Screen” for more information.

Permission to Edit/Share

Before you can use the whiteboard to give a presentation, you must have permission to edit/share. To make sure that you have permission, move the mouse pointer over your name in the Participant List and look at the tooltip. See “Viewing Your Permissions” for more information. You might need to ask the Moderator to give you permission to edit/share.

Note Your company might use any of the following products to write on a physical whiteboard and then save that information as an electronic file:

• SMART Interactive Whiteboard
• mimio
• eBeam

If you use any of these products, launch that product's desktop software and then use screen sharing to present the electronic file to everyone in the meeting.

Presenting an Attached File

You can use the whiteboard to present an attached file. You can attach the file while scheduling the meeting. The Moderator can also attach a file during the meeting. (Before you attach a file to a meeting, you must prepare the file.) To present the file on the whiteboard, make sure that the file is selected in the first drop-down box above the whiteboard.
Switching Pages in the File

To switch pages within the file, use the back arrow and the forward arrow on the whiteboard toolbar. You can also move through the pages in the file by using the second drop-down box above the whiteboard.

Tip When moving forward or back several pages in a file (for example, from page 3 to page 10), use the drop-down box rather than the forward and back arrows. Using the drop-down box ensures that your pages are presented as quickly as possible.

Emphasizing Important Information

You can draw on the whiteboard to emphasize important information in your presentation. For example, you can draw a circle around an illustration, or you can underline a particular word in red. You can also use the Pointer Tool to point to an item on the whiteboard. When you draw something or enter text on the whiteboard, everyone in the meeting can see it.

The table below describes how you can use the whiteboard tools to emphasize important information.

<table>
<thead>
<tr>
<th><strong>Action</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Pointing</td>
<td>Use the Pointer Tool to emphasize an important item.</td>
</tr>
<tr>
<td>Underlining</td>
<td>Use the Line Tool or the Pen Tool to underline information in your presentation. You can also choose a color and a width for your line.</td>
</tr>
<tr>
<td>Drawing a Circle</td>
<td>Use the Oval Tool or the Pen Tool to draw a circle around an item in your presentation.</td>
</tr>
<tr>
<td>Drawing a Rectangle</td>
<td>Use the Rectangle Tool to place a box around information in your presentation.</td>
</tr>
<tr>
<td>Entering Text</td>
<td>Use the Text Tool to enter text on the whiteboard. For example, you can enter a label for an illustration or describe a process.</td>
</tr>
</tbody>
</table>

For more information about the whiteboard tools, see “Drawing on the Whiteboard” and “Entering Text.”

Customizing Your Presentation

After you have drawn shapes and lines and entered text in your presentation, you can customize the appearance or change the location of the shapes and text on the whiteboard. For example, you can change the color of text, lines, and shapes on the whiteboard, or you can move a shape you have drawn to another location.

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**Saving the File**

If you want to save the changes to your file, ask the Moderator to save the file. (Only the Moderator can save a whiteboard file.) Meeting participants can view the changed file on the Meeting Details page.

**Note** Saving a whiteboard file does not change the original version of the file. After the Moderator saves the file, two versions of the file are available on the Meeting Details page (the original version of the file and the changed version of the file). The original version of the file retains the original file extension; the new version of the file will have an SWB or an RTF extension. See the “Whiteboard Attachments” section of the topic “Accessing Meeting Details” for more information.

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**Creating a Presentation with the Whiteboard Tools**

You can draw on the blank whiteboard to give a presentation during the meeting. You can also turn your presentation into a brainstorming session by allowing others to draw on the whiteboard. To use the blank whiteboard, select the word “Whiteboard” in the first drop-down box at the top of the whiteboard.

The table below presents ideas for creating a presentation on the whiteboard. You can use the whiteboard tools to create anything you can create with a piece of paper and a pen.

**Note** If the whiteboard tools are not visible, choose View - Whiteboard Tools to turn on the check mark and display the tools.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating illustrations</td>
<td>Draw on the whiteboard to illustrate a point or demonstrate a process. For example, you can sketch a product design or the posters for an advertising campaign.</td>
</tr>
<tr>
<td>Creating charts, graphs, and diagrams</td>
<td>Draw shapes and lines on the whiteboard and put them together to create charts, graphs, or diagrams. For example, you can represent sales percentages by drawing a series of rectangles or using the Line Tool to create a line graph.</td>
</tr>
<tr>
<td>Entering text or numbers</td>
<td>Use the Text Tool to enter text or numbers on the whiteboard. For example, you can enter a label for an illustration or a percentage for a graph that you have created.</td>
</tr>
</tbody>
</table>

For more information about the whiteboard tools, see “Drawing on the Whiteboard” and “Entering Text.”

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Customizing Your Presentation

After you have drawn shapes and lines and entered text in your presentation, you can customize the appearance or change the location of the shapes and text on the whiteboard. For example, you can change the color of text, lines, and shapes on the whiteboard, or you can move a shape to another location.

Saving the File

If you want to save your whiteboard presentation, ask the Moderator to save the file. (Only the Moderator can save a whiteboard file.) Meeting participants can view the file on the Meeting Details page.

Note Saving a whiteboard file does not change the original version of the file.

Drawing on the Whiteboard

You can draw on the blank whiteboard or on an attached file. If you are presenting a file that you have attached to the whiteboard, you can use the whiteboard tools to emphasize important information. For example, you can underline a sentence or circle a significant number in a sales presentation.

If you are presenting information on a blank whiteboard, you can use the whiteboard tools to create illustrations, charts, or diagrams. You can also use the whiteboard as a shared place to write ideas and sketch designs.

Note If the whiteboard tools are not visible, choose View - Whiteboard Tools to turn on the check mark and display the tools.

Permission to Edit/Share

You must have permission to edit/share before you can draw on the whiteboard. If you need to draw on the whiteboard but you do not have permission to edit/share, you can ask for permission.

Drawing Straight Lines

When you are presenting a file, you can draw a line to underline important information. You can also use lines and arrows to create sketches on the blank whiteboard. If you want to draw the line in a specific color or at a certain width, you can choose the color and the width before or after drawing the line.
1. To draw a straight line or an arrow, click the Line Tool or Arrow Tool and position the pointer where you want to draw the line.

2. Click the mouse button and drag to draw the line. Release the mouse button when the line reaches the desired size. (If you use the Arrow Tool, the line ends with an arrow head.)

**Drawing Rectangles and Squares**

You can draw rectangles and squares to place a box around important information when presenting a file. You can also use rectangles and squares to build charts or diagrams on the blank whiteboard. If you want to draw the shape in a specific color or at a certain width, you can choose the color and the width before or after drawing the shape.

1. To draw a rectangle or square, click the Rectangle Tool and position the pointer where you want to draw the shape.

2. Click the mouse button and drag to draw the shape. Release the mouse button when the shape reaches the desired size.

**Drawing Ovals and Circles**

Using the Oval Tool, you can circle important information during a presentation or create circles and ovals on the whiteboard. If you want to draw the shape in a specific color or at a certain width, you can choose the color and the width before or after drawing the shape.

1. To draw an oval or circle, click the Oval Tool and position the pointer where you want to draw the shape.

2. Click the mouse button and drag to draw the shape. Release the mouse button when the shape reaches the desired size.

**Drawing With a Pen**

Use the Pen Tool to draw curved and straight lines or to create shapes, just as you would when drawing with a piece of paper and a pen. You might want to use the Pen Tool to circle important information when presenting a file or to sketch a product design on the blank whiteboard. If you want to draw lines and shapes in a specific color or at a certain width, you can choose the color and the width before or after using the Pen Tool.

1. To draw lines and shapes as though you were using a pen, click the Pen Tool and position the pointer where you want to draw.
2. Click the mouse button and drag to draw the line or shape. Release the mouse button when you are finished.

## Entering Text

Use the Text Tool to enter text and numbers on the whiteboard. For example, you can enter a label for an illustration or a description for a process. If you want to enter text in a specific color, you can choose the color before or after entering the text.

1.  
   To enter text, click the Text Tool.

2.  
   Position the cursor and click where you want to place the text. Four small squares, or handles, appear.

3.  
   Enter the text. (You can also enter numbers and symbols.) As you type, the handles move apart and form a box around the text.

## Pointing to an Item on the Whiteboard

You can use the Pointer Tool to point to an important item during a whiteboard presentation.

**Note** Audience members in a broadcast meeting cannot see the whiteboard Pointer Tool. People who view a recording of a meeting also cannot see the Pointer Tool.

To point to an item:

1.  
   Click the arrow next to the Pointer Tool to select a pointer. After selecting a pointer, make sure the Pointer Tool is pressed in.

2.  
   Click on the whiteboard next to the item you want to emphasize. A pointer appears next to the item.

3.  
   (Optional) To use the same pointer to emphasize something else on the whiteboard, select the pointer and drag it to the new location.

4.  
   (Optional) To use a new pointer to emphasize something else on the whiteboard, repeat steps 1-2. The original pointer remains on the whiteboard.

**Tip** You can delete a pointer just as you would delete any other whiteboard item.

**Note** The Pointer Tool is not saved when the Moderator saves a whiteboard file.
Customizing Your Presentation

After you have entered text and drawn shapes and lines on the whiteboard, you can customize your presentation. For example, you can change the color of anything you have drawn on the whiteboard. You can also move, delete, and resize items on the whiteboard. See these topics for more information:

- **Using Color**: Choose the color of shapes, lines, and text on the whiteboard.
- **Choosing a Line Width**: Choose a line width for lines and shapes.
- **Formatting Text**: Choose a font, size, and style for text.
- **Selecting, Resizing, and Moving Whiteboard Content**: Select, resize, or move items on the whiteboard.
- **Deleting Whiteboard Content**: Remove individual items from the whiteboard or remove everything you have created from the whiteboard.

Using Color

You can choose a color for shapes, lines, and text on the whiteboard either before or after you create them. The following table identifies the available tools for choosing a color.

<table>
<thead>
<tr>
<th>Tool</th>
<th>Tool Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Line" /></td>
<td>Line Color Well</td>
<td>The button next to the word “Line.” Allows you to color lines, text, and the outlines of shapes.</td>
</tr>
<tr>
<td><img src="image" alt="Fill" /></td>
<td>Fill Button</td>
<td>The button labeled “Fill.” Allows you to add the color in the Fill Color Well to a selected shape. Click the Fill button again to remove the color from the selected shape.</td>
</tr>
<tr>
<td><img src="image" alt="Fill" /></td>
<td>Fill Color Well</td>
<td>The button next to the word “Fill.” Allows you to color the insides of shapes.</td>
</tr>
<tr>
<td><img src="image" alt="Color Chooser" /></td>
<td>Color Chooser</td>
<td>The box next to the color wells. Allows you to choose a specific color for anything you create on the whiteboard.</td>
</tr>
</tbody>
</table>

Coloring Lines and Text

Use the Line Color Well to color:
- Lines drawn with the Arrow, Pen, and Line Tools
- The outlines of rectangles, squares, ovals, and circles
- Text
To color lines and text:

1. Click the Line Color Well, and then move the small square in the Color Chooser to the desired color.
2. You can now draw lines, enter text, and draw shapes to be outlined in the chosen color.

To change the color of a line or outline after you have drawn it, select the item and then choose a new color. You can also select text to change its color.

**Coloring Shapes**

Use the Fill Color Well to color shapes on the whiteboard.

1. Make sure that the Fill button is pressed down.
2. To choose a color for a shape, click the Fill Color Well and then move the small square in the Color Chooser to the desired color.
3. You can now draw shapes that are filled with the chosen color.

To change the color of a shape after you have drawn it, select the shape and then choose a new color. To change the color of the shape's outline, see “Coloring Lines and Text.”

To remove the color from the inside of a shape, make sure the shape is selected, and then click the Fill button so that it is no longer pressed down. The fill color is removed.

**Tip** You can change the fill and line colors of a shape at the same time by pressing SHIFT and clicking the Line Color Well and then the Fill Color Well. While both color wells are pressed down, choose the new color in the Color Chooser.

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**Choosing a Line Width**

Use the Line Width Tool to change the width of lines on the whiteboard. You can also change the line width of shapes. You cannot change the line width of text. (See “Formatting Text” to change the appearance of text.)

1. To choose a line width for a line or shape, click the tool you want to use: Pen, Line, Arrow, Rectangle, or Oval. Move the bar in the Line Width Tool to the line width you want.
2. You can now create the line or shape with the line width you selected.

To change the width of a line or shape after you have drawn it, select the item and then choose a new line width.
Formatting Text

Use the Font Tool to change the font, style, and size of text either before or after you enter the text. To change the color of text, see “Coloring Lines and Text.”

1. Click the Text Tool or select text that you have already entered on the whiteboard.
2. Click the Font Tool.
3. In the Font Panel dialog box, select the font, style, and size for the text.
4. Click OK. You can now enter text in the format you selected.

To change the format of text after you have entered it, select the text and then follow steps 2-4 above.

Selecting, Resizing, and Moving Whiteboard Content

Selecting and Resizing Whiteboard Content

The Selection Tool allows you to select anything that you have created on the whiteboard. You must select text, lines, and shapes on the whiteboard before you can make any changes to them. (You cannot resize text. See Formatting Text to change the appearance of text.)

- To select an item on the whiteboard, click the Selection Tool, and then click the item you want to select. Small squares, or handles, appear around the item.
- To resize an item, click one of the handles and drag the mouse. Release the mouse when the item reaches the desired size.

Note You cannot resize text or any shapes that were created with the Pen Tool.

Moving Whiteboard Content

You can also use the Selection Tool to move lines, shapes, and text to any location on the whiteboard.

1. Click the Selection Tool, and then click the item that you want to move.
2. Hold the mouse button down and drag to move the item. Release the mouse button when the item reaches the desired location.
Deleting Whiteboard Content

The Delete Tool allows you to delete lines, shapes, and text that you have drawn or entered on the whiteboard. To delete an item on the whiteboard, click the Delete Tool, and then click the item you want to delete. Small squares, or handles, appear around the item before you delete it.

You can also use the Delete Tool to delete everything you have created on the whiteboard. (If you are working with an attached file, the file is not deleted.) To delete everything on the whiteboard, click the Delete Tool and then press CTRL and click anywhere on the whiteboard.

Editing a Presentation

To edit a presentation with the whiteboard tools or to present a file on the whiteboard, you must have permission to edit/share. To find out if you have permission, move the mouse pointer over your name in the Participant List and look at the tooltip. If you do not have permission to edit/share, you can send a private chat message to the Moderator to ask for permission.

If you want other participants to edit your presentation, they must have permission to edit/share. If you are the Moderator and you want to give a participant permission to edit/share, select the participant's name in the Participant List and choose Permissions - Grant - “Permission to Edit/Share.” If you are not the Moderator and you want a participant to edit your shared file, ask the Moderator to grant that participant permission to edit/share.

After you have permission to edit/share, you can edit with the whiteboard tools. See the following procedures:

- “Drawing on the Whiteboard”
- “Entering Text”
- “Pointing to an Item on the Whiteboard”
- “Formatting Text”
- “Using Color”
- “Choosing a Line Width”
- “Selecting, Resizing, and Moving Whiteboard Content”
- “Deleting Whiteboard Content”
Presenting Information with Screen Sharing

You can use screen sharing to work together or to give a presentation. Use screen sharing when:

- You need to use a computer software program to demonstrate a procedure.
- You want to save the edited contents of a file in the original file format. For example, you can share a Lotus Word Pro file, allow a participant to make changes to it, and then save the edited file in Lotus Word Pro.
- You want to allow other meeting participants to use their computers to edit your presentation.
- You want to be sure that no one sees your presentation before the meeting begins.
- You want to share animated graphics during your presentation.
- You have a fast computer or you are only using one or two programs.

Permission to Edit/Share

Permission to edit/share allows you to:

- Share your screen.
- Control a screen shared by another participant.

You do not have to be the Meeting Moderator to share your screen with other participants, but you must have permission to edit/share. To make sure that you have permission to edit/share, move your mouse pointer over your name in the Participant List and look at the tooltip. See “Viewing Your Permissions” for more information. If you do not have permission to edit/share, see “Asking for Permissions.”

If you want to allow other participants to control the shared screen, they must also have permission to edit/share. You can check the permissions of a meeting participant by moving the mouse pointer over the participant’s name and looking at the tooltip. If the participant that you want to control the shared screen does not have permission to edit/share, the Moderator must grant permission.

Note Your system administrator might not allow other participants to control a shared screen. See “Customization by the Administrator” for more information.
Preparing for Screen Sharing
Before you begin screen sharing you should:

• Make sure that you have permission to edit/share.
• Learn how to protect confidential information on your computer by reading “Ensuring Security.”
• Ensure the most efficient screen-sharing meeting by reading “Improving Screen-Sharing Performance.”

Ensuring Security

Screen sharing presents potential security risks. For example, when you share your entire screen or part of your screen, other participants see everything within the shared area. Participants might view confidential information that you did not intend to share. When you allow other participants to control a program on your computer, they can perform any functions that the shared program allows. Participants might inadvertently change or delete an important file on your computer.

To protect any confidential information, you should take the following security measures before sharing a screen:

• Password protect the online meeting.
• Close all programs that you do not want to share.
• Carefully choose the programs you share.
• Allow other participants to control shared programs only when necessary.
• Share your entire screen or part of your screen only when necessary. (Make sure that you do not display any confidential information.)

Tips for Improving Screen-Sharing Performance

Use the following tips to get the best performance when you share your screen:

• **Lower your color settings.** Set your computer’s color palette to 256 Colors. (To access the color palette, right-click on the desktop, select Properties, and then choose the Settings tab.) When you use a higher color setting, images take more time to transmit. Use a higher color setting only when image quality is extremely important and transmission speed is not an issue.
• Use the smallest window size that is practical when you share a program. Or, you can share part of the screen instead of sharing a program.
• Allow time for all participants to join the meeting before you begin sharing. Otherwise, participants might notice periodic interruptions in the meeting as others join.
• Avoid switching between windows within the program you are sharing. Switching between windows slows performance, especially when you share programs that use many colors (such as paint packages).
• If possible, avoid switching between programs.
• Use the fastest computer available.
• Do not run unnecessary programs.
• Turn off desktop patterns and pictures when sharing part of the screen or the entire screen. Also turn off your computer’s taskbar icons and clocks if possible.

**Tips for Using Screen Sharing to Work Together**

Follow these guidelines to increase your group’s productivity when you use screen sharing:

• Read “Ensuring Security.”
• Read “How to Share Your Screen” for information about the best method for sharing your screen: Share a Program, Share My Entire Screen, or Share Part of My Screen with a Frame.
• To control your screen, participants must have permission to edit/share. Ensure that participants have permission to edit/share by moving your mouse pointer over their names in the Participant List and reading the tooltip. If a participant does not have permission to edit/share, the Moderator must grant permission to the participant.
• After you begin sharing, use the Tools menu commands or the screen-sharing toolbar to let others take control or to remove control from other participants.
• Save the shared file frequently.
• Be sure to save the final version of the file that was edited during the meeting.
Using Screen Sharing for a Presentation

You can use either the whiteboard or screen sharing to give a presentation. Choose screen sharing when you want to share animated graphics, allow others to change your original file, or save your presentation in its original format.

You can also use screen sharing to demonstrate a process. For example, you might want to use screen sharing to teach a large number of people how to use a software program.

To give a presentation with screen sharing:

1. Choose a sharing method. The method you choose depends on your purpose. For example, if you want to present a file that you prepared in Lotus Freelance Graphics, open Freelance Graphics on your computer, choose “Share a Program,” select Freelance Graphics, click Share Program, and open your file. See “How to Share Your Screen” for more information.

2. Present your information. The way you conduct your presentation depends on how much interaction you want in the meeting.
   • Many presentations do not require other participants to edit the shared information. If you do not want others to make changes to your presentation, do not allow others to control the screen. Continue with your presentation and proceed to step 3.
   • If you do want others to make changes to your presentation (for example, if you want to allow someone to edit the file you are sharing), allow others to control the screen. (Remember that during broadcast meetings, most people can only watch and listen, but you can allow other presenters to control the shared screen.)

3. Save your presentation file. Save the file on your computer.

4. Stop sharing. When you are finished, stop sharing.

Note Do not leave the meeting while sharing your screen. If you do, others will no longer be able to see the shared screen. Be sure to stop sharing before you leave the meeting.

Using the Screen-Sharing Toolbar

You can perform most screen-sharing tasks using either the screen-sharing toolbar or the Tools menu. If you have permission to edit/share, the screen-sharing toolbar appears above the shared area when the screen-sharing button is clicked.
**Tip** If the toolbar is not visible, choose View - Toolbar to turn on the check mark and display the toolbar.

The table below describes the toolbar buttons.

<table>
<thead>
<tr>
<th>Toolbar Button</th>
<th>Button Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Fit Shared Area to Window" /></td>
<td>Fit Shared Area to Window</td>
<td>See all of the shared information without scrolling. Clicking this button does not affect what other participants see on their screens.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>Note</em> This button is most useful when you are sharing a whiteboard file or viewing information shared by another participant. If you are sharing your own screen, this button has no effect.</td>
</tr>
<tr>
<td><img src="image" alt="Make Shared Area Full Screen" /></td>
<td>Make Shared Area Full Screen</td>
<td>Maximize the shared area to see a larger view of it. When the shared area is maximized, you cannot see the Meeting Room. To return to the original Meeting Room layout, click the floating Undo Full Screen button or press ESCAPE. Clicking this button does not affect what other participants see on their screens.</td>
</tr>
<tr>
<td><img src="image" alt="Share a Program" /></td>
<td>Share a Program</td>
<td>Share an open program with other participants.</td>
</tr>
<tr>
<td><img src="image" alt="Share My Entire Screen" /></td>
<td>Share My Entire Screen</td>
<td>Share the entire contents of your screen. (This icon also appears next to your name in the Participant List details when you share your entire screen.)</td>
</tr>
</tbody>
</table>
How to Share Your Screen

You can share your screen in three ways:

- **Share a Program**: Use this method when you want to share a specific program on your computer. This method is a good choice if you are concerned about preserving private information, because the windows of other programs are hidden from meeting participants. For example, you can share a Lotus 1-2-3 file in a meeting, and other participants see only the Lotus 1-2-3 window from your screen.

- **Share My Entire Screen**: Use this method when you want to easily switch between multiple programs. Other participants can see everything on your screen, including icons, programs, and the desktop, so you must carefully consider your need to preserve private information. This method might be slower than the other two methods.

**Note**  When you share your entire screen, a message informing you that you are sharing your screen appears. By default, you begin by sharing the Meeting Room. To share something else, minimize the Meeting Room by clicking the minimize button. (Do not click the X button.)
• **Share Part of My Screen with a Frame:** Use this method when you want the most control over what other participants can see. When you share part of your screen, other participants see only what is enclosed within the borders of the resizable frame.

Remember that security risks increase when you allow other participants to control your screen, no matter which sharing method you choose.

**Sharing Your Screen**

Before sharing your screen and allowing others to control it, read “Ensuring Security.”

You must have permission to edit/share to share your screen. To check that you have permission, move your mouse pointer over your name in the Participant List and read the tooltip. If you do not have permission, see “Asking for Permissions.”

1. Make sure that any programs that you want to share are open.
2. Choose a screen-sharing method from the Tools menu or the screen-sharing toolbar:
   - ![Share a Program](image)
   - ![Share My Entire Screen](image)
   - ![Share Part of My Screen with a Frame](image)
3. If you chose “Share a Program” in step 2, select a program and click Share Program. The program automatically appears on your screen. If you chose another screen-sharing method, skip to step 4.
   **Tip** Click Refresh List to update the list of programs that are open on your computer.
4. ![Confirm Sharing](image)
   Confirm that you are sharing. When you are sharing, you see a Stop Sharing button in the title bar of the shared area. You also see a sharing icon next to your name in the Participant List details. Participants see your initials beside the cursor in the shared screen.
5. To switch sharing methods, choose Tools, and then choose another one of the methods listed in step 2.
   **Tip** Stop sharing your screen before you leave a meeting. If you leave a meeting while sharing your screen, other participants cannot see the shared screen.
Stop Sharing

You can stop sharing information at any time, even when another participant is controlling your screen. To stop sharing, click Stop Sharing on the screen-sharing toolbar or choose Tools - Stop Sharing.

Allowing Others to Control the Shared Screen

When you begin sharing your screen, you are the only participant who can control the screen on your computer. Other participants cannot control the screen unless you allow them to do so. You always maintain control of your screen, even when you allow other participants to control it.

After you allow others to control the shared screen, any participant can make changes to the shared information. For example, a participant who has control can edit a shared file or open a new file in a shared program. Before allowing other participants to control your screen, consider ways to protect your confidential information by reading “Ensuring Security.”

Note Your system administrator might not allow other participants to control the shared screen. See “Customization by the Administrator” for more information.

Tip To prevent confusion about who should control the screen, use computer audio, Meeting Room chat, or a telephone conference call to discuss the order in which participants should control the screen.

Giving Control to Other Participants

1. Make sure that the participants to whom you want to give control have permission to edit/share. Move your mouse pointer over each name in the Participant List and read the tooltip. If the participant does not have permission to edit/share, the Moderator must grant permission. See “Asking for Permissions” for more information.

2. 🗣️
   If you have not yet done so, begin sharing your screen. A sharing icon appears next to your name in the Participant List details. Other participants see your initials beside the cursor in the shared screen.

3. Choose Tools - “Let Others Control or Edit My Screen,” or click Allow Control in the floating toolbar. A check mark appears next to “Let Others Control or Edit My Screen” on the Tools menu. Anyone who has permission to edit/share can now control the shared screen.

   Tip To ensure that only one participant can control the shared screen, grant that participant permission to edit/share and revoke permission to edit/share from all other participants in the meeting.
4. At any time during the meeting, you can look at the Allow Control button to confirm that you have given control to the other participants. The Allow Control button remains pressed in while others have control. You can confirm who is controlling the shared screen by viewing the Participant List details. An arrow appears next to the name of the participant who is controlling the screen.

**Note** Do not use your keyboard or mouse while another participant has control.

**Removing Control from Other Participants**

To remove control from another participant and continue sharing, do either of the following:

- Choose Tools - “Let Others Control or Edit My Screen” to remove the check mark. When the check mark is gone, other participants cannot control your screen.
- Click Allow Control in the floating toolbar. Once Allow Control is not pressed in, other participants cannot control your screen.

If you click Stop Sharing or choose Tools - Stop Sharing, other participants automatically lose control of the shared screen.

**Tip** If you have trouble removing control of the shared screen, ask the controlling participant to stop moving the cursor.

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**Taking Control of the Shared Screen**

When you participate in a meeting that involves screen sharing, you need permission to edit/share before you can control or edit the shared screen. You cannot take control unless the sharing host allows other participants to control the screen.

**Note** Your system administrator might not allow other participants to control a shared screen. See “Customization by the Administrator” for more information.

Follow these steps to control a shared screen:

1. Ensure that the participant who is sharing the screen has allowed other participants to control the screen.

2. Verify that you have permission to edit/share by moving your mouse pointer over your name in the Participant List and reading the tooltip. See “Viewing Your Permissions” for more information. If you do not have permission to edit/share, you must ask the Moderator to grant this permission to you.
3. Choose Tools - Control Screen Sharing or click Control Screen Sharing in the screen-sharing toolbar. An arrow appears next to your name in the Participant List details. When you use the mouse or keyboard, everyone except the person who is sharing the screen sees your initials beside the cursor.

**Note** The participant who is sharing the screen must view the Participant List details to confirm who controls the shared screen.
Chapter 7: Communicating in a Meeting

In a meeting, you can use computer audio and video to speak as though you were in a face-to-face meeting, or you can use Meeting Room chat to send a written message to everyone in the meeting.

Use the following tips to communicate more effectively during your meeting:

• If you plan to use computer audio and video, be sure to test your audio and video before the meeting. Read Chapter 3, Preparing to Use Audio and Video, for more information.

• When you use Meeting Room chat, remember that everyone in the meeting can read your message. If you need to speak to only a few people in the meeting, select their names in the Participant List, right-click, and choose New Chat to start an instant chat meeting. For more information, see “Starting an Instant Meeting from the Participant List of an Active Meeting” in Chapter 4, Working with Sametime Meetings.

• Use computer audio and video when you are presenting information during a meeting. Use Meeting Room chat for a quick comment or observation or when you want to send a message to the other participants without interrupting the person who is currently speaking.

Communicating with Meeting Room Chat

Meeting Room chat is a public form of chat; you can use it to send typed messages to everyone in the meeting. You can use Meeting Room chat when audio is unavailable or when you need to ask a question during a meeting and do not want to interrupt the person who is currently speaking.

If you do not want to send your message to everyone in the meeting, you can double-click a name in the Participant List to start an instant chat meeting with that person.

To send a message with Meeting Room chat:

1. Place the cursor in the text-entry area. Enter your message.
   
   **Tip** Press SHIFT+ENTER to start a new line in your chat message.
2. Click Send or press Enter. The message appears in the chat-transcript area (above the text-entry area) and is seen by all meeting participants. Other participants' messages also appear in the transcript area in the order that they were sent.

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**Editing a Meeting Room Chat Message**

You can use the Edit menu to edit a Meeting Room chat message. Use the table below to find the editing task you need to do, and then follow the procedure next to it.

**Tip** To edit the text for an instant chat meeting (a private chat message), use the Edit menu in the chat window.

<table>
<thead>
<tr>
<th>Task</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy text from either the text-entry area or the chat-transcript area.</td>
<td>Select the text and choose Edit - Copy Chat. The selected text is copied to the clipboard.</td>
</tr>
<tr>
<td>Paste text into the text-entry area. (You cannot paste text into the chat-transcript area.)</td>
<td>Place the cursor in the text-entry area where you want to insert the text. Choose Edit - Paste Chat.</td>
</tr>
<tr>
<td>Remove all chat messages in your chat-transcript area. (You cannot remove the messages from other participants' chat-transcript areas.)</td>
<td>Choose Edit - Clear Chat.</td>
</tr>
<tr>
<td>Select all text in the chat-transcript area.</td>
<td>Place your cursor in the chat-transcript area and choose Edit - Select All.</td>
</tr>
<tr>
<td>Delete text in the text-entry area. (You cannot delete text from the chat-transcript area.)</td>
<td>Select the text and press DELETE.</td>
</tr>
</tbody>
</table>

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**Communicating with Computer Audio and Video**

When you use computer audio and video with Sametime, you and your colleagues can discuss a presentation while viewing it online. You can speak into a microphone, and everyone in the meeting can hear your voice. The number of people who can speak at a given time depends on the type of audio that you use in the meeting.

If your meeting includes computer video and you have a video camera attached to your computer, your video image is transmitted to everyone in the meeting when you speak into the microphone. You can also view your own video image in the My Video window, even when you are not speaking.
Types of Audio

You can use two types, or modes, of audio: Automatic Microphone mode and Request Microphone mode. All meetings begin in Automatic Microphone mode.

Automatic Microphone Mode
Automatic Microphone mode is suitable for small meetings in which everyone might need to speak or in meetings with interactive discussion. When you use Automatic Microphone mode, any meeting participant can speak into the microphone at any time to be heard by the other participants. However, only two participants can be heard at the same time. (This is a natural way to converse, because it is possible for one participant to interrupt another.) The first two people in the meeting who begin talking become the speaking participants. If two people are already speaking at once, a third person must wait for one of them to stop speaking.

A “currently talking” icon appears next to the name of the speaking participant in the Participant List.

Request Microphone Mode
Request Microphone mode is suitable for larger meetings in which only a few people need to speak or for meetings with minimal interactive discussion. For example, Request Microphone mode works well for meetings in which participants need to speak in turn, without interruption.

During a meeting that uses Request Microphone mode, only one person can speak at a time. You can click a button to request the microphone and speak during the meeting. A “currently talking” icon appears next to the speaking participant’s name in the Participant List. The speaking participant must release the microphone before another participant can talk.

In Request Microphone mode, the Moderator can remove the microphone from the person who currently has it and pass the microphone to the next person who requested it.

Video Windows

The two video windows are labeled Speaker’s Video and My Video. The Speaker’s Video window displays the person who is currently speaking in a meeting. The My Video window displays your own video image. You must have a video camera attached to your computer to view your own image, but you can view the speaking participant’s image without a video camera.
Permission to Speak

The Moderator must give you permission to speak before you can speak or transmit video during a meeting that includes computer audio and video. To make sure that you have permission to speak, move the mouse pointer over your name in the Participant List and look at the tooltip. See “Viewing Your Permissions” for more information. If you do not have permission, see “Asking for Permissions.”

Communicating in a Meeting

In a meeting, you can use computer audio and video to speak as though you were in a face-to-face meeting, or you can use Meeting Room chat to send a written message to everyone in the meeting.

Use the following tips to communicate more effectively during your meeting:

- If you plan to use computer audio and video, be sure to test your audio and video before the meeting. Read “Preparing to Use Audio and Video” for more information.
- When you use Meeting Room chat, remember that everyone in the meeting can read your message. If you need to speak to only a few people in the meeting, select their names in the Participant List, right-click, and choose New Chat to start an instant chat meeting.
- Use computer audio and video when you are presenting information during a meeting. Use Meeting Room chat for a quick comment or observation or when you want to send a message to the other participants without interrupting the person who is currently speaking.

Tips for Improving Computer Audio Quality

To improve the sound quality when using computer audio:

- Use a high-quality microphone. When you move the microphone connection wire, you should not hear static or hissing, and the sound should not cut out.
- Use a speakerphone that includes echo cancellation. The Polycom SoundPoint PC speakerphone is recommended.
- Do not lay the microphone on the table. (Laying the microphone down amplifies noise.)
- Do not place the microphone near your speakers.
• If possible, use a headset that contains a boom microphone. If you are using a boom microphone, do not touch the microphone with your face or hands. Also, do not breathe loudly near the microphone.

• If you are using a desktop microphone, a unidirectional dynamic microphone with batteries is recommended.

• Do not use a microphone with an on and off switch unless the microphone is of high quality.

**Note** Be sure to test your audio and video equipment before participating in a meeting with computer audio and video. You can test your audio and video when you test a meeting. To test a meeting, click Test Meeting in the Meeting Center or choose Options - Test Meeting in the Sametime Connect window.

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**Speaking During the Meeting**

You must have permission to speak before you can speak during a meeting that includes audio and video. If necessary, you can ask the Moderator for permission.

**Tip** After you speak, mute your microphone to avoid transmitting noise (such as shuffling papers or typing on the keyboard) to other participants. If you continue to transmit noise after you speak, your video image might continue to be displayed.

**In Automatic Microphone Mode**

During a meeting that includes Automatic Microphone mode, you can speak into your microphone at any time to be heard by all participants. Only two participants can speak at once.

You might need to adjust your microphone sensitivity during a meeting in Automatic Microphone mode. Adjusting your microphone sensitivity prevents you from transmitting noise (such as shuffling papers or typing on the keyboard) to other participants when you are not speaking.

**In Request Microphone Mode**

During a meeting that includes Request Microphone mode, you must request the microphone before you can speak. To speak during a meeting while using Request Microphone mode:

1. Choose Tools - Audio - Request Microphone or click Request Microphone. A “waiting to talk” icon appears next to your name in the Participant List, and the label on the Request Microphone button changes to Release Microphone.
Tip If you decide you do not want to speak after you have requested the microphone, click the Release Microphone button while someone else is speaking. The icon next to your name disappears, and you are no longer waiting for the microphone.

2. You will receive the microphone in turn. After you receive the microphone, a “currently talking” icon appears next to your name in the Participant List.

Note When the participant who is speaking releases the microphone, the first person who requested the microphone becomes the next participant to speak. For example, if Etienne, Maria, and Bob are in a meeting and Bob is speaking, Etienne and Maria might both click the Request Microphone button. If Maria clicks the button first, she receives the microphone after Bob releases it. When Maria finishes speaking and releases the microphone, Etienne receives the microphone.

3. Speak into your microphone. Everyone in the meeting hears you. If you have a video camera attached to your computer, everyone sees your video image when you speak.

4. When you are finished speaking, choose Tools - Audio - Release Microphone or click Release Microphone to allow someone else to speak. The Meeting Moderator can pass the microphone to the next person if necessary. For example, the Moderator might pass the microphone if a participant has finished speaking but is having trouble releasing the microphone, or if a participant leaves the meeting without releasing the microphone.

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**Mutating Your Microphone or Your Speakers**

**Mutating Your Microphone**

You can mute your microphone so that no one in the meeting can hear you speak, or to ensure that you do not transmit noise (such as shuffling papers) while someone else is speaking. To mute the microphone, choose Tools - Audio - Mute My Microphone (a check mark appears), or select the Mute check box next to the microphone volume control bar.

To turn the microphone on again, choose Tools - Audio - Mute My Microphone (to remove the check mark), or clear the Mute check box next to the microphone volume control bar.

Note If you are using Request Microphone mode, you must request the microphone before speaking, even if your microphone is not muted.

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Mutating Your Speakers

You can mute your speakers so that you cannot hear anyone in the meeting. This feature is helpful when you need to stop listening to the meeting briefly so that you can attend to other business, such as answering a telephone call. To mute your speakers so that you cannot hear anyone in the meeting, choose Tools - Audio - Mute My Speakers (a check mark appears), or select the Mute check box next to the speakers volume control bar.

To turn the speakers on again, choose Tools - Audio - Mute My Speakers (to remove the check mark), or clear the Mute check box next to the speakers volume control bar.

Note No one else in the meeting will know that you have muted your microphone or your speakers.

Adjusting the Volume of Your Speakers

You can adjust the volume of your speakers in two ways:

• Move the bar next to the speakers icon to the desired position. The volume increases as you move the bar to the right. When someone in the meeting speaks, the indicator below the bar displays the volume level.

Note Some sound cards might require you to use your system mixer to adjust the microphone volume level. To adjust the microphone volume level with the system mixer, choose Tools - Audio/Video Preferences or click the Preferences button below the video windows. In the Recording section of the Audio tab, click Adjust System Mixer Recording Settings. When the system mixer appears, use the Microphone option to adjust the volume. See “Setting Recording Preferences” for more information.

Adjusting the Volume of Your Microphone

You can adjust the volume of your microphone in two ways:

• Move the bar next to the microphone icon to the desired position. The microphone volume increases as you move the bar to the right. When you speak, the indicator below the bar displays the microphone volume level.

• Choose Tools - Audio - Increase Microphone Volume or Tools - Audio - Decrease Microphone Volume. You can continue selecting either of these menu items to increase or decrease the microphone volume in small increments.

Note Some sound cards might require you to use your system mixer to adjust the microphone volume level. To adjust the microphone volume level with the system mixer, choose Tools - Audio/Video Preferences or click the Preferences button below the video windows. In the Recording section of the Audio tab, click Adjust System Mixer Recording Settings. When the system mixer appears, use the Microphone option to adjust the volume. See “Setting Recording Preferences” for more information.
Choose Tools - Audio - Increase Speaker Volume or Tools - Audio - Decrease Speaker Volume. You can continue selecting either of these menu items to increase or decrease the microphone volume in small increments.

Note Make sure that the volume on your computer is high enough. (If the volume on your computer is too low, adjusting the volume of your speakers or microphone in the Meeting Room will not affect the volume of your voice or others’ voices in the meeting.) Check the volume of your speakers and microphone on your system mixer. See “Setting Recording Preferences” and “Setting Playback Preferences” for more information.

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**Viewing the Participant Who Is Speaking**

If your online meeting includes computer audio and video, you can view the person who is speaking by clicking the Speaker’s Video tab. (If the Speaker’s Video tab is not visible, choose View - Participant List Column - Video Windows to display the video windows.) You can view the speaking participant’s video even if you do not have a video camera attached to your computer.

If you are using a modem to attend the meeting and you are not receiving video as quickly as the other participants, you might want to pause the video. To pause the speaking participant’s video image, choose Tools - Video - Pause Speaker’s Video or click Pause in the Speaker’s Video window. When you pause the video image, you no longer receive any video. The Sametime logo displays in your video window. To play the image again, click Play. Clicking Pause or Play in the Speaker’s Video window only affects the image in your Speaker’s Video window; no one else sees the video image pause.

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**Viewing Your Own Video Image**

You can view your own video image by clicking the My Video tab. (If the My Video tab is not visible, choose View - Participant List Column - Video Windows to display the video windows.) You must have a video camera attached to your computer to view your own video image. If you are the speaking participant in a meeting with more than two people, you see your own image in both the My Video and Speaker’s Video windows. If you are in the meeting with only one other person, you see the other participant in the Speaker’s Video window at all times.
To pause your own video image, choose Tools - Video - Pause My Video or click Pause in the My Video window. To play the image again, click Play. If you are the speaking participant and you pause your own video image in the My Video window, everyone in the meeting sees the Sametime logo in their Speaker’s Video windows. If you are not the speaking participant and you pause your Speaker’s Video image, you are the only one in the meeting who sees the Sametime logo.

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**Floating the Video Windows**

It is sometimes convenient to view the video windows outside of the Meeting Room. For example, it is helpful to view the meeting video while you are working in a program that you are sharing with other meeting participants. To view a video while working outside the Meeting Room, you can “float” the video windows to separate them from the Meeting Room.

To float the video windows, click the Float Video Windows button or choose View - Video - Float Video Window. When the video windows are floating, you can move them anywhere on your computer screen. To return the video windows to the Meeting Room, click the Float Video Windows button again or choose View - Video - Float Video Window to remove the check mark.

**Tip** If you are sharing a program in a meeting that includes audio and video, you might want to float the video windows and then resize the window of the shared program so that you can see video and share your program simultaneously. Remember that if you are sharing your entire screen, everyone in the meeting will see your video windows when you float them.

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**Using a 360-Degree Video Camera with Sametime**

Sametime supports a video camera that allows meeting participants to view a 360-degree area around the camera. If the speaking participant in a meeting uses a 360-degree camera, all other participants can scroll their video windows to see the area surrounding that participant. (You do not need to own a 360-degree camera to view the area around the speaking participant.)

When the person who has a 360-degree video camera stops speaking, and someone with a regular video camera begins speaking, the video switches to the new speaker. No other action is necessary to switch the video.
**Note** The only 360-degree video camera that Sametime supports is the TotalView High Res camera from BeHere Technologies. For more information about this video camera, such as required hardware and software, see the camera documentation.

**Transmitting 360-Degree Video**

If you are the speaking participant in an audio/video meeting and you have a 360-degree video camera, other participants in the meeting can see the entire room around you. If several people are in the same physical room that you are in, you might want to place the camera in a central location. For example, you could place the camera in the middle of a conference table. The camera does not need to be attached to the other participant’s computers; it will capture everyone in the room as long as it is attached to your computer.

When using a 360-degree video camera, use a microphone that can capture audio for an entire room (an omnidirectional microphone). Unidirectional microphones do not work properly with 360-degree video.

**Viewing 360-Degree Video**

When the speaking participant is using a 360-degree camera and you move your mouse pointer over the Speaker’s Video window, the mouse pointer changes to a double arrow. Move your mouse to the right or left edge of the Speaker’s Video window and then hold your mouse button down to scroll through the available video area.

If there is more than one person in the room with the 360-degree camera (for example, if several people are meeting in the same room, and they have placed the camera in the middle of a conference table), you can see other people as you scroll. To see the entire area around the camera without scrolling, float the video windows. When you scroll the Speaker’s Video window or float your video windows to view the full area around the camera, only your video is affected. No one else in the meeting sees the video scroll or float.

**Tip** If you notice that the video images are choppy, or if you are receiving video very slowly, you might be receiving video at a low bit rate. Ask your system administrator to allow you to receive video at a bit rate of 128K bits per second or higher.

**Note** Microsoft NetMeeting does not support 360-degree video. NetMeeting users cannot play the video in a meeting that uses a 360-degree video camera.
Viewing or Hiding the Audio Controls and Video Windows

**Audio Controls**

When a meeting includes computer audio, the audio controls (the speakers and microphone icons and the bars to adjust the speakers and microphone volume) are visible in the Meeting Room. Choose View - Participant List Column - Audio Controls to hide the controls from your view. (The check mark next to Audio Controls is removed.) Choose View - Participant List Column - Audio Controls again to show the audio controls.

**Video Windows**

When a meeting includes computer video, the video windows are visible in the Meeting Room. The Speaker's Video window displays the person who is currently speaking in a meeting. The My Video window displays your own video image. You must have a video camera attached to your computer to view your own image or to allow others to see your image. You can view the speaking participant’s video even if you do not have a video camera.

To hide the video windows, choose View - Participant List Column - Video Windows to remove the check mark. Choose View - Participant List Column - Video Windows again to display the video windows.

You can also use the View menu to choose which video window is in front. To place the Speaker's Video window in front of the My Video window, choose View - Video - Speaker's Video. To place the My Video window in front of the Speaker's Video window, choose View - Video - My Video.

When you view or hide the audio controls or video windows, you are the only meeting participant who sees a change in the Meeting Room.

Using Audio and Video in Multiple Meetings

When you are using audio and video in a meeting and you start a second audio/video meeting, your voice is heard in both meetings. Mute your microphone in the original meeting so that you are only heard in the second meeting. (You can also mute your microphone in the second meeting if you want to speak in the original meeting only.)

**Note** After you mute your microphone in the first meeting, your video image appears in the second meeting. If you were the last person to speak in the original meeting, your video image continues to appear in the original meeting until someone else in the original meeting speaks.

**Tip** You can also mute your speakers in one of the meetings if you do not want to listen to the audio in that meeting.
Setting Audio/Video Preferences in the Meeting Room

You can set the following audio/video preferences during a meeting in the Meeting Room:

- Audio preferences for recording (speaking into a microphone or speakerphone)
- Audio preferences for playback (listening to the meeting audio through speakers or headphones)
- Video preferences

To access the audio/video preferences, choose Tools - Audio/Video Preferences and click the appropriate tab (Audio or Video). You can also click the audio/video preferences button below the video windows to access the preferences.

**Note** Sametime Connect also allows you to set audio/video preferences. The preferences for Sametime Connect allow you to create a “profile” of your available audio and video tools (microphone, speakers, and camera). Other people can use your tools profile to decide whether to invite you to an instant meeting that includes computer audio and video.

Setting Recording Preferences

The audio preferences for recording allow you to:

- Use echo cancellation so that you don’t have to use a speakerphone or headset.
- Select a preferred device (sound card for a microphone or speakerphone).
- Adjust system mixer recording settings.
- Adjust the microphone sensitivity.

To access the recording preferences, choose Tools - Audio/Video Preferences and click the Audio tab.
Using Echo Cancellation

If you use echo cancellation, Sametime eliminates any echo caused by audio coming out of your speakers and going back into your microphone. This type of echo can occur when your speakers and microphone are too close together (for example, if you are using a laptop with speakers and microphone set close together or if you move your microphone too close to your desktop speakers).

To use echo cancellation, select the check box labeled “Use echo cancellation so that a speakerphone or headset is not necessary.” When this check box is selected, you do not need to use a headset or speakerphone to eliminate echoes from Sametime audio. See the topic “Why Is There an Echo in the Meeting?” for more help solving echo problems in a meeting.

Note To completely eliminate echoes in an audio meeting, everyone in the meeting must either select the echo cancellation check box in the audio preferences or use a headset or speakerphone with echo cancellation.

Tip If everyone in the meeting is using echo cancellation and you still hear an echo, someone in the meeting might have the microphone or speaker volume turned up too loud. Everyone should adjust the volume of their microphone and speakers to eliminate the echo.

Selecting a Preferred Recording Device (Sound Card for a Microphone or Speakerphone)

The device that you use when you speak into a computer (the device for “recording” your voice), such as a microphone or speakerphone, needs a sound card to function. (A sound card is a hardware component that allows your computer to produce sounds.) When you plug your microphone or speakerphone into your computer, you are actually plugging it into a sound card.

Note Sound cards are available in many physical forms. For example, some desktop systems include built-in sound cards, and some modems include sound cards.

If you have more than one sound card on your computer, you must select which sound card you want to use, and you must plug your microphone or speakerphone into the correct sound card. Use the audio preferences to select the sound card you want to use, and then ensure that your microphone or speakerphone is plugged into that sound card. If you are unsure which sound card to choose, experiment with the available options.

Note If you change your recording device during a meeting, you MUST click OK in the dialog box, leave the meeting, and attend the meeting again for the change to take effect.
Adjusting System Mixer Recording Settings

After selecting your preferred recording device, adjust system mixer settings for the device. When you adjust system mixer settings from within Sametime, the changes also affect your recording device when you use it with other programs. For example, if you use Sametime to set the recording volume for your microphone, your microphone will record audio at that volume when you use the microphone with other programs.

To adjust system mixer settings for your recording device:

1. Click "Adjust System Mixer Recording Settings" on the Audio tab. The system mixer appears.
   
   **Note** If you are using Windows 95 or Windows NT, you might have to make sure the Recording options appear in the system mixer. To display the Recording options, choose Options - Properties in the system mixer. Make sure the Recording option is selected in the Properties dialog box and click OK.

2. The settings that appear in your system mixer depend on your audio equipment. Follow the appropriate instructions below:
   
   • If your microphone is a headset that plugs into the microphone jack on your computer, use the Microphone option in the system mixer to adjust the microphone’s recording volume.
   
   • If you are using a speakerphone that plugs into a line-in jack on your computer, use the Line option to control the recording volume of the speakerphone.
   
   • If your system mixer includes a Master Record option, use this option to control the final output of the recording settings. If your system mixer includes the Master Record option and the Microphone option or the Line option, experiment with both controls to find an optimum setting.

Adjusting Microphone Sensitivity

Adjusting your microphone sensitivity prevents you from transmitting noise (such as shuffling papers or typing on the keyboard) to other participants when you are not speaking.

To adjust your microphone sensitivity, speak into your microphone. If the text reads “No Voice Detected,” move the slider bar farther to the right. Continue to adjust the sensitivity until the text reads “Voice Detected” when you speak and “No Voice Detected” when you are silent.

**Note** This setting is very important. If the text in the dialog box reads "Voice Detected" when you are silent, you might prevent other people from being heard during an audio/video meeting.
Setting Playback Preferences

The audio preferences for playback allow you to:

- Select a preferred device (sound card for speakers or headphones).
- Adjust system mixer playback settings.

To access the playback preferences, choose Tools - Audio/Video Preferences and click the Audio tab.

Selecting Your Preferred Playback Device (Sound Card for Speakers or Headphones)

The device that your computer uses to play sounds, such as speakers or headphones, needs a sound card to function. (A sound card is a hardware component that allows your computer to produce sounds.) When you plug your speakers or headphones into your computer, you are actually plugging them into a sound card.

**Note** Sound cards are available in many physical forms. For example, some desktop systems include built-in sound cards, and some modems include sound cards.

If you have more than one sound card on your computer, you must select which sound card you want to use, and you must plug your speakers or headphones into the correct sound card. Use the audio preferences to select the sound card you want to use, and then ensure that your speakers or headphones are plugged into that sound card. If you are unsure which sound card to choose, experiment with the available options.

**Note** If you change your playback device during a meeting, you MUST click OK in the dialog box, leave the meeting, and attend the meeting again for the change to take effect.

Adjusting Your System Mixer Playback Settings

After selecting your preferred playback device, adjust system mixer settings (such as the settings listed in step 2 below) for the device. When you adjust system mixer settings from within Sametime, the changes also affect your playback device when you use it with other programs. For example, if you use Sametime to set the playback volume for your speakers, your speakers will play audio at that volume when you use them with other programs.

To adjust system mixer settings for your playback device:

1. Click "Adjust System Mixer Playback Settings." The system mixer appears.

**Note** If you are using Windows 95 or Windows NT, you might have to make sure the Playback options appear in the system mixer. To display...
the Playback options, choose Options - Properties in the system mixer. Make sure the Playback option is selected in the Properties dialog box and click OK.

2. The settings that appear in your system mixer depend on your audio equipment. Follow the appropriate instructions below:

• Ensure that the Wave option is selected or that it is not muted. The Wave option manages the output channel that Sametime audio uses.

• Ensure that the Digital option is selected or that it is not muted.

• If your system mixer includes a Master Out or Volume option, use it to control the final output of the playback settings. (You might need to experiment with the Wave option and the Master Out option to achieve a comfortable playback volume.) Make sure that the Master Out option is not muted.

• Mute all other options for Playback.

---

**Setting Video Preferences**

The video preferences allow you to:

• Select a preferred video capture device.

• Set the video source.

• Set the video format and size.

To access the video preferences, choose Tools - Audio/Video Preferences and click the Video tab.

**Selecting Your Preferred Video Capture Device**

When you select a preferred video capture device, you are either:

• **Selecting the video card that you want to use with your camera.** Some cameras require a video card to function. (A video card is a hardware component that allows your computer to produce video images.) If your camera requires a video card, you plug the camera into the video card when you plug it into your computer.

If you have more than one video card on your computer, use the video preferences to select the video card you want to use, and then ensure that your camera is plugged into that video card. If you are unsure which video card to choose, experiment with the available options.

OR
• **Selecting a driver for your camera.** If your camera does not require a video card, you can plug it directly into your computer’s Universal Serial Bus (USB) port. If you have installed the software for more than one camera on your computer, use the video preferences to select the driver for the camera you want to use, and then plug that camera into the USB port on your computer.

**Note** If you change your video capture device, you MUST click OK in the dialog box, leave the meeting, and attend the meeting again for the change to take effect.

**Setting Your Video Source**

Some camera and capture card manufacturers support more than one input source or camera type. You might need to select a different video source before you can view video images.

To set your video source:

1. Click Set Video Source. The video source dialog box appears. (This dialog box differs depending on your camera manufacturer.)

2. Experiment with the available controls. Depending on your camera type, you might need to adjust settings such as brightness and contrast, or you might need to select a video source. If you cannot see your video image even after adjusting these settings, try setting your video format and size.

**Setting Your Video Format and Size**

Most cameras support more than one video size and format. You might need to experiment with the sizes and formats that Sametime supports before you can view video images.

To set the video format and size:

1. Click "Set Video Format and Size." The format and size dialog box appears. (This dialog box differs depending on your camera manufacturer.)

2. Select one of the video sizes listed below. Select the larger size if possible.

   - 176 x 144
   - 160 x 120

**Note** If you are using the TotalView High Res 360-degree video camera, choose the 768 x 192 video size.

3. Experiment with the various video formats. Sametime supports all of the video formats listed in the table below. (This table is also listed on the Video Preferences tab.) The formats at the beginning of the list require
less preprocessing, and therefore deliver better quality than the formats at the end of the list.

<table>
<thead>
<tr>
<th>Sametime Video Formats</th>
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<tbody>
<tr>
<td>I420</td>
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<tr>
<td>IYUV</td>
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<tr>
<td>YV12</td>
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<td>YVU9</td>
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<td>RGB24</td>
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<td>RGB32</td>
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<td>RGBT</td>
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</tbody>
</table>

**Note** If you are using the TotalView High Res 360-degree video camera, choose the RGB24 video format.

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**Troubleshooting Audio and Video During a Meeting**

Before attending a meeting that includes computer audio and video, test your audio and video to ensure that your microphone, speakers, and video camera are functioning properly. You can test your audio and video when you test a meeting. To test a meeting, click Test Meeting in the Meeting Center or choose Options - Test Meeting in Sametime Connect.

See the topics below for audio and video help during the meeting.

- “Why Can't I Join an Audio/Video Meeting?”
- “Why Is There an Echo in the Meeting?”
- “Why Can’t Anyone Hear Me Speak?”
- “Why Can't I Hear Anyone Speak?”
- “Why Is Everyone Else Experiencing Audio and Video Difficulties?”
- “Why Isn't My Camera Working with Sametime?”
- “Why Can't I See the Speaking Participant in the Speaker’s Video Window?”
- “Why Is the Image in the Speaker's Video Window a Sametime Logo?”
Tip If you have a problem with your audio or video, a warning button appears below the video windows. Click the button to view information about the audio or video problem.

Why Can't I Join an Audio/Video Meeting?

If you are unable to join a meeting that uses computer audio and video, make sure that your audio and video equipment is not already in use. For example, you might be in another audio/video meeting, or you might be using your audio equipment to play music. Close all programs that are using audio and video and try to join the meeting again.

Why Is There an Echo in the Meeting?

If you hear an echo in the meeting (whether it is your own voice or someone else's voice that is echoing), you are not the cause of the echo.

If you do NOT hear an echo in the meeting, but other participants DO hear an echo, follow the tips below:

- Either use headphones or a speakerphone with echo cancellation or select the "echo cancellation" check box in the Sametime audio preferences. To verify that you are using echo cancellation with your headphones or speakerphone, refer to the documentation for your headphones or speakerphone.

  Tip If everyone in the meeting is using echo cancellation and you still hear an echo, someone in the meeting might have the microphone or speaker volume turned up too loud. Everyone should adjust the volume of their microphone and speakers to eliminate the echo.

- Ensure that only one microphone is selected for recording in the system mixer. In the Meeting Room, choose Tools - Audio/Video Preferences. In the Recording section of the Audio tab, click "Adjust System Mixer Recording Settings." When the System mixer appears, make sure that only one microphone is selected. (If you use a microphone that is plugged into a laptop, you might see more than one microphone option. Make sure that the microphone you use is selected.)

- Use the latest version of your computer's audio driver. Ask your system administrator which audio driver you are using; you might be able to download the latest version from your sound card manufacturer's or computer manufacturer's Web site.
• Use a supported sound card and ensure that it functions properly. If your sound card is the problem, you can reduce the echo by turning down the playback volume in your system mixer. In the Meeting Room, choose Tools - Audio/Video Preferences. In the Playback section of the Audio tab, click "Adjust System Mixer Playback Settings." When the system mixer appears, turn down the volume of your playback components.

• Ensure that the Microphone option in your system mixer is set properly for playback. In the Meeting Room, choose Tools - Audio/Video Preferences. In the Playback section of the Audio tab, click "Adjust System Mixer Playback Settings." When the system mixer appears, make sure that the Microphone option is either muted or not selected. (The Microphone option should not be muted for recording.)

• Ensure that your speakers and microphone are not too close together.

• Ensure that you are using a microphone with headphones.

• Ensure that the Microphone is the only device chosen for recording in the system mixer. In the Meeting Room, choose Tools - Audio/Video Preferences. In the Recording section of the Audio tab, click "Adjust System Mixer Recording Settings." Make sure that the Microphone option is the only option that is selected and click OK.

  **Tip** If you tested your audio and video before the meeting and heard your voice echo back to you more than once, other people in the meeting will hear their own voices echo back to them during the meeting. Follow the instructions above to make sure that the Microphone is the only device chosen for recording.

  **Note** Because your sound card driver determines the user-interface options in the system mixer, the exact procedure for changing the system mixer options might vary. The above procedures should work for a variety of sound cards. See your sound card documentation for more detailed information.

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**Why Can't Anyone Hear Me Speak?**

If no one in the meeting can hear you speak, try the following solutions:

• If you are using Request Microphone mode, another participant might be speaking. Only one participant at a time can speak when using Request Microphone mode. To speak in this mode, click Request Microphone. If another participant has requested the microphone before you, you will receive the microphone when that participant finishes speaking.
• You must have permission to speak before you can speak during a meeting that includes computer audio. To see if you have permission, move your mouse pointer over your name in the Participant List and look at the tooltip. If necessary, you can ask the Moderator for permission.

• Ensure that your computer includes a supported sound card; ensure that the sound card is functioning properly. Ensure that your microphone is turned on and that it is plugged into the proper socket.

• Ensure that your microphone or headset has batteries if they are required. Ensure that the batteries are functioning.

• Ensure that the microphone is not muted. The check box next to the microphone icon should not be selected.

• Ensure that the volume of the microphone is high enough. Slide the volume bar farther to the right. If the volume is high enough, and you can see the green bars below the microphone icon move when you speak, the participants who cannot hear you might have a problem with their speakers. The participants who cannot hear you should try the solutions in “Why Can't I Hear Anyone Speak?”

• Ensure that the Microphone option in your system mixer is set properly for recording. In the Meeting Room, choose Tools - Audio/Video Preferences. In the Recording section of the Audio tab, click “Adjust System Mixer Recording Settings.” When the system mixer appears, make sure that the Microphone option is not muted. (The Microphone option should be muted for playback.)

  **Note** Because your sound card driver determines the user-interface options in the system mixer, the exact procedure for changing the Microphone option might vary. The above procedure should work for a variety of sound cards. See your sound card documentation for more detailed information.

• Adjust your microphone sensitivity to be sure that your microphone detects your voice when you speak. You can adjust your microphone sensitivity in the audio/video preferences.

• Ask the other participants in the meeting to adjust their microphone sensitivity to ensure that they are not transmitting noise (such as shuffling papers) when they are not speaking. Participants can adjust their microphone sensitivity in the audio/video preferences.

• If none of these suggestions work, speak to your system administrator. Your difficulty might be caused by the presence of a firewall.
**Why Can't I Hear Anyone Speak?**

If you cannot hear anyone speak during the meeting, try the following solutions:

- Ensure that your computer includes a supported sound card; ensure that the sound card is functioning properly.
- Ensure that your speakers are not muted. The check box next to the speakers icon should not be selected.
- Ensure that the volume of the speakers in the Meeting Room is high enough. Slide the volume bar under the speakers icon farther to the right.
- Ensure that the volume on your computer is high enough. You might have a physical knob to turn or a function key combination to press on your keyboard to increase the volume of your hardware.

**Why Is Everyone Else Experiencing Audio and Video Difficulties?**

Problems with your computer can cause audio and video difficulties for others. For example, if your microphone is shorting out (which generates a lot of noise), no one else in the meeting can speak or be heard. A computer with problems can also cause the other participants to experience a pause between the time when participants speak and the time when they are heard.

If all participants except you are experiencing audio and video difficulties, ensure that your computer (including hardware and software) is functioning and configured properly and that your system is not generating noise. If your system is generating noise, either mute your microphone when you are not speaking or adjust the sensitivity of your microphone.

**Tip** If everyone else in the meeting hears an echo, you might be causing the problem. See “Why Is There an Echo in the Meeting?” for more information.

**Why Isn't My Camera Working with Sametime?**

If your camera is not working with Sametime, but it does work with other programs, use the video preferences to:

- Select a preferred video capture device.
- Set the video source.
- Set the video format and size.

To access the video preferences, choose Tools - Audio/Video Preferences and click the Video tab.
Why Can't I See the Speaking Participant in the Speaker's Video Window?

The following situations can cause your Speaker's Video window to display the Sametime logo or someone other than the speaking participant:

- When the Speaker's Video window switches to the speaking participant, it displays that participant for a required amount of time. (This time is needed to stop the rapidly switching video from consuming network bandwidth.) The minimum time requirement might cause a participant who spoke previously to remain on display. In this case, a pause occurs between the time that the participant who is speaking is heard and the time that the participant's image is seen.

- The speaking participant might not be able to send video images to the other participants. In this case, the Speaker's Video window displays the Sametime logo. The Sametime logo is also displayed when the speaking participant pauses the video window.

- If a participant continues to transmit noise through the microphone after speaking (by typing on the keyboard or shuffling papers, for example), that participant's image might continue to be displayed in the Speaker's Video window. To prevent this problem, all participants should either mute the microphone after speaking or adjust the sensitivity of the microphone.

Why Is the Image in the Speaker's Video Window a Sametime Logo?

The following situations can cause the Speaker's Video window to display a Sametime logo:

- If you are the speaking participant and you pause the My Video window, every participant's Speaker's Video window displays the Sametime logo. Click Play in the My Video window to allow your video image to appear in the Speaker's Video window.

- If the Speaker's Video window switches to a new image that is currently paused, the window displays the Sametime logo. If you are the speaking participant, click Play in the My Video window to allow your video image to appear in the Speaker's Video window.
Chapter 8: Moderating a Meeting

Most meetings have a leader who conducts the meeting and makes sure it goes smoothly. Others in the meeting are usually observers who occasionally contribute to the meeting through conversation or presentations. In Sametime, the leader of a meeting is known as the Moderator. The Moderator is responsible for conducting the meeting and sending information to the participants.

Although the Moderator is often the person who creates the meeting, you do not have to create the meeting to be the Moderator. You are the Moderator of a meeting when:

- You create a scheduled meeting and do not specify another person as the Moderator on the Essentials tab of the New Meeting page. (Your name appears in the Meeting Moderator field by default when you create a meeting.)
- Someone else creates a scheduled meeting and specifies you as the Meeting Moderator on the Essentials tab of the New Meeting page.
- You start an instant meeting.
- A previous Moderator makes you the Moderator by switching the Moderator. You can confirm that you are the new Moderator by:
  - Clicking the status details button in the status bar. If you are the new Moderator, a message appears.
  - Viewing your name in the Participant List. The Moderator icon appears beside your name when you are the Moderator.

As the Moderator, you are responsible for conducting the meeting (which includes making sure the meeting begins and ends on time and handling permissions) and sending information, such as Web pages and poll questions, to meeting participants.

Ensuring that a Meeting has a Moderator

To ensure that a meeting has a Moderator:

- The person who creates the meeting must log on to Sametime when creating the meeting.
• The Moderator of the meeting must log on to Sametime when attending the meeting.

For example, if Etienne creates a meeting:

1. Etienne must log on to Sametime before creating the meeting. He can then do one of the following:
   • Leave his own name in the Moderator field of the Essentials tab of the New Meeting page. When he saves the meeting, he will be the Moderator for the meeting.
   • Choose someone else (such as his colleague Maria) as the Moderator for the meeting.

2. Before attending the meeting, the Moderator must log on to Sametime so that he or she can conduct the meeting.
   • If Etienne chose Maria as the Moderator in step 1, Maria must log on to Sametime before attending the meeting.
   • If Etienne chose himself as the Moderator in step 1, he must log on to Sametime before attending the meeting.

If Etienne does not log on to Sametime when creating the meeting, or if the Moderator does not log on to Sametime before attending the meeting, the meeting will not have a Moderator. No one will be able to conduct the meeting (including granting and revoking permissions) or send Web pages or poll questions to participants.

A meeting can also be left without a Moderator if the Moderator leaves the meeting. A meeting does not automatically end when the Moderator leaves. If only one person has moderated the meeting, the meeting continues without a Moderator if the Moderator leaves. Participants are then unable to control many aspects of the meeting. To prevent this situation, the Moderator should always select another Moderator before leaving the meeting.

Tip If Maria is the Moderator of a meeting and plans to switch the Moderator to Bob after an hour has passed, Bob must log on to Sametime before attending the meeting.

Multiple Moderators

A meeting cannot have more than one Moderator at a time, but several people might become the Moderator during a meeting. See “Switching the Moderator” later in this chapter for more information. If more than one person has been the Moderator of a meeting:

• The most recent Moderator is the only Moderator who can edit or delete the meeting when it is finished.
• If everyone who has moderated the meeting leaves the meeting, the original Moderator and the most recent Moderator can automatically become the Moderator again if they rejoin the meeting.

• If the current Moderator leaves the meeting, then the previous Moderator automatically becomes the Moderator again.

See the examples below for more information:

**Example: Editing or Deleting a Finished Meeting**
Bob creates a meeting and designates Etienne as the Moderator. During the meeting, Etienne switches the Moderator to Maria. When the meeting ends, Bob (as the meeting creator) and Maria (as the most recent Moderator) can edit or delete the meeting. Etienne (as the original Moderator) cannot edit or delete the finished meeting.

**Example: Rejoining a Meeting**
Charles is the original Moderator of a meeting. He switches the Moderator to Olga, who then switches the Moderator to Anna. Charles, Olga, and Anna all leave the meeting, and the meeting continues without a Moderator. Both Charles (the original Moderator) and Anna (the most recent Moderator) can automatically become the Moderator again if they rejoin the meeting. The first one to rejoin the meeting becomes the Moderator. Olga cannot automatically become the Moderator if she rejoins the meeting, because she is neither the original Moderator nor the most recent Moderator.

**Example: Leaving a Meeting**
Maria is the Moderator of a meeting. During the meeting, she switches the Moderator to Bob. Bob leaves the meeting without switching the Moderator. Maria automatically becomes the Moderator of the meeting when Bob leaves.

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**Moderating a Meeting**

Most meetings have a leader who conducts the meeting and makes sure it goes smoothly. Others in the meeting are usually observers who occasionally contribute to the meeting through conversation or presentations. In Sametime, the leader of a meeting is known as the Moderator. The Moderator is responsible for conducting the meeting and sending information to the participants.

Although the Moderator is often the person who creates the meeting, you do not have to create the meeting to be the Moderator. You are the Moderator of a meeting when:
• You create a scheduled meeting and do not specify another person as the Moderator on the Essentials tab of the New Meeting page. (Your name appears in the Meeting Moderator field by default when you create a meeting.)

• Someone else creates a scheduled meeting and specifies you as the Meeting Moderator on the Essentials tab of the New Meeting page.

• You start an instant meeting.

• A previous Moderator makes you the Moderator by switching the Moderator. You can confirm that you are the new Moderator by:
  • Clicking the status details button in the status bar. If you are the new Moderator, a message appears.
  • 🔄 Viewing your name in the Participant List. The Moderator icon appears beside your name when you are the Moderator.

As the Moderator, you are responsible for conducting the meeting (which includes making sure the meeting begins and ends on time and handling permissions) and sending information, such as Web pages and poll questions, to meeting participants.

Ensuring that a Meeting has a Moderator

To ensure that a meeting has a Moderator:

• The person who creates the meeting must log on to Sametime when creating the meeting.

• The Moderator of the meeting must log on to Sametime when attending the meeting.

For example, if Etienne creates a meeting:

1. Etienne must log on to Sametime before creating the meeting. He can then do one of the following:
   • Leave his own name in the Moderator field of the Essentials tab of the New Meeting page. When he saves the meeting, he will be the Moderator for the meeting.
   • Choose someone else (such as his colleague Maria) as the Moderator for the meeting.

2. Before attending the meeting, the Moderator must log on to Sametime so that he or she can conduct the meeting.
   • If Etienne chose Maria as the Moderator in step 1, Maria must log on to Sametime before attending the meeting.
   • If Etienne chose himself as the Moderator in step 1, he must log on to Sametime before attending the meeting.
If Etienne does not log on to Sametime when creating the meeting, or if the Moderator does not log on to Sametime before attending the meeting, the meeting will not have a Moderator. No one will be able to conduct the meeting (including granting and revoking permissions) or send Web pages or poll questions to participants.

A meeting can also be left without a Moderator if the Moderator leaves the meeting. A meeting does not automatically end when the Moderator leaves. If only one person has moderated the meeting, the meeting continues without a Moderator if the Moderator leaves. Participants are then unable to control many aspects of the meeting. To prevent this situation, the Moderator should always select another Moderator before leaving the meeting.

**Tip** If Maria is the Moderator of a meeting and plans to switch the Moderator to Bob after an hour has passed, Bob must log on to Sametime before attending the meeting.

### Multiple Moderators

A meeting cannot have more than one Moderator at a time, but several people might become the Moderator during a meeting. See Switching the Moderator for more information. If more than one person has been the Moderator of a meeting:

- The most recent Moderator is the only Moderator who can edit or delete the meeting when it is finished.
- If everyone who has moderated the meeting leaves the meeting, the original Moderator and the most recent Moderator can automatically become the Moderator again if they rejoin the meeting.
- If the current Moderator leaves the meeting, then the previous Moderator automatically becomes the Moderator again.

See the examples below for more information:

**Example: Editing or Deleting a Finished Meeting**

Bob creates a meeting and designates Etienne as the Moderator. During the meeting, Etienne switches the Moderator to Maria. When the meeting ends, Bob (as the meeting creator) and Maria (as the most recent Moderator) can edit or delete the meeting. Etienne (as the original Moderator) cannot edit or delete the finished meeting.
Example: Rejoining a Meeting
Charles is the original Moderator of a meeting. He switches the Moderator to Olga, who then switches the Moderator to Anna. Charles, Olga, and Anna all leave the meeting, and the meeting continues without a Moderator. Both Charles (the original Moderator) and Anna (the most recent Moderator) can automatically become the Moderator again if they rejoin the meeting. The first one to rejoin the meeting becomes the Moderator. Olga cannot automatically become the Moderator if she rejoins the meeting, because she is neither the original Moderator nor the most recent Moderator.

Example: Leaving a Meeting
Maria is the Moderator of a meeting. During the meeting, she switches the Moderator to Bob. Bob leaves the meeting without switching the Moderator. Maria automatically becomes the Moderator of the meeting when Bob leaves.

Conducting a Meeting
As the Moderator, you conduct the meeting by:

- Making sure that everyone is in the meeting and ready to participate
- Allowing participants to present information when necessary
- Answering participant questions
- Sending Web pages, poll questions, or files to participants when necessary

See the following topics for more information:

- “Making Sure That Everyone Has Arrived”
- “Reviewing the Agenda”
- “Handling Permissions”
- “Working with Raised Hands”
- “Attaching a File during a Meeting”
- “Conducting an Audio Meeting”
- “Monitoring the Length of the Meeting”
- “Switching the Moderator”
- “Sending Information to Participants”

Making Sure That Everyone Has Arrived
At the beginning of a meeting, the Moderator should allow time for participants to join the meeting before using tools such as screen sharing.

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Otherwise, participants might notice periodic interruptions as other participants join the meeting. You can check attendance by using audio (computer audio or a telephone conference call scheduled through Sametime or separately) or by looking at the Participant List.

## Reviewing the Agenda

You can review an agenda in a Sametime meeting in several ways:

- If you created the agenda before the meeting, you can attach it to the whiteboard when scheduling the meeting. When the meeting begins, you can display the file on the whiteboard and review the relevant information.
- If you created the agenda before the meeting but you did not attach it as a whiteboard file, you can attach the file during the meeting.
- If you did not create an agenda before the meeting, you can:
  - Use the whiteboard Text Tool to enter information for everyone to read.
  - Use screen sharing to share a program and create an agenda as a new file in that program.
  - You can continue to share your agenda throughout the meeting so that you can refer to the agenda as the meeting progresses.

## Handling Permissions

Only the Meeting Moderator can grant and revoke permissions. The types of permission in Sametime are:

- **Permission to edit/share**: Permission to draw on the whiteboard, share a screen, control the shared screen, and start instant meetings from the Meeting Room Participant List. (The administrator determines which tools are available and if passing control of the shared screen is allowed.)
- **Permission to speak**: Permission to use computer audio and video and the audio/video controls during the meeting.

Chatting, viewing sent Web pages, participating in polls, transferring files, and raising a hand do not require permissions. If a meeting includes these tools, all participants can use any of the tools at any time.
Permissions in Different Types of Meetings

Instant Meetings
The participant who starts the instant meeting is the Moderator. At the start of the meeting, all participants, including the Moderator, have all permissions. After the meeting starts, the Moderator can revoke and grant permissions.

Scheduled Meetings
The creator of the meeting selects the Moderator. The Moderator always has all permissions, but the meeting type determines which permissions other participants can have:

- **Collaboration Meeting**: All participants have all permissions. After the meeting starts, the Moderator can revoke and grant permissions.
- **Moderated Presentation or Demo**: Only the Moderator has permissions. After the meeting starts, the Moderator can grant and revoke permissions.
- **Broadcast Presentation or Demo**: All presenters have all permissions. After the meeting starts, the Moderator can revoke and grant the presenters' permissions. Audience members have no permissions and cannot be granted permissions.

Granting and Revoking Permissions
The Moderator can grant and revoke permissions by selecting a participant's name and choosing an option from the Permissions menu or right-clicking the selected name and choosing an item from the shortcut menu.

The table below describes the items on the Permissions menu.

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Give Microphone to Next Person</td>
<td>In a meeting that includes computer audio in Request Microphone mode, the Moderator can pass the microphone from the current speaker to the next participant who is waiting to talk. See “Conducting an Audio Meeting” for information.</td>
</tr>
</tbody>
</table>

*continued*
Grant | Grants permissions to selected participants. Select participants' names from the Participant List or the Participant List details, and choose All Permissions (permission to edit/share and permission to speak), “Permission to Speak,” or “Permission to Edit/Share.” Check marks for the permissions appear next to the selected participants' names in the Participant List details.

**Note** If the meeting does not include a tool, the permission column for that tool is unavailable. For example, if a meeting does not include computer audio and video, the “Permission to Speak” column is unavailable.

Grant to Everyone | Grants permissions to all participants. You do not need to select participants' names. Choose All Permissions (permission to edit/share and permission to speak), “Permission to Speak,” or “Permission to Edit/Share.” Check marks for the permissions appear next to all participants' names in the Participant List details.

Revoke | Revokes permissions from selected participants. Select participants' names from the Participant List or Participant List details, and choose All Permissions (permission to edit/share and permission to speak), “Permission to Speak,” or “Permission to Edit/Share.” The check marks next to the selected participants' names disappear.

Revoke from Everyone | Revokes permissions from all participants. You do not need to select participants' names. Choose All Permissions (permission to edit/share and permission to speak), “Permission to Speak,” or “Permission to Edit/Share.” The check marks next to the selected participants' names disappear.

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# Working with Raised Hands

During a meeting, any participant can raise a hand to get the Moderator's attention. The list below describes some possible ways for you to work with raised hands during a meeting.

As the Moderator, you can:

- Raise your hand just like any other participant. You might want to raise your hand to signal a presenter to finish a presentation, to ask a question, or to let others know that you have returned after a brief absence.
- Ask a question with Meeting Room chat and tell participants to respond by raising their hands. For example, ask all participants who prefer a certain product design to raise their hands.
- Recognize participants who have raised a hand by speaking to them with computer audio or by sending them a private chat message. For example, a participant might raise a hand and then send a chat message asking for permission to speak.
- Lower the hand of any meeting participant. You might need to lower the hand of a participant who has left the meeting, or you might want to lower everyone's hands after they have responded to a question.
- See how many people in the meeting have raised their hands by looking at the hand icon in the status bar at the bottom of the Meeting Room.

## Lowering Hands

You can lower all raised hands or just the hands of selected participants.

- To lower all hands, click the lower all hands button or choose Tools - Lower All Hands. The hand icons in front of the names disappear.
- To lower selected hands, select the names of the appropriate participants in the Participant List and right-click. Choose Lower Selected Hands from the shortcut menu that appears. (You can also select names in the Participant List, and then choose Tools - Lower Selected Hands.) The hand icons in front of the selected names disappear.
Sorting By Raised Hands

You can sort the names in the Participant List by the order in which participants have raised their hands. Sorting by raised hands is helpful if the meeting has so many participants that the Participant List cannot display all of their names at once.

To sort by raised hands, click the hand icon at the top of the Participant List. The name at the top of the list is the first person who raised a hand. To return the Participant List to alphabetical order, click Name at the top of the list.

Attaching a File During a Meeting

As the Moderator, you can attach files to the whiteboard at any time during a meeting. This feature is useful if you need to share a file that was not attached when the meeting was created. If another meeting participant has the file, you must ask that participant to transfer the file or e-mail it to you so that you can attach the file to the whiteboard.

For best results, follow the guidelines for preparing files for the whiteboard.

Note The Moderator can also save a changed whiteboard file.

To attach a file to the whiteboard during a meeting:

1. Click the “Attach a File” button or choose Tools - “Attach a File to the Whiteboard.”

2. Click the link to check supported file types. Search for your file type in the list of files that Sametime can automatically convert for whiteboard display.

3. Do one of the following:
   - If Sametime can automatically convert your file type, click Browse to select the file from your computer. If you want to attach a Sametime whiteboard file (SWB) from another meeting, see Accessing Meeting Details. After choosing the file, continue to step 4.
   - If Sametime cannot automatically convert your file type, you must use Sametime Print Capture to convert the file. Once you have converted the file, return to step 1 and attach the converted FST file.

If Sametime Print Capture is not installed on your computer, click the link to download Sametime Print Capture. After downloading Sametime Print Capture, you must install it and restart your computer. Once your computer restarts, you can convert the file with Sametime Print Capture, return to the meeting, and attach the converted FST file.
Note Each file that you attach to the whiteboard must have a unique name. You cannot attach two files with the same name to a meeting.

4. Click OK. The file appears on the whiteboard. People can also access the file from the Meeting Details page in the Sametime Meeting Center.

5. Repeat steps 1-4 until you have attached all the files that you want to display on the whiteboard. The most recently attached file appears first on the whiteboard.

Note If you are having difficulty attaching a file, the Sametime Meeting Center might have run out of storage space. Contact your system administrator for assistance.

Conducting an Audio Meeting

When a meeting includes computer audio and video, the Moderator can:

- Switch the audio mode from Automatic Microphone to Request Microphone.
- Pass the microphone (when in Request Microphone mode).

Switching the Audio Mode

All online meetings that include computer audio begin in Automatic Microphone mode. You might want to switch to Request Microphone mode when:

- You are moderating a large meeting in which only a few people need to speak.
- Your meeting does not include much interactive discussion.
- Your meeting includes very structured turn-taking when people speak.

To switch to Request Microphone mode, choose Tools - Audio - “Switch to Request Microphone.” Everyone in the meeting must now request the microphone before speaking. To return to Automatic Microphone mode, choose Tools - Audio - “Switch to Automatic Microphone.”

Passing the Microphone

During meetings that use the Request Microphone mode of computer audio, the Moderator can pass the microphone from the current speaker to the next speaker who has requested it. The Moderator might pass the microphone if the current speaker:

- Leaves the meeting without releasing the microphone.
- Is unsure how to release the microphone.
Exceeds a time limit for a speech.

- Is causing persistent audio problems for other participants. For example, the current speaker’s computer might be generating noise that causes audio problems for others. See “Troubleshooting Audio and Video During a Meeting” for more information about resolving audio problems.

To pass the microphone, choose Permissions - “Give Microphone to Next Person.” The next person who is waiting to talk receives the microphone. If no one else has requested the microphone, the microphone is simply revoked from the current speaker.

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**Monitoring the Length of the Meeting**

During a meeting, the Moderator can monitor the length of the meeting to ensure that it does not end before the participants have concluded their business or continue after all the participants have left. For example, the Moderator can extend the meeting for half an hour or end the meeting if the participants have concluded their business sooner than expected.

Although the Moderator controls the meeting duration, the system administrator can choose to automatically extend all Sametime meetings by a designated length of time. If the administrator does not automatically extend all meetings, your meeting will end at the designated time, and you will lose any unsaved meeting information (such as an annotated whiteboard file). To prevent this situation, the Moderator can extend the meeting duration using the procedure below.

**Changing the Duration of the Meeting**

The Moderator can lengthen or shorten the meeting at any time during the meeting.

1. Choose Meeting - Change Duration.
2. Change the duration of the meeting. You might see any of the following controls:

   - A Duration field with double and single arrows on either side. Use the double arrows to change the length of the meeting in increments of an hour. Use the single arrows to change the length of the meeting in increments of 15 minutes. You can also enter the duration directly in the Duration field.
Separate fields for hours and minutes. Use the arrows next to the “hours” field to change the length of the meeting in increments of one hour. Use the arrows next to the “minutes” field to change the length of the meeting in increments of fifteen minutes. You can also enter the duration directly in the “hours” and “minutes” fields.

3. Click OK.

Note If your meeting includes a telephone conference call, the duration of the call is not changed when you change the duration of the meeting.

Ending the Meeting

The Moderator can end the meeting for all participants by choosing Meeting - End Meeting at any time during the meeting. The meeting ends immediately for all participants, and the Meeting Room closes.

A meeting does not automatically end when the Moderator leaves. If only one person has moderated a meeting, the meeting continues without a Moderator when the Moderator leaves. Participants are then unable to control many aspects of the meeting. To prevent this situation, the Moderator should always select another Moderator before leaving the meeting. See “Moderating a Meeting” for more information.

Note If your meeting includes a telephone conference call, the call does not automatically end when you end the meeting. The call continues until the scheduled end time for the meeting unless you manually end the call in a separate procedure.

Switching the Moderator

If you are the Moderator, you can give Moderator duties to another participant. After you switch to another Moderator, you can no longer:

- Send polls.
- View unshared poll responses or individual poll responses.
- Send Web pages.
- Save or attach whiteboard files during the meeting.
- Grant and remove permissions from other meeting participants.

Note If more than one person has been the Moderator of a meeting, the most recent Moderator is the only Moderator who can edit or delete the meeting when it is finished.

To switch the Moderator:

1. Select the new Moderator's name in the Participant List.
2. Choose Permissions - Switch Meeting Moderator.
3. Click Yes on the Switch Moderator dialog box. The participant whom you selected is now the Moderator.

**Note**
The new Moderator can confirm his or her status by looking for the Moderator icon next to his or her name in the Participant List details or by clicking the status details button to read the text in the Status Details dialog box.

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### Sending Information to Participants

The Moderator is often the main presenter in a meeting. For example, you might present a file on the whiteboard or share your screen during the meeting. Although anyone with permission to edit/share can present information in a meeting, only the Moderator can send Web pages and polls to the meeting participants. See the following topics for more information:

- “Sending Web Pages”
- “Sending Polls”
- “Viewing and Sharing Poll Responses”

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### Sending Web Pages

The Moderator can use the Web Pages tab to direct meeting participants to specific Web pages. For example, the Moderator might send a Web page to meeting participants so that they can review a new design for the company’s Web site. Only the Moderator can send Web pages.

When the Moderator sends a Web page, a new browser window containing the Web page appears on each participant’s computer screen. The Moderator does not control this window. Each participant can explore the Web page, go to a different Web page, or close the window without affecting what other participants see during the meeting.

If the Moderator sends multiple Web pages to the meeting participants, subsequent pages replace each other within the single browser window on participants’ screens. Participants receive only one browser window.

**Note** Once the Moderator has sent a Web page, any participants who subsequently join the meeting will receive the most recent Web page as soon as they join the meeting.
Send a Web Page

Follow these steps to send a Web page to the meeting participants:

1. Prepare participants for the new window that will appear on their screens by explaining that you are sending a Web page to them.

2. Click the Web Pages tab. (If the tab is not visible, choose View - Interaction Tabs - Web Page Tab.)

3. Enter the address (the Uniform Resource Locator, or URL) of the Web page that you want to send.

4. (Optional) To view the Web page privately before you send it to the meeting participants, click Preview. The Web page appears in a new browser window on your screen. Other participants cannot see the page yet.
   - If the page is correct, close the preview window and proceed to step 5.
   - If the page is not the one you want, type a new address in the browser window or search until you find the correct page. After you find the correct Web page, copy the address from your browser window and paste the address into the Web Pages tab.

5. Click Send. The Web page appears in a new browser window on each participant’s computer screen. (The page also appears in a new browser window on the Moderator’s screen.)

Tip To resend a previous Web page, select the address from the “Web page to send” drop-down list on the Web Pages tab. You can send the Web page right away by clicking Send, or you can edit the address first.

Sending Polls

During Sametime meetings, the Moderator can use polls to gather feedback from meeting participants. The Moderator can send a question to the meeting participants and view participants’ responses. For example, the Moderator might ask participants to vote on which job applicant to hire. As participants respond, the Moderator sees which candidate the participants prefer.

Note It is not possible to prepare poll questions in advance. You must create the poll questions during the meeting.

When sending a poll, the Moderator can also:
• **Share the tallied responses with other participants.** Normally, the Moderator is the only person who sees the poll responses. The Moderator can choose to share the tallied poll responses so that all participants see the responses in the Poll Tab. Once you share the responses, they are visible to everyone for the rest of the meeting. You cannot stop sharing the responses.

  **Note**  When the Moderator shares the responses, participants see only the tallied responses. Participants do not see individual answers to the poll.

• **Allow anonymous responses.** By default, the Moderator can see each participant’s response to the poll question. (These individual responses cannot be shared with other meeting participants.) The Moderator can preserve participants’ privacy by allowing them to respond anonymously to poll questions.

• **Mark correct answers.** The Moderator can specify correct answers for poll questions. When the Moderator shares the poll responses, participants can see if they answered the question correctly.

  **Note** Only the Moderator can send polls. During broadcast meetings, audience members can see poll questions, but they cannot respond. Only presenters can respond to poll questions during broadcast meetings.

**Sending a Poll**

Follow these steps to send a poll question to the meeting participants:

1. Click New on the Poll Tab, or choose Tools - “Poll the Meeting Participants.”
2. Select the type of question from the drop-down list. Depending on the type of question you select, some answers might be filled in automatically. For example, if you select a True/False question, the answers True and False automatically appear. You can edit these automatic answers if you like.
3. Enter your question in the “Question text” area.
4. If necessary, enter the answers to the question.
5. (Optional) If you want to mark the correct answers, select the check box or radio button next to the correct answers. You see the answers marked as correct when you view or share the poll responses. Participants do not see the correct answers until you share the poll responses.

  **Note**  By default, you can select only one correct answer. If you want to select multiple correct answers, you must complete step 6, and then return to step 5 and select the correct answers.
6. (Optional) By default, participants can pick only one answer per question. To allow participants to select more than one answer per question, select “Allow participants to choose multiple answers.”

7. (Optional) If you want participants’ answers to remain anonymous, select “Responses are anonymous.”

   **Note** If responses are anonymous, you cannot see the names of the respondents when you view individual poll responses.

8. Click Send. A new window containing the question and answers appears on the other participants’ computer screens. (You cannot respond to polls that you send.)

   **Tip** To resend a previous question, select the question from the “Questions asked” drop-down list in the New Poll dialog box. The question and answers automatically appear. You can send the new question and answers right away by clicking Send, or you can edit them first. If you resend a question, the new responses are tallied separately from the original responses to the question.

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**Viewing and Sharing Poll Responses**

Participants’ responses to poll questions are tallied in the Moderator’s Poll Tab. The Moderator has access to two types of poll responses:

- **Tallied Responses**: View the tallied responses if you want to see a breakdown of the poll results. For example, you might view the tallied responses to see that 85% of the participants chose answer B. The Moderator can keep these responses private or share them with other meeting participants.

- **Individual Responses**: View individual responses if you want to see how a particular participant answered a poll question. The Moderator cannot share the individual responses with other meeting participants.

**Viewing and Sharing Tallied Poll Responses**

- **Viewing**: Select a question from the “Questions asked” drop-down list on the Poll Tab. The tallied responses automatically appear. If the Moderator specified correct answers, they are indicated by check marks.

- **Sharing**: Select a question in the “Questions asked” drop-down list on the New Poll Tab, and then click “Show Responses to Everyone” in the Poll Tab (or choose Tools - Show Responses to Everyone). Meeting participants see the responses in the Poll Tab. During broadcast meetings, only presenters can view the shared poll responses.

   **Caution** Once you share the responses, they are visible to everyone for the rest of the meeting. You cannot stop sharing the responses.
Viewing Individual Poll Responses

The Moderator can see individual participants’ responses but cannot use the polling feature to share these responses with other meeting participants.

**Note** It is possible to show the individual responses to other participants by sharing your screen. However, you should not attempt to share the individual responses in most cases. Participants expect their individual responses to remain private.

To view individual responses:

1. Select a question from the “Questions asked” drop-down list on the Poll tab.

2. Click View Individual Responses or choose Tools - View Individual Responses. The View Individual Responses dialog box appears. Each participant’s name and answer appears. If the Moderator specified correct answers, they are indicated by check marks.

**Note** If the Moderator selected “Responses are anonymous” when creating the question, the names of the respondents are not available, but you can still view the answers.

3. (Short answer questions only) Select a name from the list. The participant’s response appears below the list. (If the responses are anonymous, select an answer from the list. The complete text of the answer appears below the list, but no name is visible.)

4. When you are finished viewing the individual responses, click Close.
Chapter 9: Finishing a Meeting

Before leaving a meeting, ask the Moderator if any meeting information is available for review after the meeting is over. For example, you might be able to see an annotated whiteboard file or watch a recording of the meeting. To view information about a finished meeting, you must view the meeting details for the meeting.

See the following topics for more information:

- “Saving Meeting Information”
- “Viewing Saved Meeting Information”
- “Working with a Recorded Meeting”
- “Listening to a Recorded Telephone Conference Call”

Saving Meeting Information

During a meeting, any participant can save the meeting chat transcript on his or her own computer. In addition, the Moderator can save a whiteboard file as an attachment to the meeting details.
Saving a Chat Transcript

You can save a chat transcript from an instant chat meeting or from a meeting that occurs in the Meeting Room. (A public chat conversation that occurs in the Meeting Room is known as a Meeting Room chat.)

**Note** You must save the transcript while the meeting window is open.

Saving a Transcript from an Instant Chat Meeting
1. In the meeting window, choose Meeting - Save As.
2. (Optional) Change the default file name and location.
   **Note** The default location is the C:\Program Files\Lotus\Sametime Client\Chat Transcripts directory. The default filename includes the message topic, the date and time started, and the TXT extension. (For example: “Tuesday Status Meeting.021500PM.txt.”) If you rename the file, be sure to use the TXT extension.
3. Click Save.
   **Note** Sametime Connect for browsers cannot save chat transcripts. See “Determining Which Version of Sametime Connect You are Using” for more information.

Saving a Transcript from a Meeting That Occurs in the Meeting Room
1. In the Meeting Room, choose Meeting - Save - Meeting Room Chat.
2. (Optional) Change the default file name and location.
   **Note** The default location is the C:Windows\Java\Sametime directory. The default filename includes the message topic, the date and time started, and the TXT extension. (For example: “Tuesday Status Meeting.021500PM.txt.”) If you rename the file, be sure to use the TXT extension.
3. Click Save.

Saving a Whiteboard File

During a meeting, the Moderator might want to save a whiteboard file so that others can view it when the meeting is over. For example, if someone has presented a file on the whiteboard, and several participants have annotated the file, the Moderator can save the changed file as an attachment to the meeting details. The Moderator can also save a file that was created on the blank whiteboard.

**Note** You cannot save a whiteboard file in an instant meeting.

Sametime saves whiteboard files in two formats: RTF (for viewing in a word-processing program) and SWB (a whiteboard file, for viewing in a Sametime meeting). If you want to attach the saved file to another meeting, use the SWB version of the file.

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Note For best results, view the RTF file in Microsoft Word.

To save a whiteboard file:

1. Make sure the file you want to save is displayed on the whiteboard.
2. Click Save in the whiteboard toolbar or choose Meeting - Save - Whiteboard. A confirmation dialog box appears.
   
   Note If the file was previously attached to the meeting, the saved file names are Filename_Annotated.rtf and Filename_Sametime.swb. If the file was created using the blank whiteboard, the saved file names are Whiteboard.rtf and Whiteboard_Sametime.swb.
3. (Optional) If you want to view the file immediately, click “Access Saved Whiteboard.”
4. The file is attached to the meeting details. The original version of the file is not overwritten; you can still view it from the Meeting Details page.

Note You cannot save your whiteboard presentation in its original file format. For example, if you attach a Lotus 1-2-3 file to the whiteboard, you cannot edit and save the changes in Lotus 1-2-3 format. If you must save your edits in the original file format, use screen sharing to edit and save the file.

Leaving a Meeting

To leave a meeting, choose Meeting - Leave Meeting. Your Meeting Room closes, but other participants can continue with the meeting. (You can also leave the meeting by clicking the “X” button at the top of the Meeting Room.) If the meeting includes a telephone conference call, remember to hang up the telephone to leave the conference call.

Tip If you are sharing your screen in a meeting, be sure to stop sharing before you leave the meeting. If you are the Moderator and you want to save a whiteboard file, be sure to save the file before leaving.

If the Moderator Leaves the Meeting

If you are the Moderator and you decide to leave the meeting, you should choose another Moderator before you leave. If the Moderator leaves without switching to a new Moderator, the meeting continues without moderation. Participants without permissions cannot get permissions in a meeting without a Moderator.

Meeting Details for a Finished Meeting

After the meeting is finished, you can still see the meeting details, unless the meeting creator or Moderator has deleted them.
To see the meeting details for a finished meeting:

- If your Meeting Center includes a Details column above the list of meetings, click the meeting details icon next to the appropriate meeting. If the meeting was protected by a password, you need to enter the password to see the meeting details.
- If your Meeting Center does not include a Details column above the list of meetings, click Finished to see a list of finished meetings, and then click the meeting name. If the meeting was protected by a password, you need to enter the password to see the meeting details.

**Viewing Saved Meeting Information**

After a meeting is over, you can find any saved whiteboard files on the Meeting Details page. If you saved a chat transcript from the meeting, you can find it in a directory on your computer.

*Note* You can also use the Meeting Details page to review other information about the finished meeting. For example, you can view a recorded meeting or listen to a recorded telephone call.

**Viewing Saved Chat Transcripts**

If you saved a chat transcript from the meeting, you can read it by locating the file on your computer and double-clicking it or by opening any word-processing program and then opening the chat transcript file. The default location for the file is the `C:\Program Files\Lotus\Sametime Client\Chat Transcripts` directory for instant chat meetings and the `C:\Windows\Java\Sametime` directory for meetings that occur in the Meeting Room.

**Viewing Whiteboard Files**

When you create a meeting, you can attach a file for display on the whiteboard. During the meeting, participants can annotate, or change, the file. The Moderator can then save the changed file. The file is saved in two formats (RTF for quick viewing; SWB for whiteboard display). The Moderator can also save a presentation that was created on the blank whiteboard.

You can view whiteboard files in all three formats (the original format, RTF, and SWB) on the Meeting Details page in the Meeting Center.
To view whiteboard files:

1. Click the meeting name in the Meeting Center. If your Meeting Center includes a Details column above the list of meetings, you can also click the meeting details icon.

2. Scroll to the bottom of the Meeting Details page until you see the Attachments heading. The three types of whiteboard files are:

   - **Whiteboard Attachments**: Files that the meeting creator attached to the meeting. These files are in their original format or, if the files were attached using Print Capture, in FST format. For example, if you attach a Lotus Word Pro file named Proposal.lwp when creating the meeting, the file appears on the Meeting Details page as Proposal.lwp.

   - **RTF Files**: Files that you can view in an appropriate program, such as a word processor. If the Moderator makes changes to Proposal.lwp on the whiteboard during a meeting and then saves the file, the file appears as Proposal_Annotated.rtf on the Meeting Details page. If the Moderator saves a presentation that was created on the blank whiteboard, the filename is Whiteboard.rtf.

   - **SWB Files**: Files that you can save to your computer and then attach to another meeting. If the Moderator makes changes to Proposal.lwp on the whiteboard during a meeting and then saves the file, the file appears as Proposal_Sametime.swb on the Meeting Details page. If the Moderator saves a presentation that was created on the blank whiteboard, the filename is Whiteboard_Sametime.swb.

3. Do one of the following:
   - To view the file in a word-processing program, double-click the file with the RTF extension. An appropriate program (such as Microsoft Word) launches and displays the file.
   - To save a file on your computer, right-click on the file and choose Copy from the shortcut menu. Open the file management system on your computer (such as Windows Explorer), right-click, and choose Paste to paste the file into a directory on your computer. You can save either version of the file (the RTF version or the SWB version).

   **Tip** You might want to save the SWB version of the file if you plan to attach the file to a meeting and display it on the whiteboard. You can save the SWB version of the file to your computer by double-clicking the file and choosing “Save this file to disk.”

Chapter 9: Finishing a Meeting 241
Working with a Recorded Meeting

If the person who created a meeting chose to record the meeting, you can view the recorded meeting from the Meeting Details page after the meeting is over.

In addition to viewing the recording, the creator of the meeting, the Moderator, and the system administrator can:

- Delete the recorded meeting.
- Export the recorded meeting.
- Replace the recorded meeting.

All other participants can only view the recording.

**Note** Your version of Sametime might allow the administrator to import a recorded meeting to a specific server. For example, an administrator can import a recorded meeting to the server www.sametime.com. You can then enter www.sametime.com in your browser and view the recording of the meeting, even if the meeting took place on a different server.

Viewing a Recorded Meeting

If the person who schedules a meeting chooses to record the meeting, you can view a recording of the meeting after it is over. You might want to view a recording if you were unable to attend part or all of the meeting or if you want to review the meeting.

**Available Features**

A recorded meeting does not include all of the features of the original meeting. For example, you cannot see the Participant List from the original meeting while watching a recorded meeting. The table below lists the features that are available in a recorded meeting.

**Note** Because some features are unavailable for recorded meetings, the recording is often not identical to the original meeting. The recording might also differ from the original meeting because the sampling rate of recording is sometimes slower than the rate of the actual meeting. This situation can cause the recorded meeting to lose some information that was available in the original meeting. (This data loss is usually minor.) Data loss is particularly common when the creator of the original meeting selects the “People are attending using a modem” check box on the Locations tab of the New Meeting page when creating the meeting.
### When viewing a recorded meeting, you can... | However, you cannot...
---|---
Listen to computer audio and watch computer video from the meeting. | Use the Sametime Meeting Room to listen to the audio from a recorded telephone conference call. If your meeting included a recorded telephone conference call, you can listen to it separately.
Watch any information that was shared using screen sharing. For example, you can see a shared program and watch others edit a file in the program. | See the mouse pointer in a shared program.
Watch a whiteboard presentation. For example, you can see a file that was presented on the whiteboard and watch others edit the file with the whiteboard tools. | See the whiteboard Pointer Tool. For example, if the Moderator points to a graph on the whiteboard with the Pointer Tool, you can see the graph, but you cannot see the Pointer Tool.
Use the replay controls to play, pause, and stop the meeting. You can also make changes to the Meeting Room, such as changing the Meeting Room layout, adjusting the speaker volume, and floating the video windows. | Interact with the recording during the meeting by answering questions or making changes to the shared information.
See any of the following information from a meeting:
- Chat text
- Sent Web pages
- Poll questions | See any of the following information from a meeting:
- Raised hands
- A list of people in the meeting (the Participant List)

**Tip** You might be able to see a list of the meeting participants on the Meeting Details page for the recorded meeting.

### Note
You might have problems viewing a recording while using a modem. Someone who is using a modem cannot view a meeting that was recorded using a fast connection.

#### Viewing a Recording
1. Locate the meeting in the Recorded view, the Finished view, or the Calendar view of the Meeting Center, and click on the meeting name. The meeting details appear. Click “Replay the Meeting.” If necessary, enter the password for the recorded meeting. A new window appears and the meeting begins.

2. While viewing the meeting you can:
   - Use the replay controls as necessary to play, pause, stop, and move through the meeting.
   - Change the Meeting Room layout.
• Adjust the audio volume of the meeting.
• Float the video windows so that you can view the video in a separate browser window.
• Display Web pages and polls in new windows.
• Work with chat text.
• View available status messages.

3. When you are finished watching the meeting, choose Meeting - Leave Meeting.

**Note** To view a recording, you might need to go to the server where the meeting was created. See your system administrator for more information.

**Using the Replay Controls**
The table below lists the replay controls and their functions.

<table>
<thead>
<tr>
<th>Replay Control</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Play button</td>
<td>• Allows you to watch and listen to the meeting.</td>
</tr>
<tr>
<td></td>
<td>• You can also choose Tools - Play.</td>
</tr>
<tr>
<td>Pause button</td>
<td>• Pauses the meeting.</td>
</tr>
<tr>
<td></td>
<td>• You can also choose Tools - Pause.</td>
</tr>
<tr>
<td></td>
<td>• To resume the meeting, you must click Play.</td>
</tr>
<tr>
<td>Stop button</td>
<td>• Stops the meeting and rewinds it to the beginning.</td>
</tr>
<tr>
<td></td>
<td>• You can also choose Tools - Stop.</td>
</tr>
</tbody>
</table>

*continued*
Replay Control | Function
---|---
Progress Bar | • Allows you to move quickly through parts of the meeting.
• Move the slider bar to the right to move forward. As you move the slider, watch the “elapsed time” indicator below the slider or in the status bar to see how much of the meeting has passed.
• If the meeting is playing as you move the slider, the meeting is paused; when you release the slider, the meeting resumes. (You might notice a brief pause before the meeting resumes.)

Tip You can also choose Tools - Fast Forward or Tools - Rewind. Continue selecting either of these menu items to move through the recording in increments of five seconds.
• If you have stopped or paused the meeting when you are using the slider, you must click Play to resume the meeting.

Note When you move the slider, you cannot watch or listen to the meeting. You must release the slider for the meeting to resume.

Change the Meeting Room layout
Use the View menu to arrange the Meeting Room to suit your needs. You can view or hide the audio/video column, the Interaction Tabs (for chat, send Web pages, and Polls), and the audio controls. You can also fit the shared area to the window, and maximize the shared area.

Adjusting the Audio Volume
If the meeting includes computer audio and video, you can use the Volume slider bar (which appears below the video windows) to adjust the audio volume. Move the bar to the right to increase the volume. You can also choose Tools - Increase Speaker Volume or Tools - Decrease Speaker Volume. Continue selecting either of these menu items to increase or decrease the speaker volume in small increments.

Tip To hide the Volume control and the video windows, choose View - Audio/Video Column to remove the check mark. Choose View - Audio/Video column again to see the windows and the Volume control.
Floating the Video Windows

To view Sametime video in a separate browser window, you can “float” the video windows to separate them from the Meeting Room. To float the video windows, click the Float Video Windows button or choose View - Float Video Windows. When the video windows are floating, you can move them anywhere on your computer screen. To return the video windows to the Meeting Room, click the Float Video Windows button again or choose View - Float Video Windows to remove the check mark.

Display Web Pages and Polls in New Windows

Choose View - “Display Web Pages and Polls in New Windows” to display new questions in a separate dialog box and new Web pages in a separate browser window. If you are already viewing a Web page or question in a new window, the window switches to display the new content. For example, if you are viewing a Web page in its own browser window and the Moderator has sent a new Web page, your browser window automatically switches to the new Web page.

Note Tallied poll responses are not displayed in a separate window. You must view responses on the Poll tab.

Viewing Status Messages

You can view the status of the meeting as you view it by looking at the status bar at the bottom of the meeting window. The status bar lists the following information:

- The current state of the recorded meeting (loading, playing, paused, stopped, finished)
- The elapsed time or the time remaining. To view the elapsed time, choose View - Elapsed Meeting Time. Choose View - Remaining Meeting Time to view the remaining time.
- Whether the replay of the meeting is encrypted (or secure). A locked padlock in the status bar indicates that the replay is encrypted. (By default, a recorded meeting is encrypted if the original meeting was encrypted.)
- Whether you have missed any meeting information.
- Whether there is new content in one of the Interaction Tabs (such as a new Web page in the Web pages tab).
Working with Chat Text
While viewing a recorded meeting, you can select, copy, and save the chat text from the meeting.

Tip While viewing the meeting, the Interaction tabs might flash briefly to alert you to new content, such as shared poll responses or chat messages.

Loss of Information
When viewing a recorded meeting, you might notice any of the conditions listed below. Unfortunately, these conditions are a normal part of recorded meetings.

- The audio might cut out for a couple of seconds, so that you do not hear what someone in the meeting says. (If the audio cuts out for more than a couple of seconds, you might be experiencing audio difficulties.)
- The video might pause for up to 15 seconds, so that you do not see a new image, or you do not see the person who is currently speaking move. (If the video pauses for longer than 15 seconds, you might be experiencing video difficulties.)
- The whiteboard or screen-sharing presentation might appear to pause, so that you do not receive any new information. This situation can last up to 45 seconds; after that time, you will begin receiving information again. If you do not receive information for longer than 45 seconds, try pausing the video. When you pause the video, you free up network bandwidth so that you can receive more meeting information from the server.
- You might not receive 100 percent of the chat text, sent Web pages, or polls in a meeting.

Tip The status bar displays messages about lost information. If you lose some chat text, the chat area in the Meeting Room includes a message about the lost text.

Deleting a Recording of a Meeting
The creator of a meeting, the Moderator, and the system administrator can delete a recording of a meeting. Deleting a recording removes the recording from the Meeting Details page. All of the information about the meeting, including any whiteboard files for the meeting, remains available. To delete other information, you must delete the meeting.

Tip Before deleting a recording, you might want to export it (save it to your own computer). Your version of Sametime might not allow you to export a meeting. See your system administrator for more information.
To delete the recording:

1. Do one of the following:
   - If your Meeting Center includes a search feature, you can search for the meeting. Enter the meeting name or Moderator name, choose Recorded Meetings in the drop-down box, and click Search. You can also click the Recorded link under the calendar to view all recorded meetings. When you locate the meeting, click the meeting details icon to go to the Meeting Details page. Do not click the meeting name; clicking the meeting name starts the recording.
   - If your Meeting Center does not include a search feature, locate the meeting in the Recorded view, the Finished view, or the Calendar view and click on the meeting name. The meeting details appear. Click “Replay the Meeting.” If necessary, enter the password for the recorded meeting. A new window appears and the meeting begins.

2. Click “Delete the Recording.”

3. Click OK to confirm that you want to delete the recording. The recording is removed from the Meeting Details page.

---

**Exporting (Saving) a Recording of a Meeting**

If you are the creator of a meeting, the Moderator, or the system administrator, you can export (save) a recording of a meeting to your computer. You might want to export a meeting if you have a tool that allows you to edit the meeting or if you want to save the meeting on your computer before deleting it.

**Note** Your version of Sametime might not allow you to export a recording. See your system administrator for more information.

To export a recording:

1. Click on the meeting name in the Meeting Center. (You can find the meeting in the Recorded view, the Finished view, or the Calendar view.)

2. Click “Export the Recording.”

3. Do one of the following:
   - If you are using Microsoft Internet Explorer as your browser, choose “Save this file to disk” in the File Download dialog box. Click OK.
   - If you are using Netscape Communicator as your browser, click Save File in the Unknown File Type dialog box.

4. In the Save As dialog box, locate or create the folder you want to use to store the recorded meeting.
5. (Optional) Change the name of the recording in the “File name” field. By default, the file name is a number; you might want to use a name that is similar to the name of the original meeting.

6. Click Save. The recording is saved on your computer.

**Note** You must use the Meeting Details page of the Sametime Meeting Center to view the meeting. You cannot view the meeting by double-clicking the file name in your computer’s file system.

---

**Replacing a Recording of a Meeting**

The creator of a meeting, the Moderator, and the system administrator can replace a recording with another file. This feature is helpful if a recorded meeting is damaged and you want to replace it with an undamaged copy of the meeting. To ensure that you have an undamaged copy of the recording, you should export the recording to your computer.

You can also replace a recording with an edited version of the recording. Currently, you cannot edit a recorded meeting using Sametime. If you want to edit a recorded meeting, ask your system administrator if your company has any tools for editing recorded Sametime meetings. Your system administrator might have created or bought a tool that allows you to edit a recorded Sametime meeting.

**Tip** Before replacing a recording, you might want to export the recording (save it to your computer). When you replace a recording, the original recording is deleted, and you cannot retrieve it.

**Note** Your version of Sametime might not allow you to export or replace a recording. See your system administrator for more information.

To replace a recording:

1. Click on the meeting name in the Meeting Center. (You can find the meeting in the Recorded Meetings view, the Finished view, or the Calendar view.) The meeting details appear.

2. Click “Replace the Recording.” In the Replace Recorded Meeting dialog box, browse to locate the recorded meeting file that you want to use to replace the current recording.

   **Note** The file must have an RAP extension (the extension for a Sametime recorded meeting file). If you do not use a file with an RAP extension, no one can view the recording.

3. Click OK. The edited version of the recording replaces the original recording on the Meeting Details page.
Listening to a Recorded Telephone Conference Call

If your meeting includes a telephone conference call and the call was recorded, you can listen to the recorded call after the meeting ends. To access the recorded call, dial the telephone number for the meeting and enter the telephone conference call meeting ID and, if required, the password.

To find out if a call has been recorded, look at the meeting details page for the online meeting or ask the Meeting Moderator. If the call includes a password, be sure to obtain it from the Moderator before accessing the recording.

**Note** You can use Sametime to schedule a telephone conference call only if your Sametime server includes this capability. See your system administrator for more information.
Chapter 10: Using Sametime Discussions and TeamRooms

Discussions and TeamRooms allow you to keep track of your business discussions online. In both Discussions and TeamRooms, you can create documents so that others can read and respond to them. You can also update your own documents and view comments from others. While working in a Discussion or TeamRoom, you can use Sametime to chat with others who are working in the same Discussion or TeamRoom.

Although Discussions and TeamRooms both provide a public forum for you to discuss projects with your coworkers, they have distinctly different purposes. Use a Discussion when your primary purpose is to provide a public forum for business discussions, but you do not need to manage a specific project. For example, a Marketing department might use a Discussion to keep track of ideas about an upcoming conference, a new product, and the latest advertising campaign. For more information about Discussions, see “Using a Discussion” later in this chapter.

Use a TeamRoom to keep track of the details for a specific project. For example, a Marketing department might use a TeamRoom to enter the names of team members who are working on a project, deadlines for the project, and due dates for assignments related to the project. For more information about TeamRooms, see “Using a TeamRoom” later in this chapter.

**Note** Your version of Sametime might not include Discussions and TeamRooms. See your system administrator for more information.

Common Procedures

Discussions and TeamRooms have some things in common. For example, you can use the same procedure to enter text in a Discussion or TeamRoom document. The procedures below apply to both Discussions and TeamRooms:

- “Creating a Discussion or TeamRoom”
- “Entering Text”
- “Chatting with Others”
- “Searching for Information”
- “Leaving a Discussion or TeamRoom”
- “Deleting a Discussion or TeamRoom”
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- “Creating a Discussion or TeamRoom”
- “Entering Text”
- “Chatting with Others”
- “Searching for Information”
- “Leaving a Discussion or TeamRoom”
- “Deleting a Discussion or TeamRoom”
Creating a Discussion or TeamRoom

To create a Discussion or TeamRoom:

1. On the Sametime Welcome page, click the “Use Discussions and TeamRooms” link.
2. Enter your user name and password. You can obtain your user name and password from the system administrator or create your own through registration.
3. Click Create Your Own.
4. Enter a title for the Discussion or TeamRoom.
5. Enter a file name for the Discussion or TeamRoom.
6. Do one of the following:
   - **To create a Discussion**, select “Sametime Discussion - Notes & Web (R5.0).” Select a Discussion if you want to create a public forum for business discussions but do not need to manage a project for a team of people.
   - **To create a TeamRoom**, select “Sametime TeamRoom (5.0).” Select a TeamRoom if you have a project that you need to track online. TeamRooms allow you to enter information about people who are working on the project, deadlines for the project, and issues and tasks related to the project.
7. (Optional) To create an index of all the significant words in your Discussion or TeamRoom, select the check box next to “Create full-text index for searching.” (Words like “the” and “of” are not included.) A full-text index is helpful when searching the Discussion or TeamRoom for a specific word or phrase.
8. Click Create. If a security warning appears, click Yes.
9. Click Back to return to the Sametime Programs page. You might need to click the Refresh button in your browser to see your Discussion or TeamRoom.

Entering Text

You can use a text edit box to enter text in the following documents:

- A new topic or response in a Discussion
- A team document in a TeamRoom
- A team or subteam status report in a TeamRoom
In each of the documents listed above, the text edit box is labeled differently. For example, it is the “Report” box for a TeamRoom status report and the “Content” box for a Discussion topic. However, both the box itself and the buttons you can use to edit the text are identical for all documents.

To enter text in a text edit box, type the text in the box and use the buttons above the box to format the text and to create links to Web sites. The table below lists and describes the buttons you can use to edit text. (Use the drop-down boxes above the text edit box to choose a color, font size, and font type for your text.)

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>**</td>
<td>Makes text bold</td>
</tr>
<tr>
<td>*</td>
<td>Makes text italic</td>
</tr>
<tr>
<td>_</td>
<td>Underlines text</td>
</tr>
<tr>
<td></td>
<td>Aligns text to the left, right, or center of the text edit box</td>
</tr>
<tr>
<td></td>
<td>Indents a paragraph within the text edit box</td>
</tr>
<tr>
<td></td>
<td>Creates a bulleted list within the text edit box</td>
</tr>
<tr>
<td></td>
<td>Creates a link to a Web site. Select the text and then enter the appropriate Web site link in the box that appears to the right of the link button.</td>
</tr>
<tr>
<td></td>
<td>Allows you to enter international characters. You must know the Unicode value for the characters you want to enter. Enter the Unicode value in the box to the right of the international button, and then click the check mark button.</td>
</tr>
</tbody>
</table>

**Chatting with Others**

When you are using a Discussion or TeamRoom, you can use Sametime to chat with:

- Anyone who is using the same Discussion or TeamRoom that you are using.
- Anyone who is viewing the same Discussion or TeamRoom document that you are viewing. (For example, you can chat with someone who is reading the same topic in a Discussion that you are reading.)
- The author of a document in a Discussion or TeamRoom. You can chat with the author of a document as long as the author is online in Sametime; the author does not need to be currently viewing the document.
**Note**  The only kind of meeting that you can start from Discussions and TeamRooms is a chat meeting.

**Seeing Who is Available to Chat**

The names and status of the people viewing the same Discussion or TeamRoom (or the same document within the Discussion or TeamRoom) are listed in the Participant List at the bottom right of the window. If you are viewing the Discussion or TeamRoom from the Web, use the tabs above the chat pane to switch between the Discussion or TeamRoom and document views.

**Chatting with the Author**

If the author is online, the author's name is displayed in bold green.

1. Double-click the author's name.
2. Enter your message in the floating chat window and click Send. The message is displayed in the chat-transcript area of the author’s floating chat window.

**Chatting with All Participants**

1. Select a tab in the chat area at the bottom of the document, Discussion, or TeamRoom. (You can chat with participants who are viewing the document you are viewing or who are using the Discussion or TeamRoom.)
2. Enter your message in the text-entry area at the bottom of the window.
3. Click Send. The message appears in the chat-transcript area and is seen by all participants.

**Chatting with Selected Participants**

1. Select a tab in the chat area at the bottom of the document, Discussion, or TeamRoom. (You can chat with a participant who is viewing the document you are viewing or who is using the Discussion or TeamRoom.)
2. In the Participant List, double-click a name, or press CTRL to select more than one name. Choose Message from the shortcut menu.
3. Enter your message in the floating chat window and click Send. The message is displayed in the selected participant's private floating window.

**Searching for Information**

To search Discussion or TeamRoom documents for specific information:

1. Click Search at the top of the main Discussion or TeamRoom page.
2. Enter the words or phrases you want to find.

3. (Optional) Use the drop-down menu to select an option for sorting your search results.
   - **Relevance:** This is the default option. Search results will be sorted in order of most to least relevant.
   - **Last modified:** This option sorts search results beginning with the most recent document.
   - **First modified:** This option sorts search results beginning with the oldest document.
   - **Keep current order:** This option sorts search results in the order that they are found.

4. Select the maximum number of results you want to see.

5. (Optional) Select the “Use word variants” check box. If you select this option and search for the word “cat,” documents containing words like “cats” will also show up in your search results. If you want to search specifically for “cat” and not for “cats,” leave this check box blank.

6. (Optional) Select the “fuzzy search” check box. This option returns words that are similar to the words in your search and is helpful if you are unsure of the correct spelling of your search terms.

7. Click Search in the top right corner of the page.

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**Leaving a Discussion or TeamRoom**

When you are finished working in a Discussion or TeamRoom, you can leave it by entering the name of your server in your browser. (Your server name is the same name you entered to reach the Sametime Welcome page.)

**Deleting a Discussion or a TeamRoom**

You can delete Discussions and TeamRooms that you have created. To delete a Discussion or TeamRoom:

1. On the Sametime Welcome page, click “Use Discussions and TeamRooms.”

2. Enter your user name and password. You can obtain your user name and password from the system administrator or create your own through registration.

3. Click Delete.

4. Select the Discussions or TeamRooms you want to delete.
5. Click Delete.

6. A warning might ask you to confirm your decision. If a warning appears, click OK or Yes.

7. A message confirming the deletion appears. To return to the Sametime Welcome page, enter the name of your server in your browser.

Note You cannot delete Discussions or TeamRooms created by others.

Using a Discussion

You can use a Discussion to share information with your coworkers and to keep shared documents in a central location. You can create and save documents such as text messages, links to Web sites, and file attachments so that your coworkers can view them and respond. You can also use Sametime to chat with others who are working in the Discussion.

Privacy

Usually, everyone in the Discussion can see the documents that you create. However, you might want to create documents that are not seen by other Discussion participants. For example, you might want to keep a draft of a document private until you have finished working on it.

A Discussion allows you to create private documents that only you can see. When you create a private document, the word “PRIVATE” displays in the subject line of the document. Other users can see the subject line, but they cannot view the document. When you are ready, you can choose to share a private document with other Discussion participants.

Creating a New Discussion Topic

You can introduce new ideas to the Discussion by creating main topics. A main topic is often the beginning of a “discussion thread,” which includes the topic and all responses to the topic.

To create a new topic:

1. Click Create New Main Topic at the top of the main Discussion page.

2. Enter a subject. The subject line is a brief title for your topic. Keeping your subject lines concise and descriptive will make the Discussion easy for others to follow. For example, a subject such as “Sales Project Deadline” tells others what they can expect to find in that topic.
3. Select a category from the list, or enter a new category in the “Enter a New Category” box. Categories are large, general groups of related topics. For example, you might assign the topic “Sales Project Deadline” to a “Deadlines” category.

4. If you want to attach a file to the topic, click Browse to locate the file.

5. Enter your text in the box.

6. If you do not want other users to see the topic, click Mark Private at the top of the page. When you want to share the topic with other users, you can edit it to make it public.

7. Click “Save & Close.”

---

**Creating a Response to a Discussion Topic**

You can participate in existing discussion threads by responding to topics or other responses.

To create a response:

1. From the main Discussion page, double-click the topic or response to which you want to respond.

2. When the document appears, click New Response at the top of the page.

3. Enter a subject. (The category appears automatically.)

4. If you want to attach a file to your response, click Browse to locate the file.

5. Enter your response in the text box.

6. If you do not want others to see your response, click Mark Private at the top of the page. When you want to share the response with others, you can edit it to make it public.

7. Click “Save & Close.”

---

**Editing a Topic or Response**

After you have saved a topic or response, you can reopen it and edit it at any time. When you edit a topic or response, you can change the text and the privacy status. You can also indicate that a document is no longer relevant by marking it “Expired.” You cannot edit documents created by other users.

To Edit a topic or response:

1. From the main Discussion page, double-click the topic or response you want to edit.
2. When the document appears, click Edit Document at the top of the page.
3. Edit the topic or response in the text box.
4. If the document is a private document that you now want to share with other users, click Mark Public at the top of the page. If the document is public, you can make it private by clicking Mark Private at the top of the page.
5. If the topic is no longer relevant, click “Mark/Unmark Document as Expired.” The word “Expired” appears next to the subject on the main Discussion page. Clicking “Mark/Unmark Document as Expired” again removes the “Expired” text from the subject line.
6. Click “Save & Close.”

**Deleting a Topic or Response**

In general, you should retain all documents in a Discussion to preserve a permanent record of the Discussion. If you do want to delete a topic or response that you have created, you can do so at any time. You cannot delete documents created by other users.

To delete a topic or response:

1. From the main Discussion page, click the topic or response you want to delete.
2. Click “Move to Trash” at the top of the page. Repeat steps 1-2 for each topic or response you want to delete.
3. Click Empty Trash at the top of the page.

**Tip** To prevent others from responding to an outdated topic, mark the topic “Expired” instead of deleting it.

**Viewing Discussions**

On the main Discussion page, you can see a list of Discussion documents. Main topics are aligned along the left margin and responses are indented beneath them. Responses to other responses are indented farther.

To view a single topic or response, double-click the text (the subject line) of the topic or response on the main Discussion page.

You can use Discussion views to sort Discussion documents in different ways. To change your view of a Discussion, click the appropriate view from the list on the left side of the main Discussion page. The views are:

- **All Documents**: Sorts documents chronologically by creation date.
• **By Author:** Sorts documents alphabetically by the author's name.
• **By Alternate Name:** Sorts documents by the author's Alternate Name, if available.
• **By Category:** Sorts documents alphabetically by category.
• **Author Profiles:** Sorts Author Profile documents alphabetically by the author's name. This view does not display Discussion topics and responses.

**Note** Alternate Names are available only to Notes users whose system administrators have enabled this feature. Alternate Names allow you to display a name in two different languages. For example, you can choose one name that displays in English, and an Alternate Name that displays in Japanese.

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### Working with Profiles

You can use two additional types of documents in Discussions.

- Author Profiles provide you with personal information about Discussion participants.
- Interest Profiles save time by alerting you to Discussion documents you are likely to be interested in. The Interest Profile filters out irrelevant Discussion documents so that you can check a Discussion only when relevant documents are created.

### Creating an Author Profile

Creating an Author Profile lets you share information about yourself with other Discussion users. When users are viewing Discussion documents that you have created, they can click on your Author Profile to learn more about you.

To create your Author Profile:

1. Click **My Author Profile** in the list on the left side of the main Discussion page. When your Author Profile appears, your user name and server name might be automatically entered in the Name field. These names are the only information required for your Author Profile.
2. (Optional) Enter your e-mail address.
3. (Optional) Enter your telephone number.
4. (Optional) Enter your role in the Discussion. You might want to enter your job role, such as “Sales Representative.”
5. (Optional) Enter your goals. Goals might include your goals for a particular project or your goals for your job role.

6. (Optional) You can enter additional information in the Other field. If a list appears in this field, you can select items from the list.

7. (Optional) To display a photo, click Browse to locate the file containing the photo. You must use a supported file type to display your photo. Supported file types are:
   - GIF
   - JPEG
   - JPG
   - JPE
   - JFIF
   - PJPEG
   - PJP

8. Click “Save & Close.”

**Note** You are not required to create an Author Profile.

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**Editing or Deleting an Author Profile**

You can edit or delete your Author Profile at any time once you have saved it. You cannot edit or delete anyone else’s Author Profile.

**To Edit Your Author Profile**

1. From the main page of the Discussion, double-click your Author Profile in the list of Discussion topics.
2. When your Author Profile appears, click Edit Document at the top of the page.
3. Enter your edits.
4. Click “Save & Close.”

**To Delete Your Author Profile**

1. From the main Discussion page, click your Author Profile in the list of Discussion topics.
2. Click “Move to Trash” at the top of the screen.
3. Click Empty Trash.
Viewing Author Profiles

You can view individual Author Profiles by clicking Author’s Profile at the top of the screen when you are viewing a Discussion document. Click Cancel to close the Author Profile window when you are finished.

If you want to see a list of all Author Profiles in the Discussion, click Author Profiles on the left side of the main Discussion page. You can view an individual Author Profile by double-clicking it.

Creating an Interest Profile

Interest Profiles allow you to monitor information that is relevant to your work while filtering out documents that do not interest you. You create an Interest Profile by defining the kinds of documents that you want to see. When a Discussion document matches the criteria defined in your Interest Profile, you receive an e-mail message that contains a link to the relevant topic.

To create your Interest Profile:

1. Click Interest Profile in the list on the left side of the main Discussion page.
2. (Optional) Specify one or more authors whose documents you want to see.
3. (Optional) Specify one or more categories that you want to track. Select one or more categories from the list or add new categories using the box provided. Separate new categories with a semicolon.
4. (Optional) Select one or more words or phrases from the list or enter new words or phrases.
5. Click “Save & Close.”

You can also track any discussion thread by viewing the main topic in the thread and clicking “Add Selected Topic to Interest Profile” at the top of the screen. If this feature has been enabled, you will receive e-mail messages as new documents are added to the discussion thread.

Note By default, Sametime does not send you e-mails about Discussion documents. The administrator must use Notes to enable the Interest Profile feature.
Editing or Deleting an Interest Profile

You can edit or delete your Interest Profile at any time once you have saved it.

**To Edit your Interest Profile**

1. Click My Interest Profile in the list on the left side of the main Discussion page.
2. When your Interest Profile appears, edit the information.
3. Click “Save & Close.”

**To Delete your Interest Profile**

1. Click My Interest Profile in the list on the left side of the main Discussion page.
2. When your Interest Profile appears, delete the information from each field.
3. Click “Save & Close.”

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Using a TeamRoom

A TeamRoom is a public forum where anyone who is working on a project can create documents for others to read, respond to comments from others, and review project status and deadlines. You can also use Sametime to chat with others who are working in the TeamRoom.

It is important to understand the following concepts when using a TeamRoom:

**The Team Leader and the Team Facilitator**

Every TeamRoom includes a team leader and a team facilitator. The team leader is responsible for organizing the team, defining team objectives, and making sure that the objectives are met. The team facilitator maintains the TeamRoom by creating and updating the TeamRoom information. The team leader and facilitator are the only team members who can edit or delete team documents and information entered by other team members. By default, the person who creates the TeamRoom is both the team leader and the team facilitator.
**Team Documents**

Participants in a TeamRoom can create team documents that include comments on a project, tasks that need to be completed, important reference information, or details about an upcoming meeting. When you create a team document, only you, the team leader, and the team facilitator can edit or delete the document, but anyone can read and respond to it.

**Personal Documents (Newsletter Profiles)**

If your administrator enables it, you can create a newsletter profile that will allow you to receive a list of documents that you define as relevant.

**Project Information**

All team members can view information about the project, such as status reports for teams and subteams and a list of TeamRoom participants. You can also add participants, deadlines, or status reports to the TeamRoom.

**Inactive, Expired, and Private Documents**

When creating or editing a document in the TeamRoom (such as a team document or a status report), you can define the document's status in the following ways:

- **Active or Inactive:** You might want to mark a document as “inactive” if it contains information that is no longer current or relevant. You can only view inactive documents in the “Index of All Documents” and Inactive Documents views of the TeamRoom.

- **Expired:** You might want to mark a document as “expired” if you are not ready to delete it, but it is no longer relevant to the TeamRoom. If your administrator enables archiving in your TeamRoom, expired documents are archived and eventually deleted from the TeamRoom.

- **Private:** You might want to mark a document as private if it contains incomplete or confidential information that you do not want others to see. You are the only person who can view a document that you mark as private.
Leading or Facilitating a TeamRoom

Every TeamRoom includes a team leader and a team facilitator. The team leader is responsible for organizing the team, defining team objectives, and making sure that the objectives are met. The team facilitator maintains the TeamRoom by creating and updating the TeamRoom information. By default, the person who creates the TeamRoom is both the team leader and the team facilitator. As the leader/facilitator, you can use the TeamRoom Setup options to enter information about the TeamRoom, such as the project name and objective.

You can use the TeamRoom Setup to define a new leader and facilitator. However, the person who creates the TeamRoom is the only one who can view the leader/facilitator options. If you enter a new name as the leader or facilitator, you must use Notes to give that person access to the leader/facilitator options. It is recommended that the person who creates the TeamRoom also facilitates and leads the TeamRoom.

Leading the Team

The team leader is responsible for organizing the team, defining team objectives, and making sure that the objectives are met. The leader might also work with the facilitator to be sure the TeamRoom is set up according to the needs of the project. The leader should be familiar with the information that team members can enter in the TeamRoom (such as the categories and document types they can use for team documents).

Duties that the team leader might perform include:

- **Creating weekly or biweekly status reports** for the team and its subteams.
- **Updating the list of participants** in the TeamRoom.
- **Organizing team members** into subteams.
- **Deleting documents** that are no longer needed in the TeamRoom, or editing a document to add new information. (The leader and the facilitator are the only team members who can edit or delete team documents and information entered by other team members.)
- **Keeping the team members informed** of changes to the TeamRoom by sending e-mails to the team members and making sure they check the TeamRoom regularly for new information.
- **Ensuring that team members have the resources and information they need** to complete their tasks on time.
Facilitating the Team

The team facilitator is responsible for creating and maintaining the TeamRoom Setup. The TeamRoom Setup defines how team members can enter information in the TeamRoom. For example, you can use the Setup to choose categories for team documents and to define deadlines for the project.

Duties that the team facilitator might perform include:

- **Creating the TeamRoom Setup** before others begin to use the TeamRoom. Some information is unavailable until you have created the Setup.
- **Updating the TeamRoom Setup** as the project progresses. For example, you might need to add a new category for team documents, remove a deadline that has become obsolete, or add a new participant to the TeamRoom.
- **Monitoring the TeamRoom** to ensure that team members are using it correctly. For example, if you notice that many team members are using status reports as a way to hold an ongoing discussion, you might suggest that they use team documents for discussions.
- **Using Lotus Notes** to set advanced options for the TeamRoom.
- **Sending reminders and newsletters** to team members. (Reminders and newsletters must be enabled by setting advanced options.)

Updating the TeamRoom Setup

The TeamRoom Setup determines the available options in the TeamRoom, such as categories for team documents. The team leader or facilitator must create the TeamRoom Setup before people can begin using the TeamRoom. After you have created the TeamRoom Setup, you can update it by using the leader/facilitator options or by opening the TeamRoom Setup document in the TeamRoom Overview and clicking Edit Document.

The sections in the TeamRoom Setup are:

- **Team Name and Purpose**: Allows you to define a name and purpose for the TeamRoom.
- **Participants**: Allows you to add and remove participants for the TeamRoom. You can create a profile for each participant that includes a telephone number, an e-mail address, and other relevant information. You can also divide participants into subteams.
• **Categories:** Allows you to define categories for the documents that you post in the TeamRoom. For example, if the TeamRoom is for a Marketing department, categories might include Sales, Public Relations, and Product Concepts.

• **Document Types:** Allows you to define the document types for documents in the TeamRoom. Document types determine the available fields on a TeamRoom document. The four default document types are Discussion, Action Item, Meeting, and Reference.

• **Milestones/Events:** Allows you to define the important dates and events for the TeamRoom.

• **Advanced Options:** Allows you to create “agents” that automatically send newsletters and reminders and file important information.

When you have finished creating the TeamRoom Setup, be sure to click “Save & Close” at the top of the Setup.

**Tip** After updating information in the TeamRoom, click the link at the bottom of the TeamRoom Setup page to confirm that your changes have been entered.

---

**Choosing a Team Name and Purpose**

The first step when setting up the TeamRoom is to choose a team name and purpose. You might want to name the TeamRoom according to the members of a department (“Marketing TeamRoom”) or a particular project (“Sales Projections for 2002”).

The team purpose should provide details about why the team exists and what the team should accomplish. Specific goals and detailed work objectives can also be included here.

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**Adding Team Members and Subteams**

The team leader or facilitator can add team members and subteams when setting up the TeamRoom. Any team member can add team members and subteams in the Project Information section of the TeamRoom.

**Note** To edit information about team members and subteams, click TeamRoom Overview on the left side of the TeamRoom under Project Information. Double-click the document you want to edit (for example, a participant profile or a milestone/event), and then click Edit Document.
Adding Team Members

You can add people to the TeamRoom so that you have a list of team members. Adding team members does not restrict the TeamRoom to those people only; anyone who logs on to Sametime can access your TeamRoom and read and create TeamRoom information.

To add team members to the TeamRoom:

1. Do one of the following:
   - If you are a leader or facilitator, click Participants on the left side of the TeamRoom Setup frame. Click “Add team member” to add a new team member.
     You can also use the Participants page to define someone other than yourself as the team leader or facilitator. If you enter a new name as the leader or facilitator, you must use Lotus Notes to give that person access to the leader/facilitator options. (By default, the person who creates the TeamRoom is the only one who can view the leader/facilitator options.) It is recommended that the person who creates the TeamRoom also facilitates and leads the TeamRoom.
   - If you are a team member, click TeamRoom Overview on the left side of the TeamRoom under Project Information. Click New, and then click Team Member.

2. Enter any of the information on the Participant Profile page: Name, Department, Location, E-Mail Address, Phone, and Job Title. Only the name is required.

3. Click “Save & Close.”

4. To enter another team member, click Participant Profile and repeat steps 2.-3. When you have entered all team members, click Done.

Tip If you are the team leader or facilitator, remember to add the team leader and team facilitator as team members during TeamRoom Setup.

Adding a Subteam

Subteams allow you to define a subset of participants who work on a particular project together. Be sure to add team members to the TeamRoom before adding a subteam.

To add a subteam:

1. Do one of the following:
   - If you are a team leader or facilitator, click Participants on the left side of the TeamRoom Setup frame, and then click “Add subteam.”
• If you are a team member, click TeamRoom Overview on the left side of the TeamRoom under Project Information. Click New, and then click Subteam.

2. Enter a name for the subteam.

3. Choose participants for the subteam. You can select more than one participant at a time by pressing CTRL and clicking on the participants’ names with your mouse.

4. Enter a purpose for the subteam. You might want to describe the duties that the subteam is expected to perform.

5. If you want the subteam to have an “active” status, leave the “Active” radio button selected. Otherwise, select the “Inactive” radio button. (Most subteams should have an active status. You will only be able to view inactive subteams in the All Documents and Inactive Documents views of the TeamRoom.)

6. Click “Save & Close.”

7. To enter another subteam, click “Subteam Profile” and repeat steps 2-6. When you have entered all subteams, click Done.

**Tip** If you are the team leader or facilitator, click “Subteam details” to see a list of the members in each subteam. Select the subteam you wish to view. Click Done when you are finished viewing the members of the subteam.

### Entering Categories

Team members can use categories to organize the documents that they create in the TeamRoom. For example, a Marketing team might use categories such as Sales Ideas, Customer Requests, and Public Relations.

When creating a new document in the TeamRoom, a team member can choose the appropriate category for the document. Team members can then view documents according to category by clicking By Category on the left side of the TeamRoom.

To enter categories:

1. Click Categories on the left side of the TeamRoom Setup frame.

2. Enter the appropriate categories in the text box. Press Enter or type a semicolon (;) to separate entries as you type them.

3. Click “Save & Close.”
Mapping Categories

During a project, the way you and other team members need to organize information might change. If you have changed the categories in your TeamRoom (using the Entering Categories procedure during TeamRoom Setup), click Map Categories on the Leader/Facilitator Options menu to replace obsolete categories with current categories. (You must save any changes you have made to the TeamRoom Setup before mapping categories.)

Entering Document Types

Team members use document types to define the purpose of the document. For example, if you create a document and choose “Action Item” as the document type, the document should include information about a task that a team member needs to complete.

The four default document types are Discussion, Action Item, Meeting, and Reference. The document type determines the available fields at the bottom of a TeamRoom document. For example, if a team member chooses the Meeting document type when creating a document, the Location field appears on the Main Document form. The Location field does not appear for any other document type.

To enter document types:

1. Click Document Types on the left side of the TeamRoom Setup frame.
2. Accept the default document types or enter new document types of your own choosing. You can enter as many document types as you want. Each document type that you enter will have the characteristics of the “Discussion” document type.

Entering Milestones and Events

Milestones and events serve as deadlines for your project or reminders of important stages in the project. The team leader or facilitator can enter a milestone or event when setting up the TeamRoom. Any team member can enter milestones or events in the Project Information section of the TeamRoom.
To enter a milestone or an event:

1. Do one of the following:
   • If you are the team leader or facilitator, click Milestones/Events on the left side of the TeamRoom Setup frame, and then click “Add milestone/event.”
   • If you are a team member, click TeamRoom Overview on the left side of the TeamRoom under Project Information. Click New, and then click Event.

2. Enter a name for the milestone or event.

3. Enter a date for the milestone or event. Enter the date in the mm/dd/yyyy format.

4. (Optional) Enter any details about the milestone or event. You might want to include a list of the tasks that must be completed before the event can occur.

5. Click “Save & Close.”

6. To enter another milestone or event, click “Event Profile” and repeat steps 2-5. When you have entered all events, click Done.

Setting Advanced Options

You must use Lotus Notes to set the advanced options for the TeamRoom. Advanced options allow you to:

• Mark TeamRoom documents inactive after a specified time interval.
• Send newsletters to TeamRoom participants.
• Send reminders about due dates to TeamRoom participants.

Note If you do not set advanced options, newsletters and reminders will not function in your TeamRoom.

Sending Reminders

The leader or facilitator can send reminders to team members who need to review a document or complete a task. Reminder e-mails are sent to the following people:

• All team members who are listed as reviewers for a document.
• All team members who are assigned to an action item. A reminder is sent if the due date for the action item has passed.
Note By default, you cannot send reminders in a TeamRoom. You must have Lotus Notes and use it to set advanced options for the TeamRoom before you can send reminders.

Working with Team Documents

You and your coworkers can use team documents to participate in online business discussions. Any team member can create, read, and respond to team documents; the discussion is visible to everyone in the TeamRoom.

You can view team documents in the following ways:

- **By Date**: All team documents, sorted by the date on which they were created.
- **By Category**: All team documents, sorted by category.
- **By Milestone/Event**: All team documents, sorted by the milestones or events with which they are associated.
- **Chronological**: All team documents, sorted chronologically by date. (Only the date and the topic name are visible.)
- **By Subteam**: All team documents, sorted by the subteams with which they are associated.
- **Open by Due Date**: All open action items and all team documents that have not been reviewed by the assigned team members.
- **Open by Assignment**: Open action items and team documents that have been assigned to team members, sorted by the names of the people who are assigned to them. If the document has been assigned to someone who has already reviewed it, the document does not appear under that person's name.

Note Team documents include the discussion topics that team members have created in the TeamRoom. They do not include any other TeamRoom information, such as status reports, information about participants or events, or newsletter profiles.

Creating or Editing a Team Document

To create a team document, select an item on the Team Documents menu on the left of the TeamRoom and click New Document. To edit a team document, double-click the document to open it and click Edit Document. The information below describes the available options for a team document.
Choosing a Document Type

The following table lists and describes the four default document types. The document type determines the fields that are available at the bottom of the Main Document page. For example, if you select “Meeting,” you can enter a location for the meeting at the bottom of the page.

**Note** Your team leader or facilitator can create additional document types. Any document type that is not listed in the table below has been created by the team leader or facilitator and is identical to the Discussion document type.

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| Discussion    | • Use this document type for a general interest topic.  
                • The fields at the bottom of the form allow you to select reviewers for the topic and set a due date for the review. A date for review is not required, but if you enter one, you must enter the name of at least one reviewer.  
                • When a reviewer opens the document in the TeamRoom, a “Mark Reviewed by Me” option appears. Reviewers can edit the document until everyone on the reviewers list has selected the “Mark Reviewed by Me” option. |
| Action Item    | • Use this document type for a topic that contains a task for a team member or a subteam to complete.  
                • The fields at the bottom of the form allow you to select a due date for the task and to assign team members to the task. A due date is not required, but if you enter one, you must assign the action item to at least one person.  
                • Any team member who has been assigned to the action item can mark it as complete when editing the document. After any team member selects the “Mark complete” option, only the original creator of the document can edit it. |

*continued*
<table>
<thead>
<tr>
<th>Document Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| Meeting       | • Use this document type to enter information about an upcoming meeting. (This option does not schedule or create a meeting.)  
• The fields at the bottom of the form allow you to enter information about the meeting, such as the date and time of the meeting. You can also select people or subteams to attend the meeting. (Selecting people or subteams does not restrict the meeting to just those people.) This meeting information is separate from the information you enter for a meeting. You must start a meeting from the Meeting Center or from Sametime Connect. |
| Reference     | • Use this document type for topics that contain reference information, such as term definitions or project plans.  
• The fields at the bottom of the form allow you to select reviewers for the topic and to set a due date for the review. A date for review is not required, but if you enter one, you must enter the name of at least one reviewer.  
• When a reviewer opens the document in the TeamRoom, a “Mark Reviewed by Me” option appears. Reviewers can edit the document until everyone on the reviewers list has selected the “Mark Reviewed by Me” option. |

**Entering a Subject**

The subject line is a brief title for your topic. Keeping your subject lines concise and descriptive will make the discussion easy for others to follow.

**Selecting a Category**

Categories are large, general groups of related topics. For example, you might assign the topic “Sales Project Deadline” to a “Deadlines” category. If you do not see an appropriate category for your topic, speak to the team leader or facilitator; they can update the TeamRoom to include new categories.

**Selecting an Event or Milestone**

Milestones and events serve as deadlines for your project or reminders of important stages in the project. Select an event or milestone to associate with the document. For example, if you are writing a document about an upcoming deadline, select the associated deadline in the Associated Event box.
Selecting a Subteam

If a subteam is associated with the document, select the appropriate subteam. For example, if you are commenting on a project that a particular subteam is working on, select the appropriate subteam in the Associated Subteam(s) box.

Attaching a File

If you want to attach a file to the document, click Browse and select the file. You might want to attach a document for review, such as a draft of a proposed schedule.

Additional Information

Enter any additional information for the topic at the bottom of the Main Document page. The available fields at the bottom of the page are determined by the page’s document type. See the table above for more information.

There are also two links at the bottom of the page: “combined list” and “send link to assignees.” Click the “combined list” link to see a list of everyone you have assigned to review the document or complete the task. The “send link to assignees” link allows you to e-mail a link to this document to the assignees.

Note By default, you cannot use the “send link to assignees” link in a TeamRoom.

Entering Text

Enter the text of the document in the Content box.

Tip To keep others from seeing your document, click Mark Private at the top of the screen.

When you have completed the document, click “Save & Close.”

Working with Personal Documents (Newsletter Profiles)

Your Newsletter Profile allows you to monitor information that is relevant to your work while filtering out documents that do not interest you. You create a Newsletter Profile by defining the kinds of documents that you want to see. When a TeamRoom document matches the criteria defined in your Newsletter Profile, you receive an e-mail message (or “newsletter”) that contains a link to the relevant topic.

To create your Newsletter Profile:
1. Click My Newsletter Profile under Personal Documents on the main TeamRoom page.
2. (Optional) Select one or more authors whose documents you want to see.
3. (Optional) Select one or more categories you want to track. For example, you might want to receive information about all topics that are related to Marketing Strategies or Product Concepts.
4. (Optional) Select one or more events you want to track. For example, you might want to receive information about all topics that are related to a specific project deadline.
5. (Optional) Select one or more words or phrases from the list or enter new words or phrases.
6. Click “Save & Close.”

You can also add items to your Newsletter Profile by viewing a topic and clicking “Add Selected Topic to Newsletter Profile” at the top of the screen. If the leader or facilitator has enabled this feature, you will receive e-mail messages as people respond to the selected topic.

After creating your newsletter profile, you can open it at any time and click Edit Document to change the information in the profile. To delete a newsletter profile, edit the profile and remove all information in the fields on the Newsletter Profile page.

**Note** By default, you cannot receive newsletters in a TeamRoom. The facilitator or leader must have Lotus Notes and use it to set advanced options for the TeamRoom before you can receive newsletters.

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**Working with Project Information**

The project information in a TeamRoom includes:

- **Information about the TeamRoom**, such as the available categories and document types for team documents and the available status reports for the team and its subteams.

- **A profile of each participant** who has been added to the TeamRoom. Profiles include information such as the participant’s telephone number, e-mail address, and location.

- **Information about the subteams** that the team leader or facilitator has created for the TeamRoom. Subteams are smaller groups within the team; for example, a Marketing team might have a Public Relations subteam.
• **Information about the milestones and events** that are associated with the TeamRoom. Milestones and events allow you to track important deadlines and tasks.

You can view project information in the following ways:

• **TeamRoom Overview**: A quick way to view all team information, including the TeamRoom Setup (which is created by the team leader or facilitator), participant profiles, and milestones and events

• **ActiveTeam/Subteam Status**: All status reports for the team and its subteams

• **Calendar**: All documents that have an associated date, such as action items, meetings, and milestones or events

• **Index of All Documents**: All documents in the TeamRoom, including team documents, participant profiles, and milestones or events

• **Inactive Documents**: A list of all documents that have been marked as inactive

---

**Adding or Editing Project Information**

You can use the Project Information menu to the left of the TeamRoom to add project information to the TeamRoom, including:

- Team Members
- Subteams
- Milestones and Events
- Status Reports

To edit project information, open the document you want to edit (such as a status report) and click Edit Document.

**Note** As a team member, you can only edit documents that you have created. The leader or facilitator can edit any document in the TeamRoom.

---

**Creating a Team or Subteam Status Report**

Any team member can create a status report for everyone who uses the TeamRoom or for a subteam. Use status reports to inform the team about ongoing and new issues as well as any concerns or obstacles related to the project. When the project is over and you are ready to stop using the TeamRoom, the team leader can create a team status report that summarizes the project, the outcome, and anything you would like to do differently for the next project.
To create a team or subteam status report:

1. Do one of the following:
   - If you are the team leader or facilitator, click Create Team Status on the Leader/Facilitator Options menu to create a team status report. Click Create Subteam Status if the status report is for a subteam.
   - If you are a team member, click Active Team/Subteam Status on the left side of the TeamRoom under Project Information. To create a team status report, click New Team Status. To create a subteam status report, click New Subteam Status.

2. If you are creating a subteam status report, select the name of the subteam.

3. Enter a report date.

4. Select a report status. For most status reports, you should leave the status as “Active.” An inactive status report will only be visible in the Inactive Documents and “Index of All Documents” areas of the TeamRoom.

5. Enter a name for the report in the Report Subject field.

6. Enter a brief description of the team or subteam status in the Summary text box.

7. Enter report details in the Details text box.

8. Click “Save & Close.”

---

**Deleting a Participant, Subteam, Milestone, or Event**

As a project progresses, participants might move on to other projects, and events that were originally planned might become obsolete. Use the TeamRoom Setup to make sure information about participants and events is current.

**Tip** If you delete a participant, be sure to remove that participant’s name from any subteams to which the participant belonged.

To delete a participant, subteam, milestone, or event:

1. Click “Delete Participant, Subteam or Event” at the top of the TeamRoom Setup.

2. Select any participants you want to delete in the “Choose Participant(s) to delete” box.

3. Select any subteams you want to delete in the “Choose Subteam(s) to delete” box.
4. Select any milestones or events you want to delete in the “Choose Event(s) to delete” box.
5. Click Delete Item(s).
6. Click Done. To confirm that the participant, subteam, or milestone has been removed, click the link to refresh the lists in the TeamRoom Setup.

**Note** Any participant, including the team leader or team facilitator, can use the Team Overview to update or delete a participant, subteam, or event.

---

**Deleting TeamRoom Information**

To delete TeamRoom information (including a team document, status report, participant profile, or event):

1. Click the document you want to delete. You can only delete documents that you created. (The leader or facilitator can delete any document in the TeamRoom.)
2. Click “Move to Trash” at the top of the page.
3. Repeat steps 1-2 for each document you want to delete.
4. Click the Empty Trash button at the top of the page. The document is no longer available in the TeamRoom.

**Note** To delete a newsletter profile, you must edit the profile and remove all information in the fields on the Newsletter Profile page.
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