POLYCOM
Network Systems

Polycom WebOffice™

User's Guide

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Introduction 1

Polycom Web*Office* is a web-based, real-time conference and collaboration software tool that enables the users to start and attend meetings, share files, instant message other users, or create audio and video conferences.

Since Polycom Web*Office* application is web-based, the clients of your Polycom Web*Office* server can be connected to the system, through the company LAN or the Internet, and use any of the features of the system, from any place around the world. Polycom Web*Office* is available to clients at any time of the day, as long as the server is properly connected to the network and operational, providing instant opportunities to collaborate with colleagues.

To ensure the security of the system, Polycom Web*Office* has Security options, which include document encryption and password protected meetings, and can be configured by the meeting owner. For added security, Polycom Web*Office* administrator can deny web office creation via the Internet and require all registrations to be key-protected.

Any client of Polycom Web*Office* server can, at any time, initiate a meeting and choose which guests to invite to participate. As the Owner of the meeting, the client can perform the following:

- Choose who may or may not attend the meeting
- Password-protect meetings
- Expel meeting participants
- Share documents between participants, and set encryption options
- Monitor participants activity during the meeting, i.e. whether the client is attentive or whether the client is working in another program window
- Use the Voting feature to gauge the opinion of participants on any question presented to the group
- Initiate an audio or video conference

A Polycom Web*Office* user may access the Polycom Web*Office* server by either starting the Polycom Web*Office* client application or by typing the address to the server into a web browser address line. Once in the Lobby of the server, the user can perform any of the following:

- Search for a particular Polycom Web*Office*
- Initiate an Instant Message

- Leave a message for the Web*Office* owner
- Leave a business card
- Take the owners business card
- Join a meeting started by the Web*Office* owner
- Drop off files for the Web*Office* owner

This manual will present all of the features available to the Web*Office* user and step-by-step instructions to perform the common tasks.

Polycom Web*Office*

Polycom Web*Office* is your personal area on the Polycom Web*Office* server. From this point you may initiate meetings, chat with colleagues, share documents, etc. Guests may also visit your Web*Office*, simply by typing your office address into a web browser, to send an instant message, leave a business card, leave a message, share documents, or request a meeting.

Your Web*Office* lets your customers, colleagues and business partners see your availability.

Polycom Web*Office* Manager

The Polycom Web*Office* Manager is a client application running on your computer that enables you to manage your Web*Office* by configuring preferences, your profile data, and your online status.

The Polycom Web*Office* Manager enables you to use all of the Polycom Web*Office* features. The Polycom Web*Office* Manager is available to those users who have a Web*Office* on the server.

Polycom Web*Office* Meeting Manager

Polycom Web*Office* Meeting Manager is a separate application that is integrated into your Polycom Web*Office* Manager. The Meeting Manager specifically manages the functionality that enables you to connect to and participate in meetings, share documents, collaborate and share desktops.

While connected to a meeting, the Meeting Manager provides meeting control features and participant status reports.

Using Polycom Web*Office*

A Web*Office* owner can log into his/her Web*Office* through an icon located on the desktop. Once logged in, the Polycom Web*Office* Manager opens and the owner can perform any of the functions available.

Starting a meeting, inviting participants, checking other Web*Office* owner's status, or sending an Instant Message is easily performed through a click of the mouse on the appropriate button. The entire functionality of the Web*Office* is literally at your fingertips.

Getting Started 2

To begin using your Web*Office*, you must have a Web*Office* set up for you by your system administrator. After connecting to your Polycom Web*Office*, both through the client application or by using a web browser, log in and configure the Polycom Web*Office* to your preferences.

The following sections will guide you in the tasks of getting started as well as accessing and using your Web*Office*:

- Accessing your Web*Office*
- Downloading the Web*Office* Client application
- Configuring your Web*Office*

Accessing your Web*Office*

Using a Web Browser

The first time you visit your Web*Office* from your computer, or any time you use a different computer, you must log in through the Web*Office* URL using a web browser.

The URL of your Web*Office* follows the syntax:

www.<WebOffice domain>.com/<your e-mail address>, e.g. *www.polycomweboffice.com/john.smith@polycom.com*.

Check with the Web*Office* administrator for the correct URL.

Note:

- Be sure the computer you are using has access to the LAN or Internet in order to log in to the Web*Office* server,
- If attempting to access the Web*Office* server over the Internet, be sure that the Web*Office* administrator has enabled access from outside of the server LAN.

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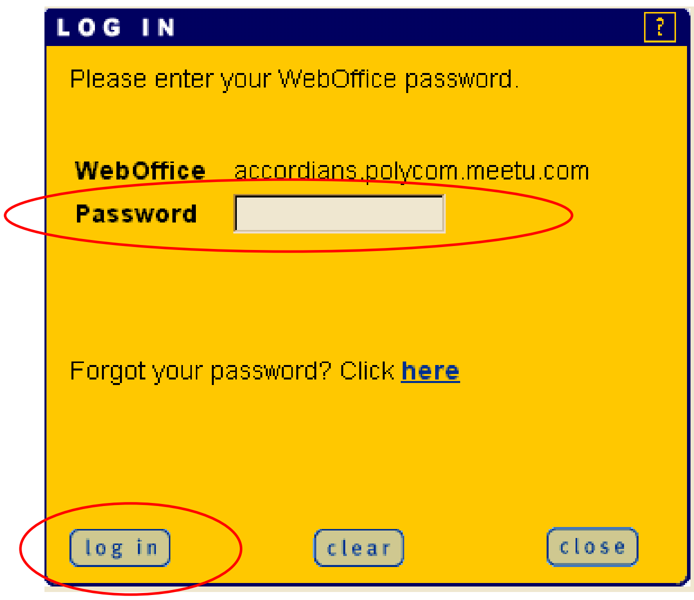
1. Enter your Web*Office* URL in the address field of the web browser.

   You will see your name and availability displayed.

2. Click the **OWNER LOG IN** option

3. Type in your password and click the **Log In** button.



A connection window will open and the Polycom Web*Office* Manager will download and start automatically. The Polycom Web*Office* Manager icon will appear in your system tray. You are ready to begin work.

Testing System Compatibility

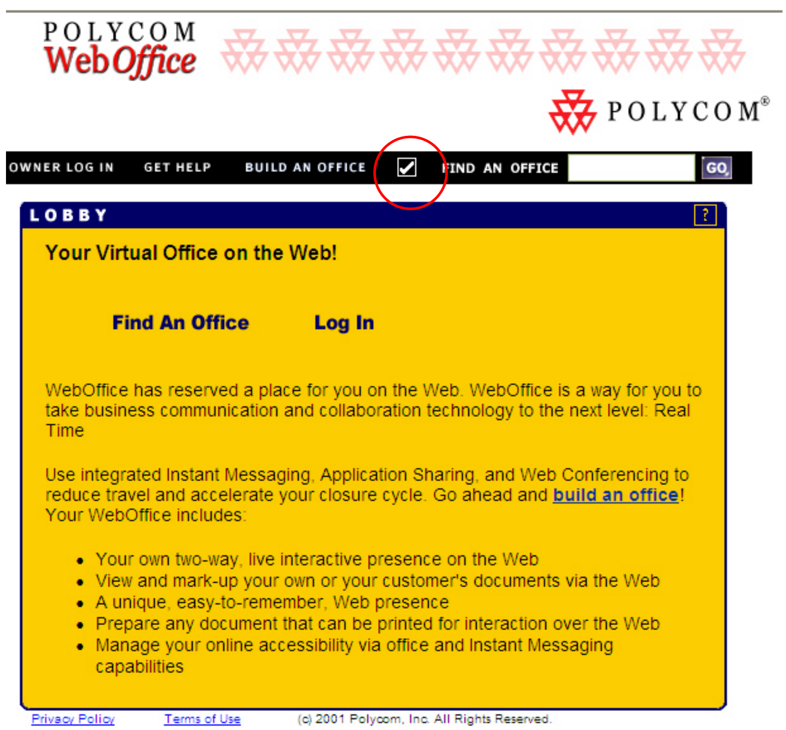
Browser Test

Polycom Web*Office* requires a certain level of security settings in the browser to operate effectively. Rather than ask the user to manually configure the browser settings, Polycom Web*Office* provides a utility that automatic tests the browser is use and instructs the user what to do if a problem has been found.

This test will check the browser cookies, Java and scripting settings. In typical configurations, these browse settings are already enabled correctly.

This test will run a thorough check for all the settings needed for Web*Office* to operate smoothly. You can initiate a full browser test using the following instructions:

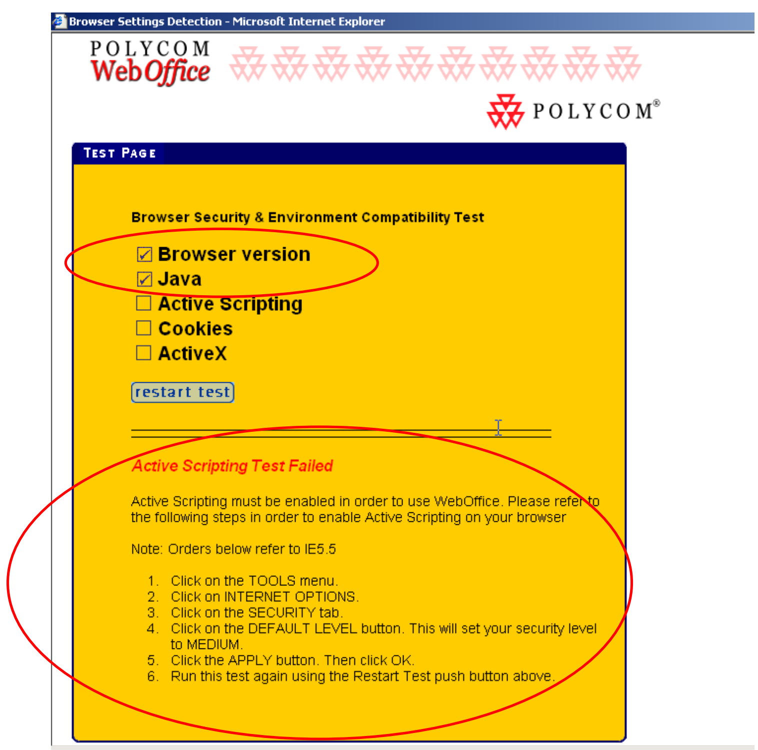
1. Click the **Check Mark** icon in the Polycom Web*Office* menu bar.



The test will start. The *Test Page* window opens at the end of the test.

The summary of all tests results indicate the compatibility of your browser and its settings. If one of the settings is not configured correctly, its check box remains cleared and an explanation of the problem is displayed at the bottom of the window.

The following screen is an example of an incorrectly configured browser setting.



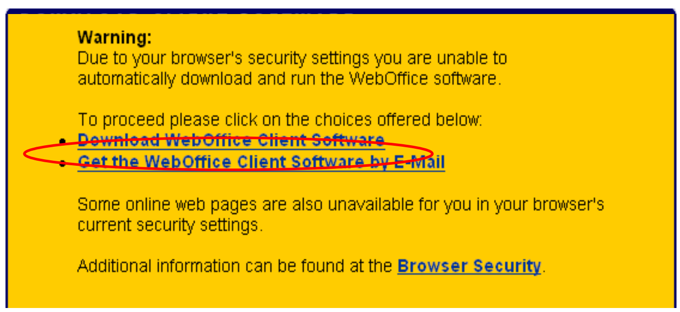
4. Follow the directions presented in the window to fix the browser compatibility issues.
2. Click **Restart Test** to re-test the browser.

Manually Downloading the Polycom Web*Office* Client

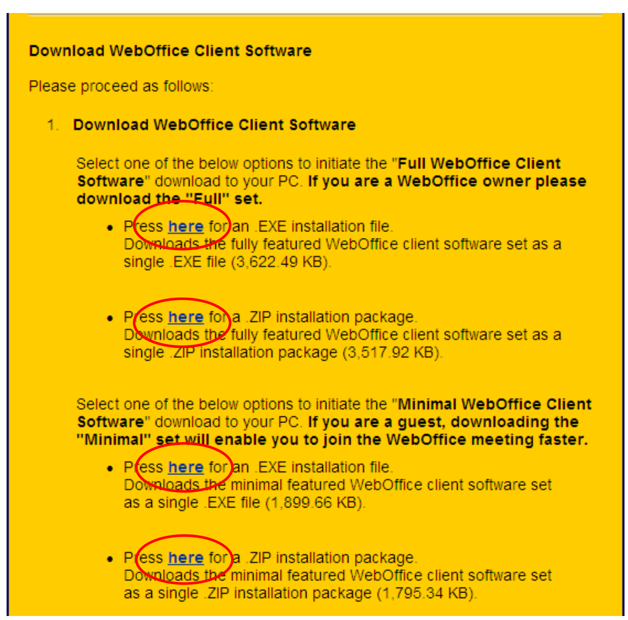
If the client could not be downloaded and installed, it may be because of your browser's security settings. The *Download Client Software* window opens displaying options to download the Polycom Web*Office* client application. You can manually download the client application or receive it by e-mail.

Downloading the Installation File

1. In the *Download Client Software* window, click the **Download WebOffice Client Software** hyperlink.



2. Click the appropriate **here** hyperlink to select the file type and to start the download process.



Once Installation File is downloaded

If a program file is downloaded (e.g. SAClientFull.exe):

1. Locate the downloaded file and double-click its icon to start the installation.
5. Follow the instructions in the Installation section of this manual.

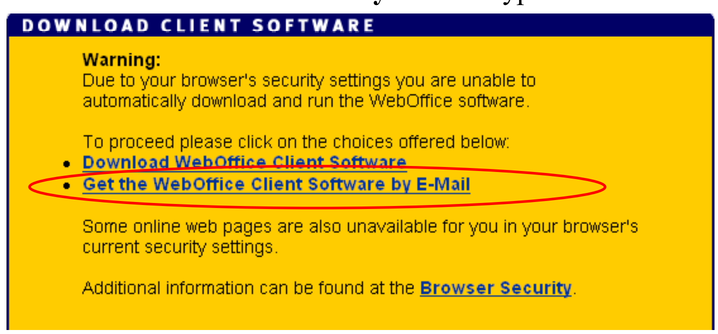
If a ZIP file is downloaded (e.g. SAClientFull.zip):

1. Locate the downloaded file and double-click its icon to uncompress the zip file.

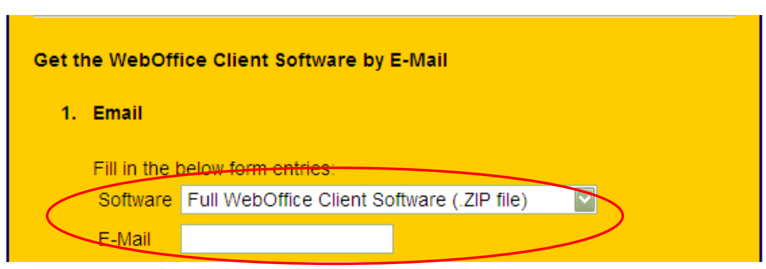
   During the decompression process, a program file will be extracted and saved to the same directory as the zip file.
6. Double-click its icon to start the installation.
7. Follow the instructions in the Installation section of this manual.

Receiving the Installation File via E-mail

1. In the *Download Client Software* window, click the **Get the WebOffice Client Software by E-mail** hyperlink.



2. In the *Software* drop-down list, select the file type.
3. In the **e-mail** field, Enter your e-mail address



Once the Installation File is Received by E-mail

If a program file is downloaded (e.g. SAClientFull.exe):

1. Locate the downloaded file and double-click on the icon to start the installation

8. Follow the instructions in the Installation section of this manual

If a ZIP file is downloaded (e.g. SAClientFull.zip):

1. Locate the downloaded file and double-click on the icon to uncompress the zip file.

   During the decompression process, a program file will be extracted and saved to the same directory as the zip file.

2. Double-click on the icon to start the installation.

3. Follow the instructions in the Installation section of this manual.

Using Polycom Web*Office* Client

1. Click the Polycom WebOffice client icon on your desktop to start the WebOffice Manager.
   Alternatively, click **Start→ Polycom WebOffice→ WebOffice Manager**.
   The *WebOffice Manager* window opens.

2. Enter your WebOffice name and password in the appropriate fields.

3. Select the **Save Password** check box to bypass the login process during subsequent logins to the WebOffice Manager.

4. Click **Login** to continue, or **Cancel** to cancel the login process.

Notes:

- Internet Explorer must be enabled for ActiveX & JavaScript downloads.
  To configure the browser, access **Tools→ Internet→ Security→ Internet** tab. It is recommended that you select **Medium** security, or you may set the settings manually.
- Enable Active X and Java Applets. To configure this feature:
  - Open Internet Explorer and click on **Tools**, and select **Internet Options→ Next**.
  - Click the tab labeled **Security** and then click **Custom Level**.
  - Click **Enable** for all of the ActiveX controls (a total of 5). Scroll through the list and click the **Enable** option to enable the Scripting of Java applets.
- As an alternative, you may also list this site as a “trusted site” in the *security* tab.
- If you are connected through a firewall (most corporate LAN’s use one), the firewall MUST be configured to allow HTTP (port 80) and ActiveX downloads.
- Contact your IT Manager if the software fails to download.

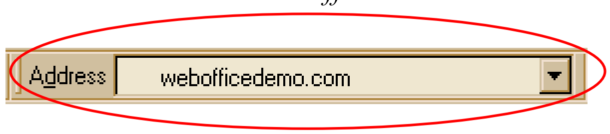
Creating a New Web*Office*

Now that you have logged into the Web*Office* server using your personal URL and password, you are ready to build your personal Web*Office*. During Web*Office* configuration, you are required to enter your details and to accept the Web*Office* Client software agreement.

You may manage your preferences and personal profile from the Web*Office* once created. Refer to Chapter 3 for more information on using and maintaining your Web*Office*.

Create a new Web*Office* using the following steps:

1. If you have not already done so, open your web browser and enter the home address of the Web*Office* URL.



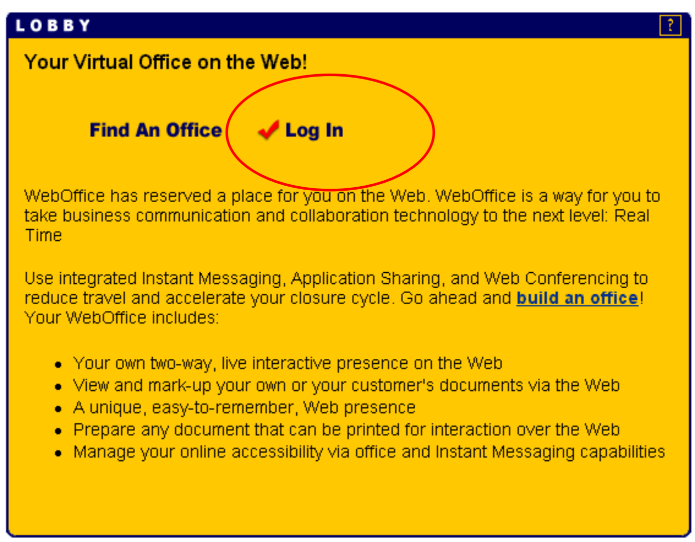
2. Click the **BUILD AN OFFICE** option

The *Build an Office* window opens.

3. Complete the information requested on the registration form.
4. Carefully read the conditions of use and select the **I agree with the conditions below** check box.
5. Click the **Submit** button.

When the Web*Office* is created, the *Lobby* window opens. In addition, a confirmation e-mail message with your Web*Office* name (address) and password is sent to you.

You can now log into your newly created personal Web*Office*.



Notes:

- If the name that you select for your office is already in use, Web*Office* will suggest alternatives.
- After creating your Web*Office*, the Web*Office* Manager will automatically install on your computer. At the beginning of this process, you may be prompted to grant the browser a right to install the software. Please make sure you choose accept, otherwise the setup will fail.
- If you are using a short URL addressing format, your Web*Office* name will be in form of *http://johnd.company.com.* If you are using a long URL addressing format, your Web*Office* name will be in the syntax of *http://www.company.com/youremailaddress@yourcompany.com*

The Web*Office* 3

Your Web*Office* is your personal location on the Web*Office* server where colleagues and business contacts can visit and instantly see your availability, leave a message or business card, or upload a file. From the Web*Office*, you can initiate meetings, Instant Messages, or share documents with guests.

When you login to your Web*Office* and make your status available, you will be notified when a guest arrives at your Web*Office*. You can send your guest an Instant Message, invite them to a meeting, or ignore the visitor.

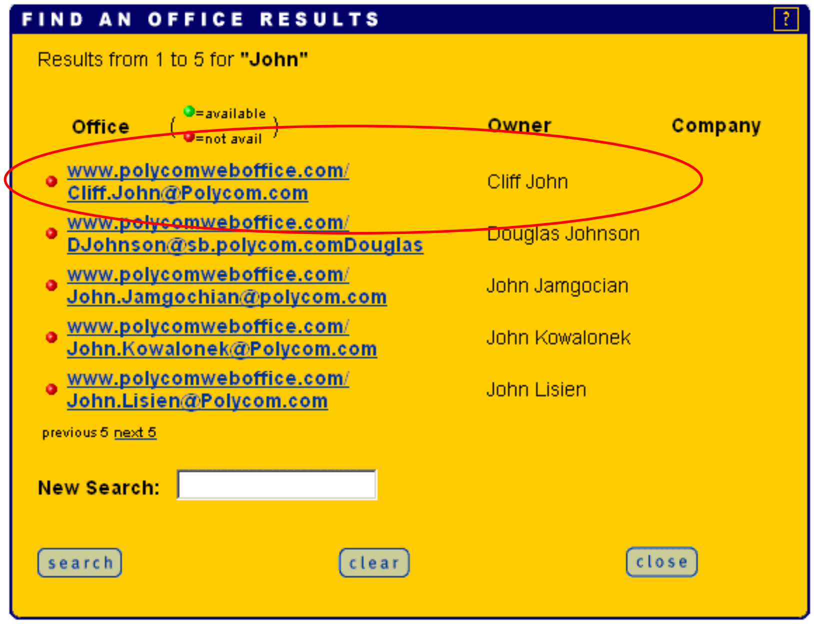
Finding a Web*Office*

The Web*Office* client contains a feature to search for other Web*Office*s on your network without knowing the user's URL. The *Find an Office* feature is accessible from the Web*Office* Manager menu bar.

To search for a Web*Office*:

1. Enter the partial WebOffice address or owner's name in the blank field next to Find an Office.
2. Click GO to start the search.

All Web*Office*s that match the search criteria will be returned in the Find an Office *Results* window. The window will show the Web*Office* name, the owner's name and company, and the Web*Office*'s availability.



3. Click on the desired WebOffice link to visit the office.

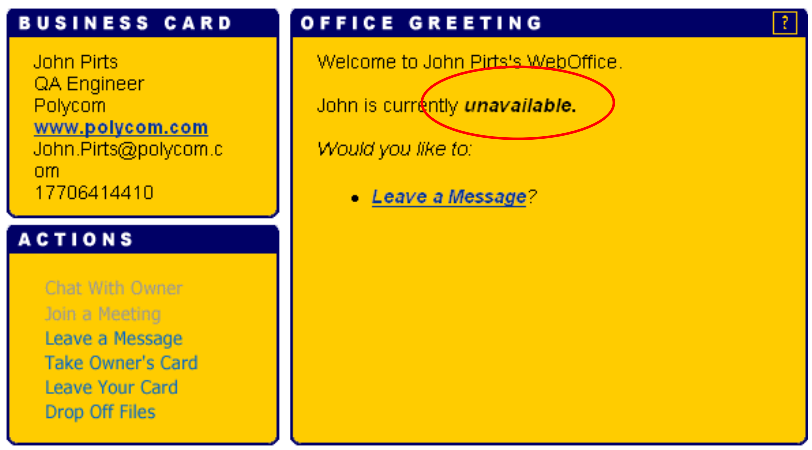
Visiting a Web*Office*

When you arrive as a guest to the desired Web*Office*, the screen you see is dependent on whether the Web*Office* owner is logged in and whether he/she is available.

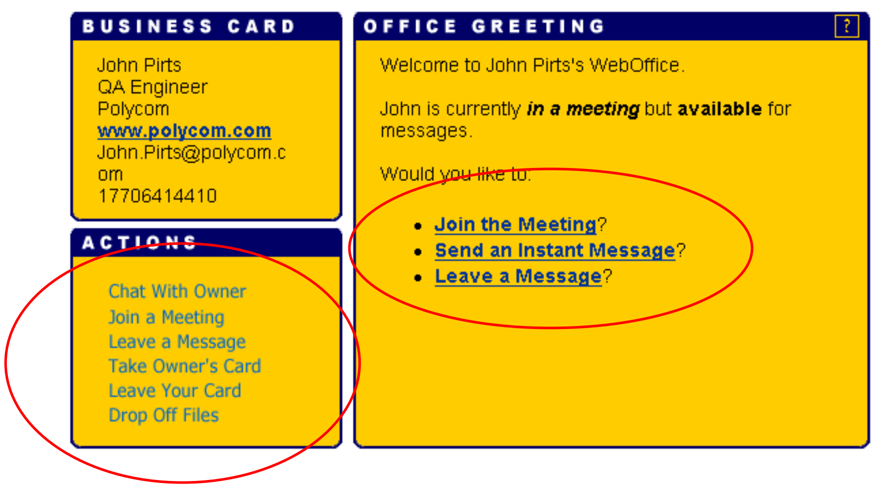
The Web*Office* home screen has three sections:

- Owner's Business Card
- Web*Office* Greeting and Owner Status
- Available Actions

In the event that the owner has not logged in, the following window is displayed.



In the event that the owner is logged in, the following options become available in the *Office Greeting* pane and in the Actions pane:

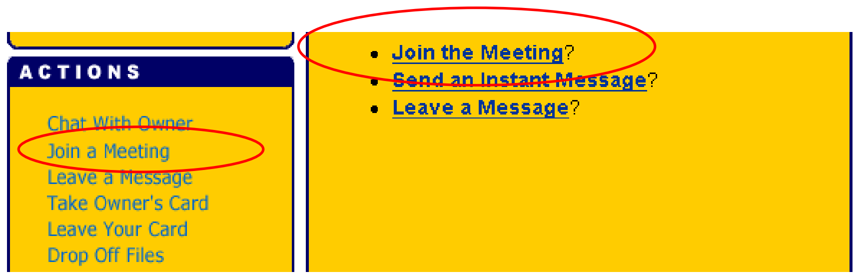


The following sections present and describe the options available in the Web*Office* window.

Joining a Meeting

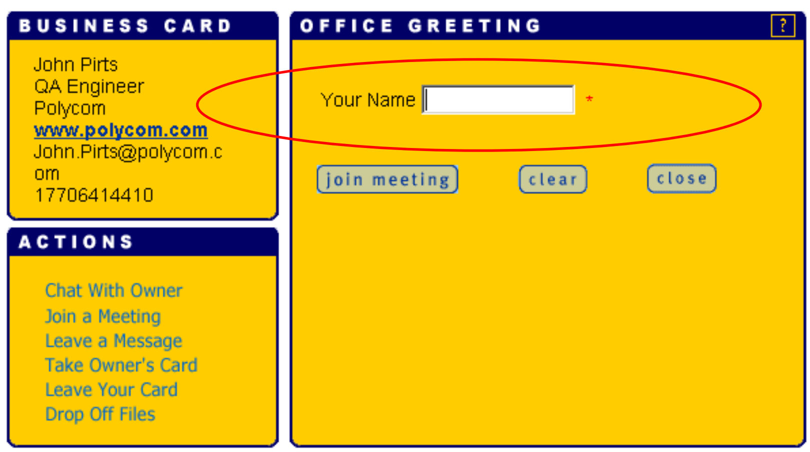
To join an ongoing Web*Office* meeting:

1. In the Web*Office Actions* or *Office Greeting* panes, click the **Join a Meeting** option.



The *Office Greeting* pane displays an identification field.

2. In the *Office Greeting* pane, in the *Your Name* field, enter your name and click the **Join Meeting** button..

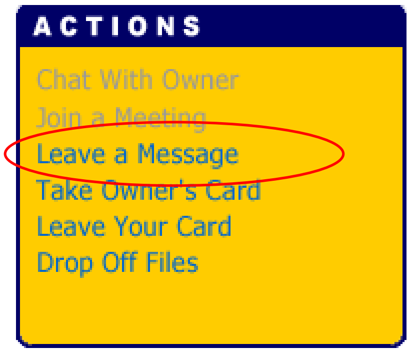


Note:
If the meeting is password-protected, the meeting owner must convey the password to you.

Leaving a Message for the Web*Office* Owner

A Guest may leave a message to the Web*Office* owner. The message is written in an e-mail format, delivered separately to the Owner.

1. Select the **Leave a Message** option.



The *Leave a Message* window opens.

2. Enter your name, e-mail address and message to the Web*Office* meeting owner in the appropriate fields.

   A red star indicates mandatory fields.

3. Click the **Leave Message** button to send the message.

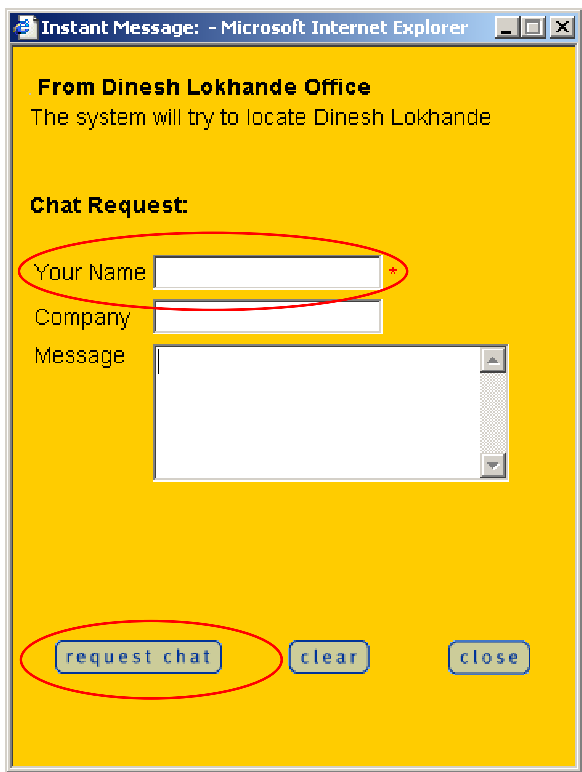
Sending an Instant Message Request to the Office Owner

The Web*Office* lobby indicates the owner's availability to guests. If the owner is available, guests can request a Chat (Instant Message) session with him/her.

To initiate a chat request from the Web*Office* lobby:

1. Select the **Chat With Owner** option in the *Actions* pane of the lobby.

The *Instant Message* window opens and you are be prompted to enter specific information before the chat request is sent to the Owner. Only the **Name** field is mandatory.



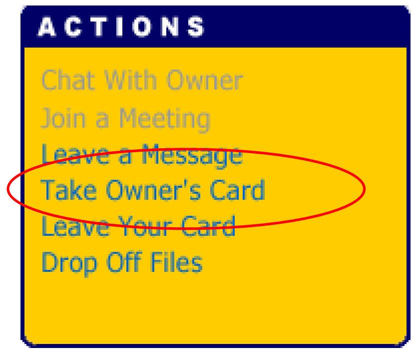
2. Enter your name, company name and your message in the appropriate fields.
3. Click the **Request Chat** button.

Retrieving the Web*Office* Owner's Business Card

Guests who visit a Web*Office* can retrieve the Owner business card. The information included in the business card is sent to the Web*Office* guest as an e-mail message.

To request the Owner's business card:

1. Click on the **Take Owner's Card** option in the *Actions* pane.



The *Take Owner's Card* window opens.

2. Enter your e-mail address.
3. Click the **Get Card** button.

Leaving a Business Card for the Web*Office* Owner

Guests can leave their business card for the Owner. The guests are requested to enter their business information, which is sent to the Owner via e-mail.

1. In the *Actions* pane, click the **Leave Your Card** option.

The *Leave your Card* window opens.

2. Enter your business information.
Only the *First Name*, *Last Name*, and *Email* fields are mandatory.

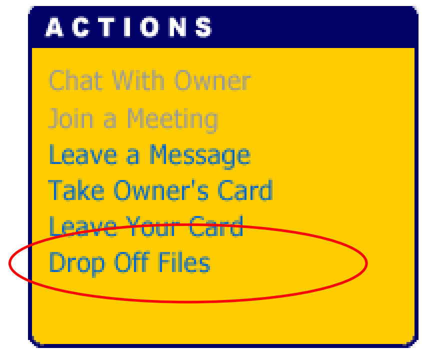
3. Click the **Leave Card** button.
The guest's business information is sent to the Web*Office* Owner by e-mail.

Sending a File to the Web*Office* Owner

Guests can send a file to the Web*Office* Owner. The files are sent as an e-mail attachment.

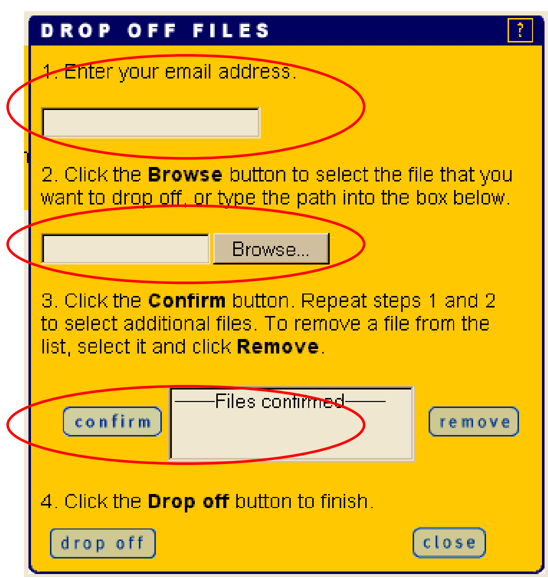
To send a file to a Web*Office* owner:

1. Click the **Drop Off Files** option in the *Actions* pane.



The *Drop Off Files* window opens.

2. Enter your e-mail address in the appropriate field.
3. Enter the path and name of the file to transfer, or click the **Browse** button to select the file from a list.



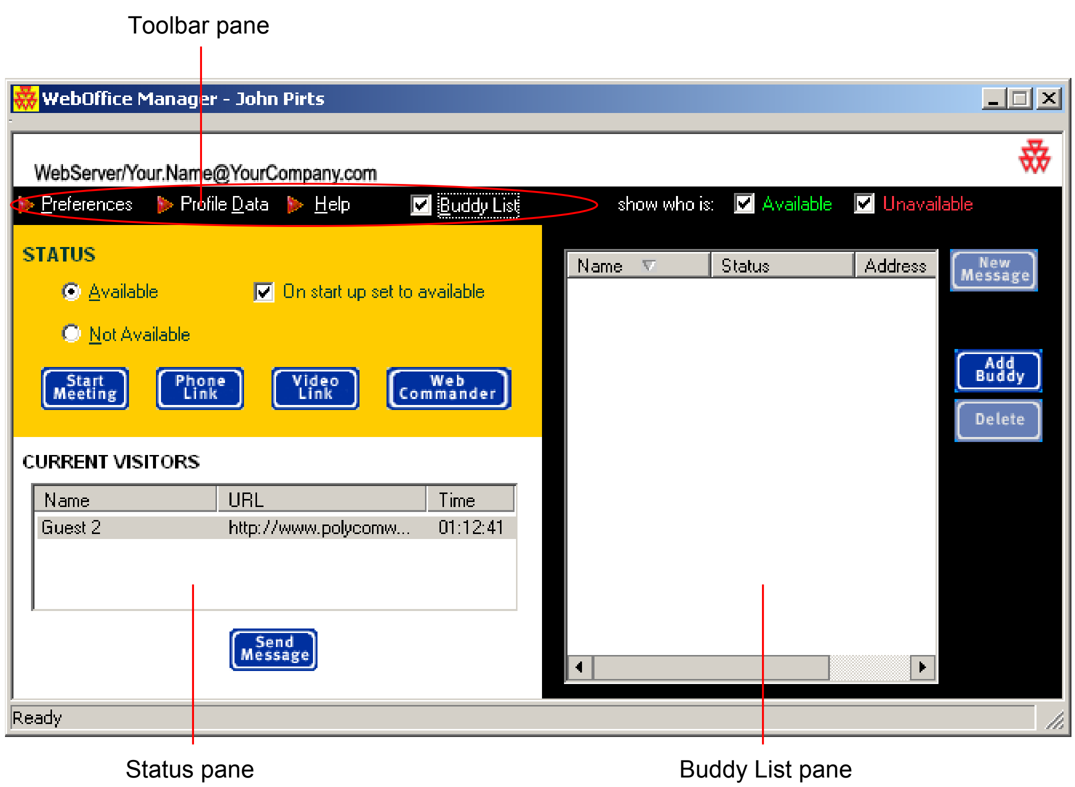
4. Click the Confirm button to add the file to the list of files to transfer.
5. Repeat steps 2 to 4 to add additional files to the list of files to be transferred to the owner.
6. Click the **Drop Off** button to send the files to the Owner.

Using Polycom Web*Office* Manager 4

Polycom Web*Office* Manager is used to manage and monitor your Web*Office* activity. The Manager is installed and it runs automatically the first time you log into your Web*Office*. Your Web*Office* is accessed by clicking the Web*Office* Manager icon on the desktop.

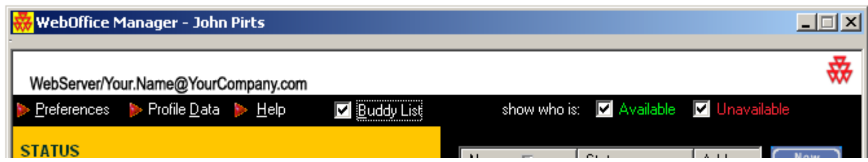
The Polycom Web*Office* Manager window includes the following panes:

- Toolbar pane - the top pane that contains preference and profile data options
- Status Pane - the left pane that contains information on current visitors and Web*Office* status.
- *Buddy* list pane - the right pane that provides the list of the owner's friends. It includes their individual addresses and statuses.

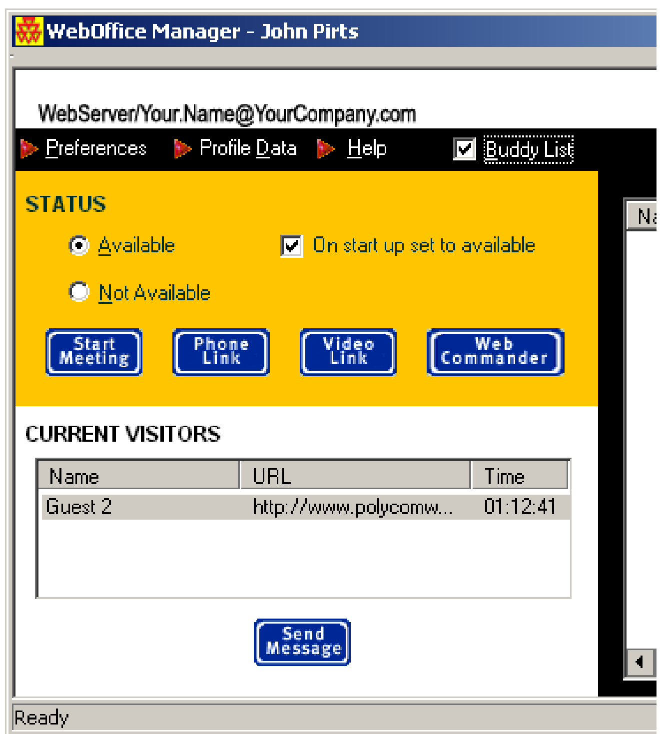


The toolbar pane provides the Web*Office* owner with the following information and options:

- Displays the Web*Office* Name
- Preferences editing
- Editing of the owner's personal profile and Business Card
- Access to Help topics
- Show/Hide the Buddy List pane



The Status pane displays your status (Available/Unavailable/Both), and the list of currently logged guests. It also provides options to start a new meeting (WebOffice, Video or audio), to access the WebCommander application or send a message to any visitor in your Web*Office*. You can modify your status by selecting the appropriate check box.



The following options are available in the Status pane:

- **Available** – Notifies guests that you are available for chat.
- **Not Available** – Notifies guests that you do not want to be disturbed while working at the office.
- **On Start up set to Available** – When checked, your status will default to Available when Web*Office* is started up.
- **Start meeting** – Initiate a meeting session by clicking on the button.

  Current visitors that are visiting your office will be seen in real-time in this window. If the guest is also a Web*Office* owner, their name will appear in the window. All other visitors appear as *guest*.
- **Phone Link** – Create a phone link for an audio conference.
- **Video Link** – Create a video link for a video conference.
- **Web Commander** – Open the WebCommander application.
- **Send Message** – Send an instant messaging/request for chat with your visitors or available buddy.

Note:
The buttons **Phone link**, **Video link**, and **WebCommander** will only be visible on the left pane if WebCommander has been installed on the same computer as Web*Office*.

Managing your Web*Office* Preferences

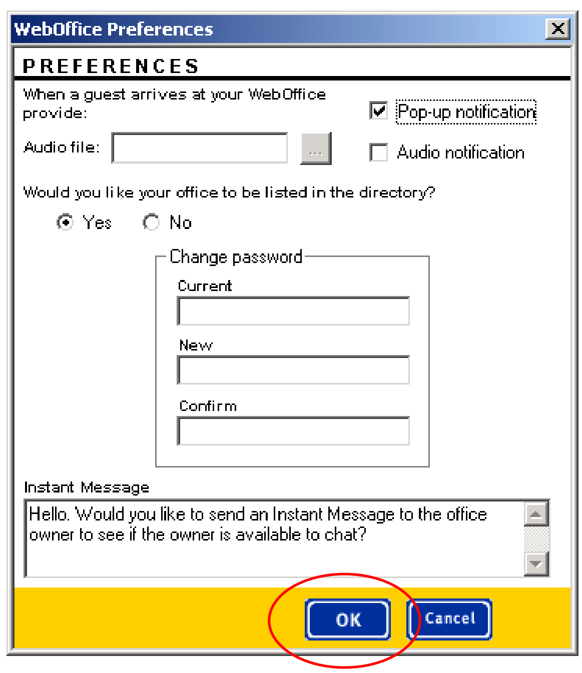
The Preferences menu allows the Web*Office* owner to configure your office settings:

- Change the method of notification when a new guest arrives at your office.
- Choose whether you want your office listed in the Meeting directory.
- Change your office password.
- Change the Instant Message Greeting for guests.

To modify your preferences use the following instructions:

1. In the toolbar pane, click the **Preferences** option.

The *Preferences* window opens.



2. Define the following options, and then **click OK**.

- **Audio file** – Browse for an audio file that Web*Office* will play when a guest arrives at your office.
- **Audio notification** – Enables audio notification when guests arrive.

- **Pop-up notification** – Enables a window that opens when a guest arrives in your office.
- **Directory listing** – Enable/disable your office listing in the directory.
- **Change Password** – Change your current Web*Office* password.
- **Instant Message** – Provide an Instant Message greeting to a guest when they visit your Web*Office*.

Managing your Web*Office* Profile

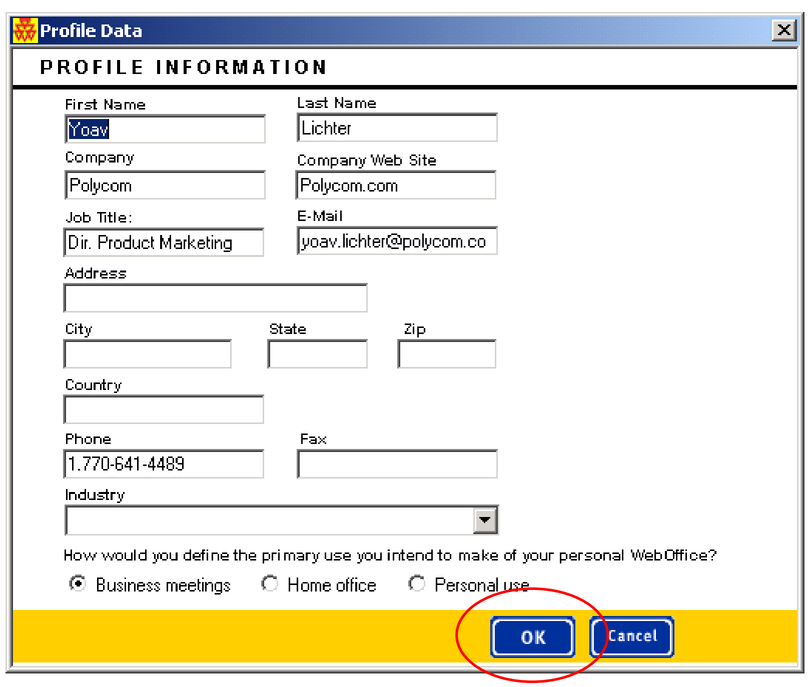
You can modify Your Profile information. This information is available to visitors to your Web*Office* and to your colleagues. Opening the Profile Data window enables you to modify the following information:

- Your personal information that can be viewed by the Web*Office* guests.
- Your contact information, including address, e-mail, phone number, and fax number.

To modify your profile use the following instructions:

1. Click the **Profile Data** option in Web*Office* Manager:

2. Modify your personal information and click **OK**.



Buddy List

The right pane of the Web*Office* Manager window lists the friends you have added to your Buddy List. For each buddy listed, the individual status and address is displayed. You can select how to show the buddies, to send a message to a buddy, or to manage your list by adding or deleting a buddy.

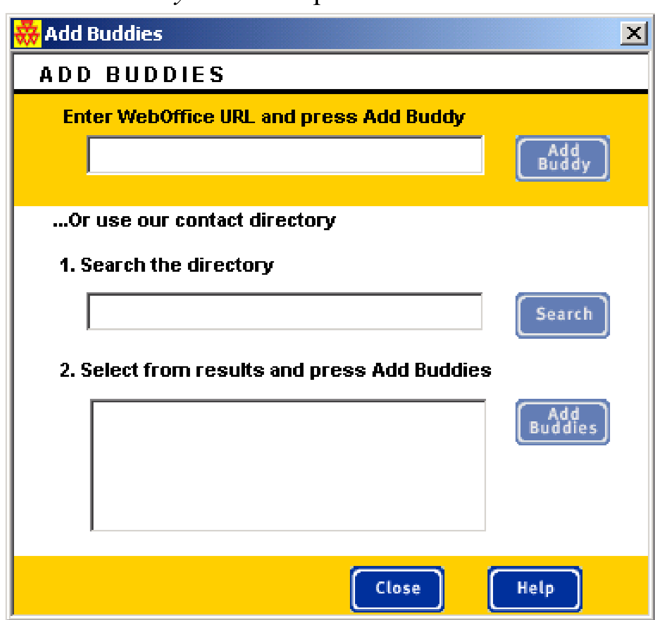
You can choose to show only those buddies that are available or unavailable, or both, by selecting the appropriate check box at the top of the pane.

Adding a Buddy

To add a buddy to the list, you can either enter another user's Web*Office* address, or search for it in the *Add Buddies* window that opens after the option is selected.

1. Click **Add Buddy**

The *Add Buddy* window opens.



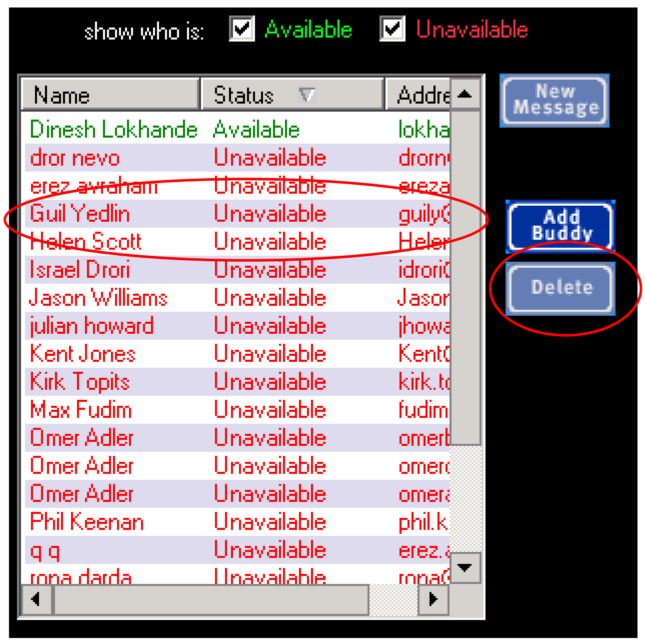
You can add the WebOffice address of the buddy, or search for your friend in the *Search the Directory* field.

2. Enter the Web*Office* of the buddy to add.
3. If you do not know the address of a buddy you wish to add, use the search feature:
   - Enter the partial Web*Office* address or name of a buddy you wish to add.
   - Click **Search**.
   - Select the buddies from the search results
4. Click the **Add Buddies** button.

Deleting a Buddy

You can delete a buddy from your list.

1. In the *Buddy* list, select the name of the buddy to delete.
2. Click the **Delete** button.

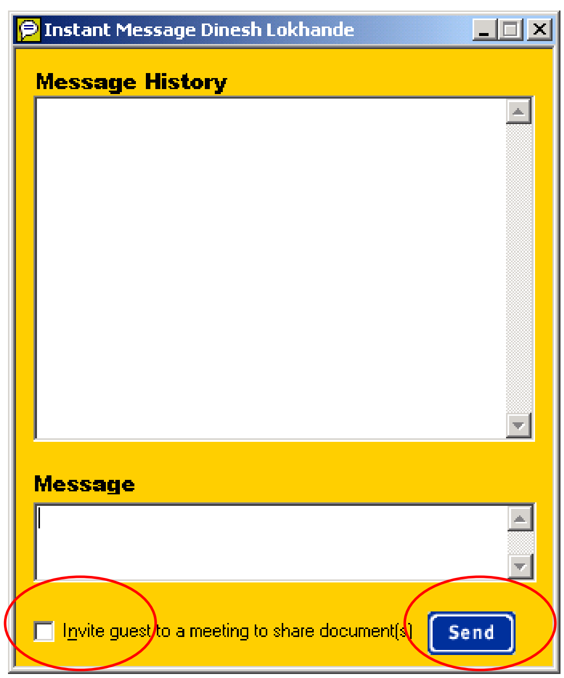


Sending an Instant Message to a Buddy

You can send an instant message to a buddy whose status is Available.

1. In the *Buddy* list, select the name of the buddy to whom to send an instant message
2. Click the **New Message** button.

The *Instant Message* window opens.



This window remains open throughout the entire Instant messaging session, displaying the messages sent during the session.

3. To invite the selected buddy to your Web*Office* meeting, select the **Invite guest to a meeting to share documents** check box.
4. In the *Message* field, enter the message you want to send.
5. Click the **Send** button.
6. The message is sent to the Buddy. If you have selected to invite the guest to your meeting, link to your Web*Office* meeting is added to the message. When the guest clicks this link she/he is automatically connected to the meeting.

Sending Instant Message to a Visitor

To initiate an Instant Messaging session with a guest:

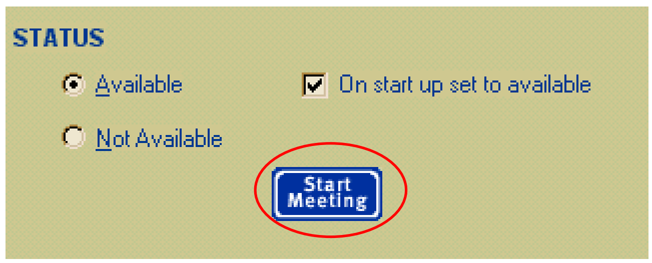
1. In the Web*Office* Manager's *Status* pane, *Current Visitors* window, select the guest's name.
2. Click the **Send Message** button.

Starting a Web*Office* Meeting

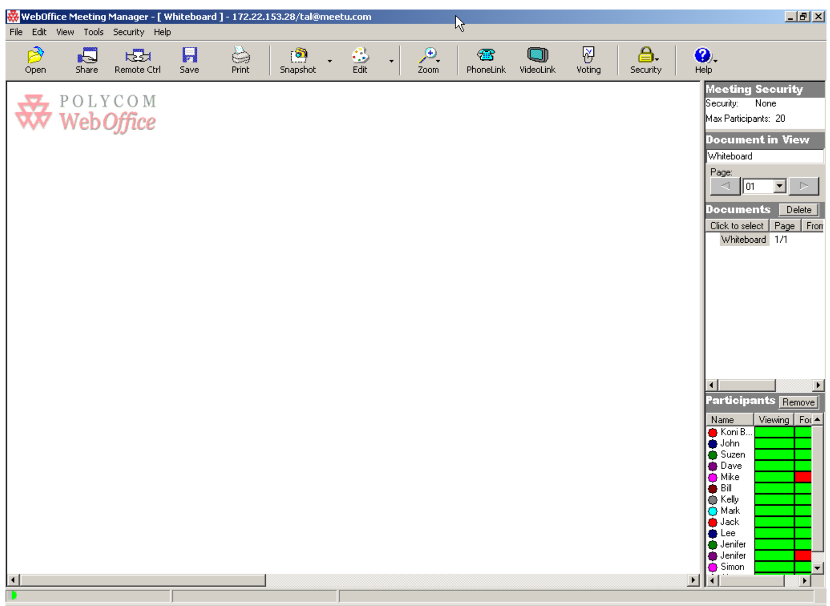
Any Web*Office* client can start a meeting. Once the meeting is started, the client is considered the Owner of the meeting and has complete control over the activity in the meeting, unless he/she hands over the control to a participant.

To start a Web*Office* Meeting:

1. In the *Status* pane, click the **Start Meeting** button.



The *WebOffice Meeting Manager* window opens.



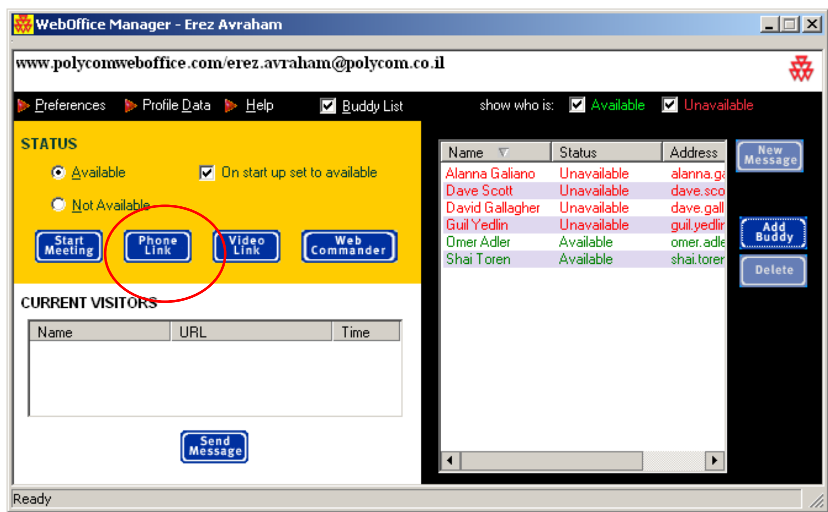
This window is described in Chapter 4.

Create Audio Conference through Polycom Web*Office* Manager

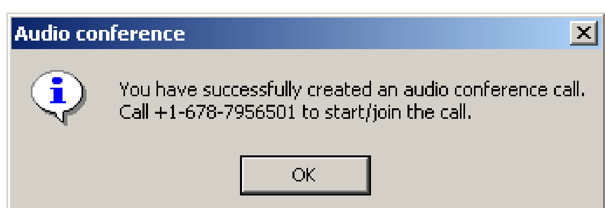
You can create an Audio Conference directly from the Web*Office* Manager window. When initiated, the system automatically schedules the conference and notifies guests of their invitation to the conference and provides the phone number to call to connect to the audio conference.

To initiate an Audio Conference:

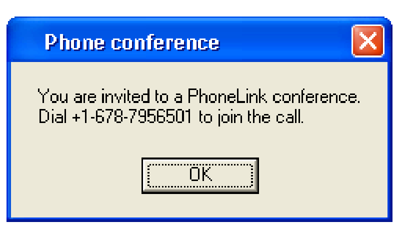
1. In the WebOffice *Manager* window, click the **Phone Link** button.



The *Audio Conference* window opens on the meeting owner screen.

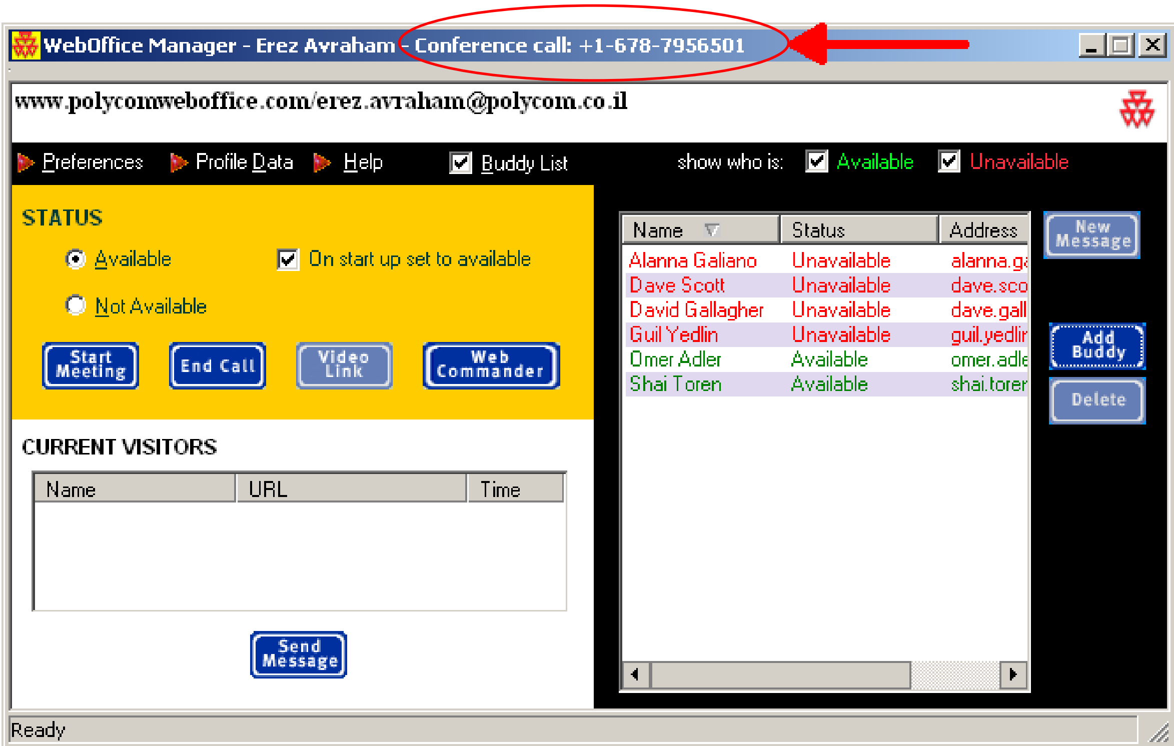


The *Phone Conference* window opens on all meeting participants screens.



The *Audio/Phone Conference* window displays the phone number assigned to the conference call. The meeting owner and the meeting participants have to dial this number to connect to the conference.

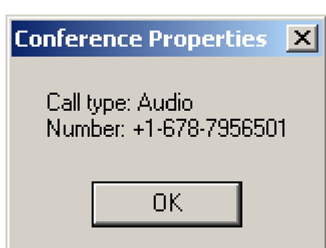
The audio conference phone number is displayed on the Web*Office* Manager and Web*Office* Meeting Manager title bar.



Viewing the Conference Phone Number

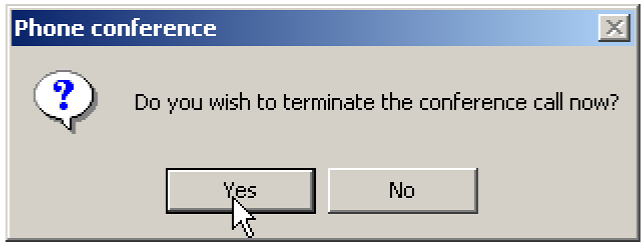
2. Start an audio meeting.
3. On the **Tools** menu, click **A/V Link,** and then click **Conference Properties**.

   The *Conference Properties* window opens, displaying the conference type and phone number.



Ending the conference call

4. In the Web*Office* Manager window, click **End Call.**
   The *Phone Conference* window opens.
5. Click **Yes** to confirm the termination of the call.



6. Click **Yes** to terminate the call.
   A notification window opens on all the conference guests' screens, informing them that the audio conference is about to end.

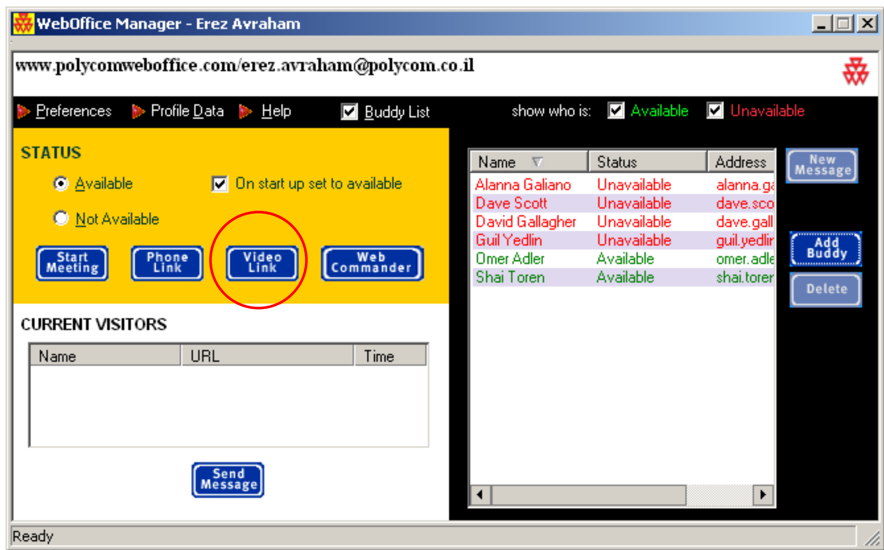
7. Click **OK**.

Create Video Conference through the Web*Office* Manager

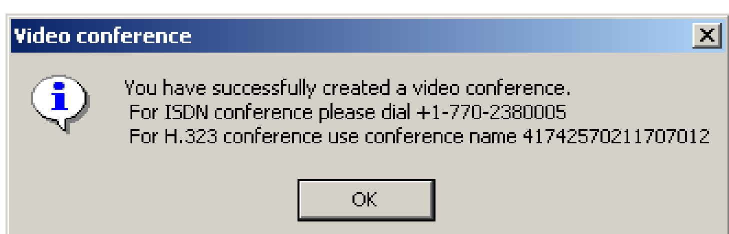
You can create a Video Conference directly from the *WebOffice Manager* window. When initiated, the system automatically schedules the conference and notifies guests of their invitation to the conference and provides the phone number(s) to call to connect to the video conference.

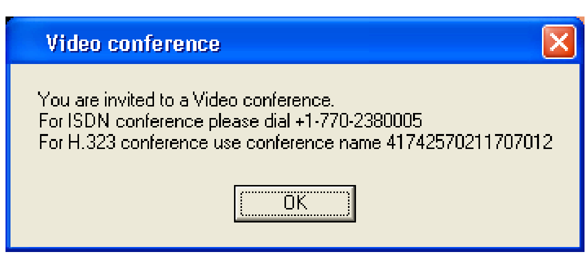
To initiate a Video Conference:

1. In the Web*Office Manager* window, click on the **Video Link** button.



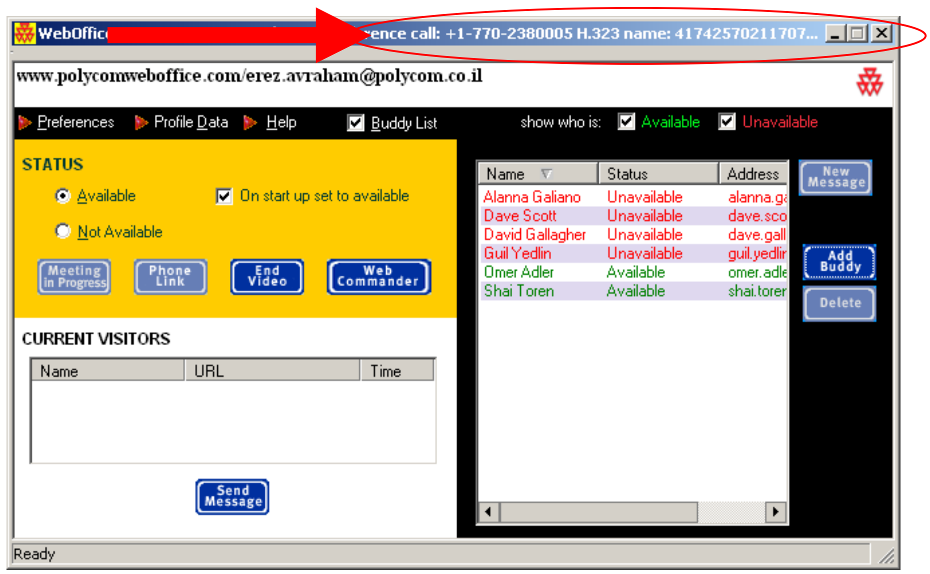
The *Video Conference* window opens on the meeting Owner screen and also on the guests' screens.





The *Video Conference* window displays the Video ISDN number(s) and H323 number (conference alias name or IP address) assigned to the video conference. The meeting owner and the meeting participants have to dial these numbers to connect to the conference.

The video conference ISDN numbers and H.323 alias are displayed on the Web*Office* Manager and Web*Office* Meeting Manager title bar.

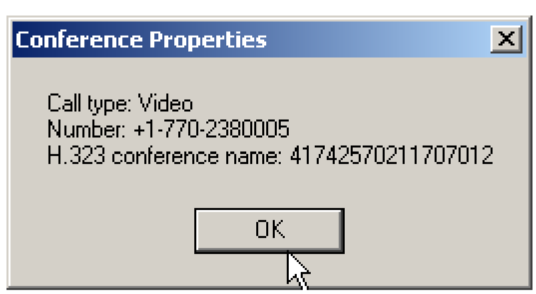


Note:
To dial a H323 number, you should type in the MCU Prefix and then the H323 number. The MCU Prefix is unique to each MCU and is assigned in the MGC Manager application. For more information, refer to the MGC Manager Administrator's Guide. For help, contact your system Administrator or Polycom Support.

Viewing the Conference Number

1. Start a video meeting.
2. On the **Tools** menu, click **A/V Link,** and then click **Conference Properties**.

   The *Conference Properties* window opens, displaying the conference type and phone numbers.



Ending the conference call

1. In the Web*Office* Manager window, click **End Call.**
   The *Video Conference* window opens.
2. Click **Yes** to confirm the termination of the call.
3. Click **Yes** to terminate the call.

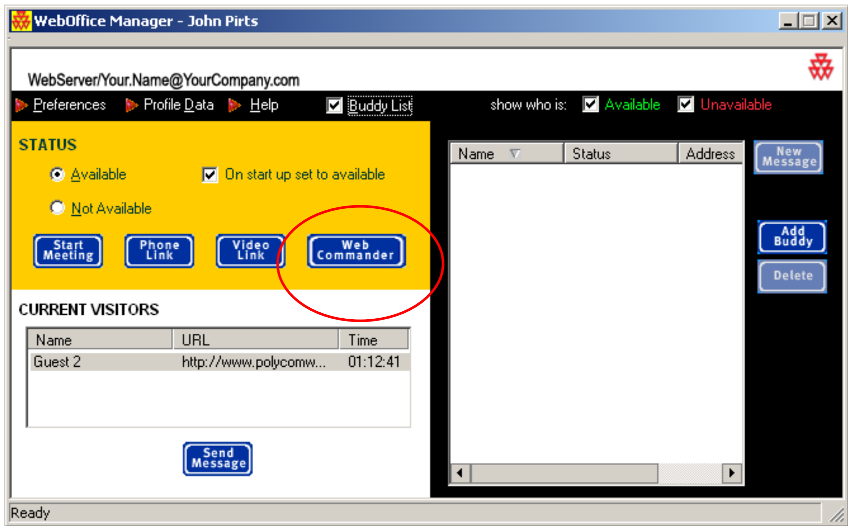
   A notification window opens on all the conference guests' screens, informing them that the audio conference is about to end.

4. Click **OK**.

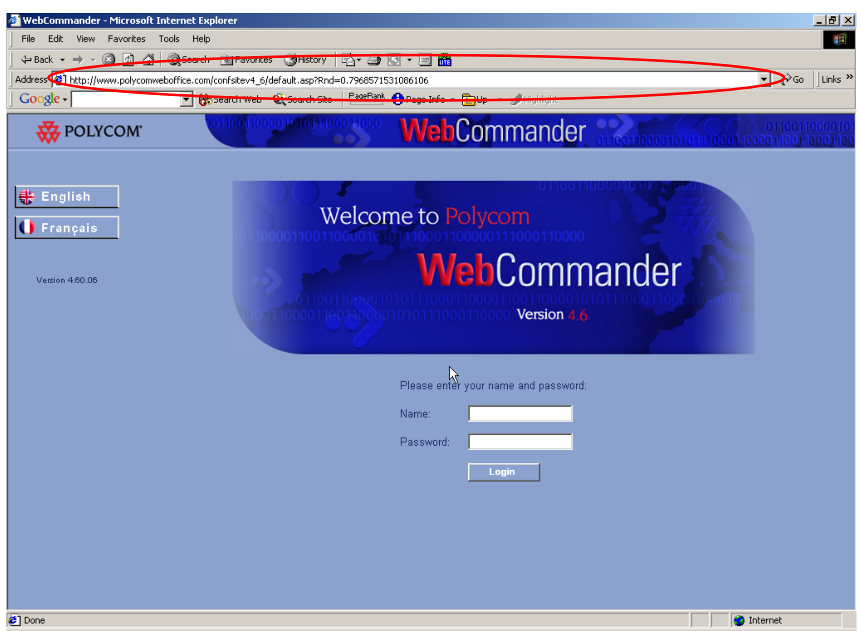
Accessing the WebCommander from WebOffice Manager

You can access the WebCommander application from the *WebOffice Manager* window. The WebCommander application enables you to monitor your audio and video conferences using any Web browser.

In the *WebOffice Manager* window, click the **WebCommander** button.



The default Web browser window opens, displaying the WebCommander login window. The WebCommander address (e.g. *http://WebCommander IP/ConfSiteV4_5*) is displayed in the Web browser's *Address* box.



Holding a Web*Office* Meeting 5

Meeting Overview

A Web*Office* meeting is a web-based session in which multiple guests can collaborate on ideas while sharing documents, applications, and screenshots. Meeting participants use the Polycom Web*Office* Meeting Manager software to join the meeting, load documents and applications, and to make on-screen annotations. The Owner of the meeting uses the Polycom Web*Office* Meeting Manager to direct the flow and focus of the meeting. The Web*Office* Meeting Manager features include:

- Invite guests
- Secure the meeting and its content
- Select documents to display
- Share applications
- Save the meeting contents

Before a Meeting

Prior to starting a Meeting you can:

- Secure the Meeting by specifying a password that all guests must enter to join
- Limit the number of guests in the Meeting
- Upload documents to the Web*Office* that will be used during the Meeting

During a Meeting

When you start a meeting, the Web*Office* Meeting Manager displays a blank Whiteboard screen on which you can draw freehand diagrams and post text messages using the Annotation Tools.

Both you and your guests can open documents, or capture and share screen snapshots. Several documents can be opened simultaneously in a Meeting. However, at all times, the Web*Office* owner controls which document or snapshot is displayed to everyone.

Meeting participants can use the Annotation Tools to draw or write on the document, with various shapes or arrows to clarify a point, just as they would on the Whiteboard. Each participant's notations are displayed in a unique color.

You may also choose to share an application in real-time with the meeting participants. Application Sharing enables your guests to view any application running on your computer. As you make changes and navigate throughout the application, your guests can see your computer screen - but only for the application you select.

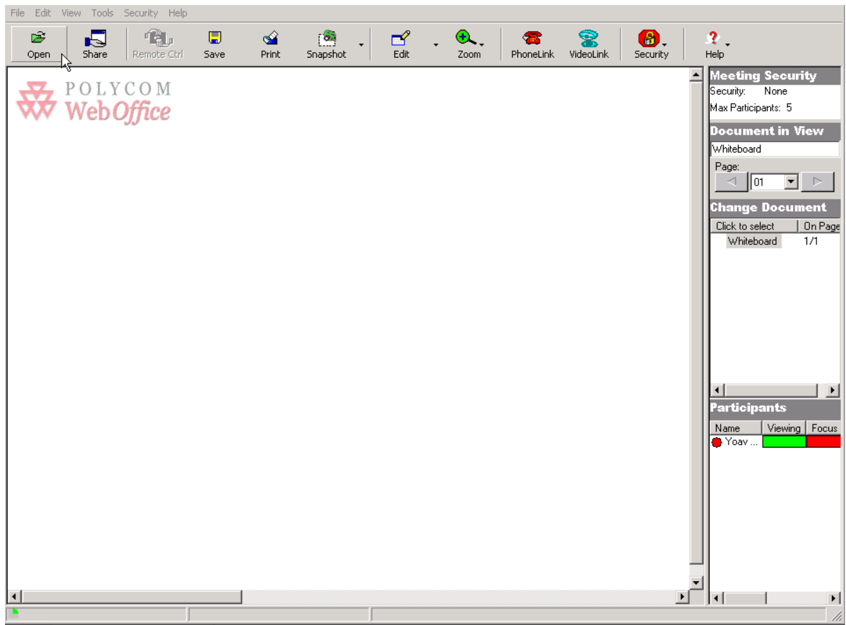
You maintain complete control of which window is displayed to guests.

After a Meeting

When a Meeting ends, you can save it in the Web*Office* for later use. Saved Meetings contain the presented documents, along with participants' markings and annotations.

The Meeting Manager

The Web*Office* Meeting Manager window opens on the desktop when a meeting is initiated by a Web*Office* owner. The Meeting Manager provides functionality for document and application sharing, a whiteboard for freehand drawing and comments, and participant status.

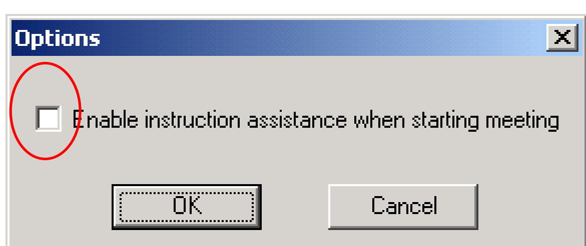


Hiding the Instructions Box

A message box providing instructions on how to invite guests opens when you login to your Web*Office*, by default.

To hide this message window:

1. On the **Tools** menu, click **Options.**
   The *Options* dialog box opens.
2. Clear the **Enable instruction assistance...** check box, and then click **OK**.



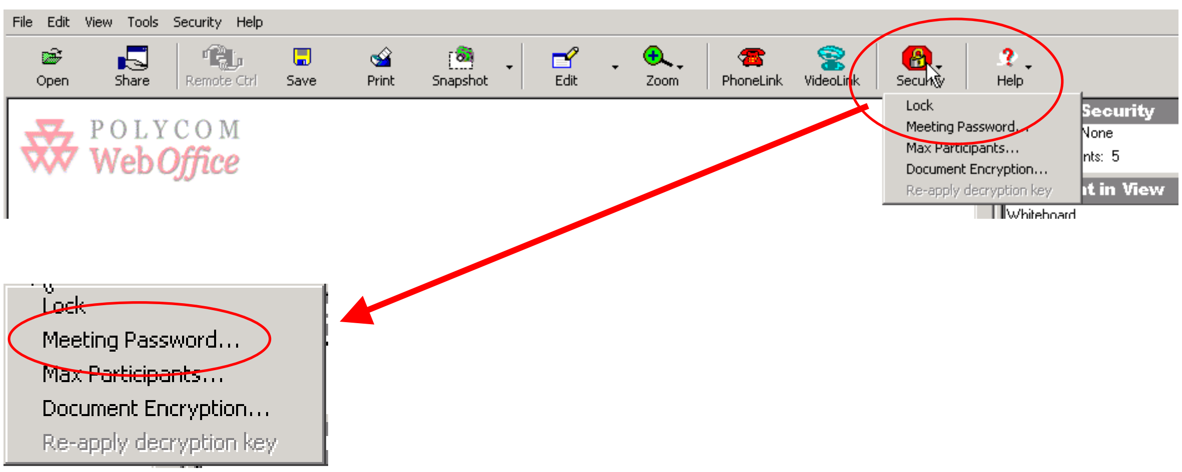
Working with Guests

Running Secure Meetings

You can prevent uninvited guests from joining a meeting in progress by defining a guest password. If a password has been defined, a *Password* field appears in the *Guest Login* box. Guests will be admitted to the meeting only after typing the correct password. You can also limit the number of guests, or lock the meeting. Guests can receive a meeting password via email, chat or on by phone.

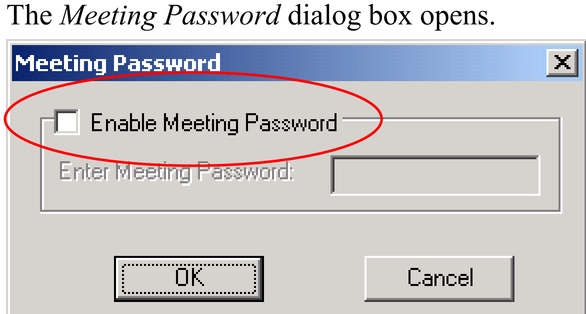
Running Secure Meetings - Defining a Guest Password

You can prevent uninvited guests from joining an ongoing meeting by defining a guest password. Once a password has been defined, a *Password* field appears in the *Guest Login* box. Guests will be admitted to the meeting only after typing the correct password.



3. On the *Security* menu, click **Meeting Password**. Alternatively, on the toolbar, click the *Security* icon and then click **Meeting Password** on the pop-up menu.

   The *Meeting Password* dialog box opens.



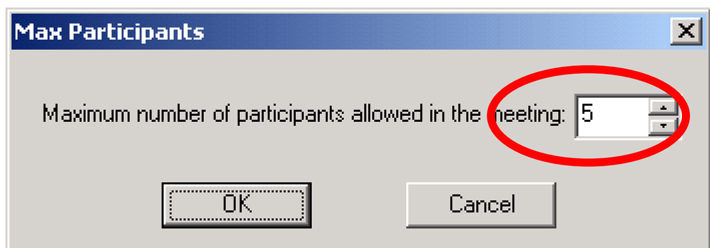
4. Select the **Enable Meeting Password** check box.

5. In the *Enter Meeting Password* field, type a password of 4 characters or more.
6. Click **OK**.

Limiting the Number of Guests in a Meeting

The Max Participants option enables you to set the maximum number of meeting participants. If the limit is reached, your status will change to Unavailable.

1. On the *Security* menu, click **Number of Participants**. Alternatively, on the toolbar, click the *Security* icon, and then click **Number of Participants** on the pop-up menu.
   The *Max Participants* window opens.
2. Set the Maximum number of guest participants field to between 1 and 120.



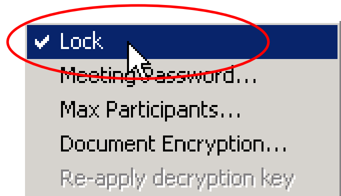
3. Click OK.

Note:
The number of supported participants depends on meeting usage and server capacity.

Locking a Meeting

You can lock an ongoing Meeting, in order to prevent new guests from joining.

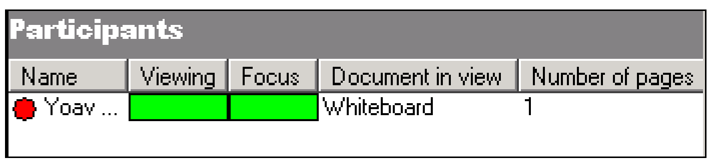
On the *Security* menu, click **Lock**. Alternatively, on the toolbar, click the *Security* icon, and then click **Lock** on the pop-up menu.



The meeting remains locked until the meeting ends or is unlocked. A check mark next to the Lock option indicates that the meeting is locked.

The Participants Pane

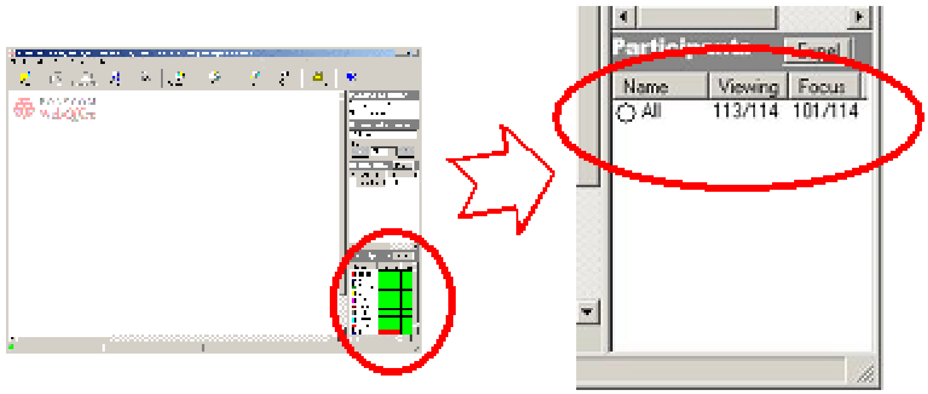
The *Participants* pane enables every participant in the meeting to monitor the status of other participants in the meeting. The *Participants* pane displays the following information:



Field	Description
Name	Identifies each participant by name and color assigned to their Annotation tools. The Owner's tools are always red.
View	Shows whether a participant can see the updated pages and annotations display. A red signal means the display is being updated. The green signal indicates that participants' display is updated with the recent changes.
Focused	Shows whether a participant is currently focused on the Meeting Manager window. A red signal means that the meeting window is not the active window on their computer. When focused, the signal turns green.
Document in view	Shows the currently selected document. When another document is selected and displayed, the new document name appears in each participant's line.
Number of pages	Shows how many pages of the selected document have already been retrieved from the Office. If a page is selected outside of the normal sequence, it is retrieved immediately and its number displayed before the other pages numbers.

Dynamic Participant "Viewing/Focus" indicator

The Web*Office* client automatically changes into an accumulative feedback mechanism for large meeting sessions. It is based on a predefined participant threshold, as shown in the figure below.



The individual participant status indicators disappear and are replaced with one indicator indicative of the whole group.

Working with Documents

The Web*Office* Meeting Manager allows you and your guests to collaborate across the Web and share documents and applications. The application includes easy-to-use tools that are accessible both from the menus and from toolbar. The Meeting Manager displays the active document in the large left windowpane. In the right windowpane, the Meeting Manager displays the following information about the current meeting:

Document in View

Shows the name of the document currently displayed and allows you and the meeting owner, to navigate through the pages within the document.

Change Document

Lists all documents open in the current meeting and allows the meeting owner to select which one to display.

Participants

Displays a list of all the meeting participants and enables everyone to monitor the status of other participants:

- **Viewing** – This feature helps you pace your presentation by indicating whether or not everyone is seeing the same display. A red viewing button next to a participant's name indicates that their display is not yet synchronized to the latest changes. When the Viewing button turns green, it means that both participants are seeing the same thing.
- **Focus** – This feature informs you if the *Meeting* window is active on a specific guest‘s computer. When the guest has the meeting in focus the button is green. When the guest does not have the meeting in focus the button turns red.

You can toggle between hiding and viewing the right pane by selecting **Right Pane** in the *View* menu.

Document Encryption

Use encryption to secure the documents that you display in a Meeting. You can use the same encryption key for all or some of your documents, or use a different key for each. The Meeting guests must enter the encryption key before they can view the document.

Encryption Procedure

During the Upload or Open procedures, the encryption dialog box appears. The dialog options are:

Don't encrypt this document - If selected, you can choose not to encrypt any document. In this case the encryption dialog box will not appear again. You can later change this setting from the *Security* menu.

Encrypt - Type an encryption key, and send it to your guests.

Opening Documents in a Meeting

Documents can be opened as follows:

From the Web*Office* Meeting Manager

Select **Open** from the *File* menu or the toolbar, and navigate to the desired document.

This is the only method available to the participants. You can open a document that is stored either in your local computer or in your Web*Office*.

From Windows Explorer

Use the drag-and-drop or copy/paste actions to add the document to the *Active Meeting* folder under the Web*Office* directory.

From an Application

1. Open the desired file
2. Save it to the Active Meeting folder under Web*Office*.

   To display the document in the Web*Office* Meeting Manager, select it in the Change Document section.

Notes
The first page can be viewed before the whole document is retrieved.
Only the Web*Office* owner can select the documents and pages to be displayed.

The Status Bar

The Status Bar tracks the process of opening a document. The Status Bar represents every document or snapshot that is opened in a Meeting by two blue flashing circles and a progress bar.

When several Open processes take place at the same time, click the corresponding circle to display the progress bar of the document it represents. By default, the progress bar represents the most recent action.

To cancel Opening a document,

Click the red “X” icon next to the progress bar and select the desired process from a list.

Note:
When you cancel a process, all pages that are already loaded will be available in the Meeting Manager.

Uploading Documents to the Web*Office*

You can upload documents at any time - before, after, or during a meeting. It is recommended to upload your documents before the meeting starts in order for them to be available right away at meeting time.

You can upload a document in any of the following methods:

From the Web*Office* Meeting Manager

1. Select **Upload** from *the Tools* menu.
2. In Windows Explorer, right-click the file and select **Upload.**

   or

   Use the drag-and-drop, or copy/paste actions to add the document to the *Documents* folder inside the Web*Office* directory.

   - From an Application
   - Open the file, and save it to the Documents folder under WebOffice.

   or

   Open the *Print* dialog box, select **Publisher** from the printers list and print the document.

Note:
To view the document correctly in the Web*Office* Meeting Manager, set its page size to A4 before printing.

Note:
The Uploading procedure only copies documents to your Web*Office*. To display the document in the Web*Office* Meeting Manager, you must open it.

Viewing, Annotating and Navigating Documents

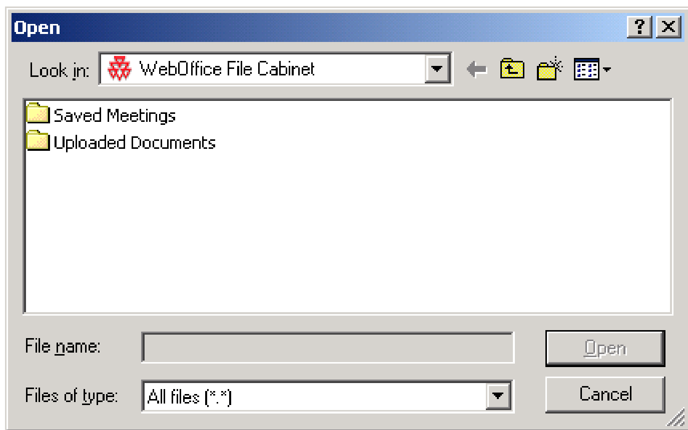
Managing Documents and Meetings

When you open a Web*Office*, a Web*Office* icon is added to your Desktop. Selecting the Web*Office* icon from the Desktop, or Windows Explorer, displays the contents of your Web*Office* as folders. These folders are:

Active Meeting - Contains the documents and snapshots open in the current meeting.

Saved Meetings - Contains a list of your saved meetings.

Documents - Contains a list of the documents saved in the Web*Office*.



Selecting Documents for Display

The documents and snapshots currently open in a meeting appear in the *Change Document* section. To display an item, select it from the list.

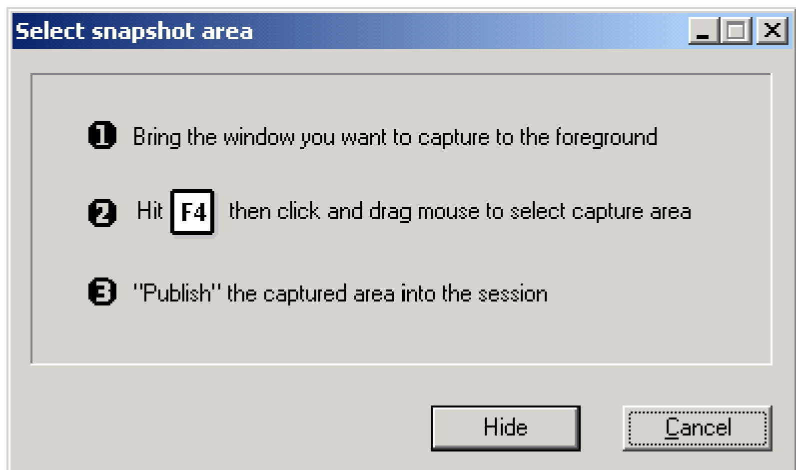
Note:
Only the Web*Office* owner can select documents.

Taking a Snapshot

You can capture your current screen, or part of it, and open it in the active session.

Note:
The first time you use the Snapshot command, the required software is downloaded and installed on your computer. This may take one or two minutes.

1. From the *Snapshot* toolbar or the **File→ Open** menu select:
   Active Window Snapshot, to capture the whole screen,
   or **Selected Area Snapshot**, to capture a rectangular area.
2. A dialog box guides you through the Snapshot process.
   Click **Hide** to minimize the dialog box.



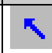
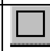
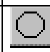
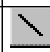
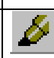
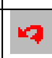
When the screen capture ends, the *Preview* window opens. If you are not content with the result, click **Recapture** to take another snapshot.

4. Click **Publish** to send the Snapshot to the meeting. A *Loading* progress bar appears during the process.
5. Select the snapshot from the *Change Document* section. The snapshot appears as Snapshot (n) where "n" represents the sequence number.

Using Annotation Tools

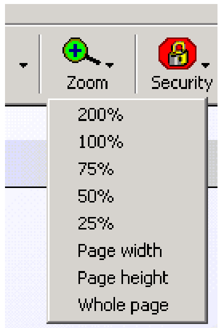
The Annotation tools, under the Edit menu or flyout, are used to mark and annotate the displayed page. Only one tool can be selected at a time. After selection it remains in an active state until another tool is chosen. Each participant in a session has his/her own tool color, indicated in the *Participants* section.

Following is a description of the available tools:

Tools	Icon	Description
Single pointer		Place a pointer on the displayed page. Every mouse click moves the single pointer at the cursor location.
Multiple pointer		Place several pointers on the displayed page. Every mouse click adds a new pointer.
Rectangle tool		Draw a rectangular frame on the displayed page. To draw a frame, click and drag the left mouse button from one rectangle corner to the opposite one.
Ellipse tool		Draw an elliptical frame on the displayed page. To draw an ellipse, click and drag the left mouse button.
Line tool		Draw a straight line on the displayed page. To draw a line, click and drag the left mouse button from the line's beginning point to its end.
Text tool		Annotate the displayed page. Click where you want to add an annotation and type the text. To start a new line click **Enter**. To finish writing, click anywhere on the screen.
Free Hand tool		Draw a curve line on the displayed page. To draw a curve, click and drag the left mouse button from the curve's starting point to its end.
Marker tool		Highlight text or any other part of the displayed page, including shapes. To use the marker, click and drag the left mouse button from the line's beginning point to its end.
Undo last		Undo the recent action. Repeat to delete previous annotations in reverse order.
Clear All		Clear all annotations from all documents. When used by the owner, all the participants' annotations are deleted.

Using the Zoom Control

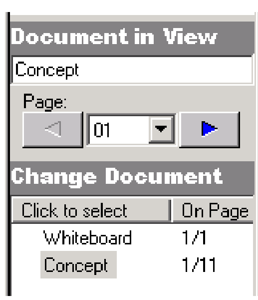
With the Zoom control, you can adjust the display size to fit your local display setting, or focus on special points of interest. The Zoom function is not synchronized between participants, allowing each participant to select his/her own scaling.



1. Click the **Zoom** button, or select **Zoom** from the *View* menu.
2. Select the desired scaling from the list.

Working with Multi-page Documents

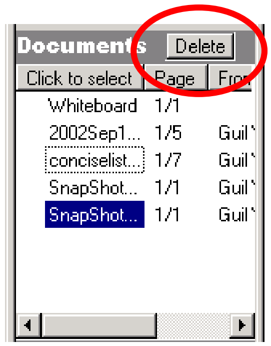
To display a specific page of the current document, select it in the **Select Page** list under **Document** in the *View* menu. Use the Backward/Forward buttons to browse through the displayed document.



Note:
Only the *Office* owner can select pages. If the right pane is hidden, the **Backward** and **Forward** buttons will appear on a small toolbar. Annotation tools remain in the document and are saved when jumping from page to page.

Deleting a Document from the Meeting

Delete Document from meeting enables the owner of the meeting to delete or remove a particular document from an existing meeting. To delete a document from the meeting, the owner selects the appropriate document and clicks the **Delete** button, as indicated in the figure below. It is also possible to delete the document by right clicking on the document's name and selecting **Remove Document** from the menu.



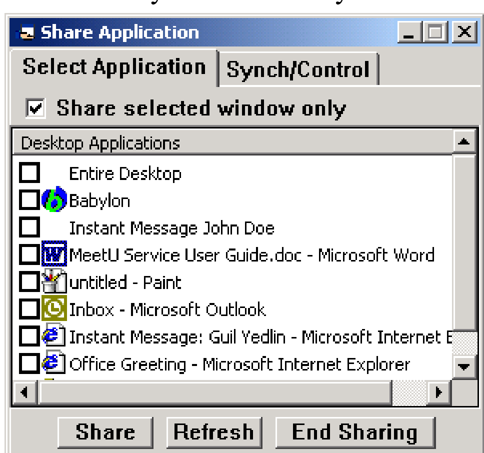
Application Sharing

Using the Application Sharing feature, you can share (with guests) any application that is running on your computer. Guests will only see the application you select.

Sharing an Application

Open the Application. An application must be running before you can share it in the meeting.

1. Select **Share Application** from the *File* menu or click the **Share** button from the main toolbar.
2. Select the desired application in the *Share Application* window.
3. To display only the active window, select **Share Selected Window only**.
4. Deselecting this option will show your guests all windows running the selected application.
5. Click the **Share** button to display the selected application on the screens of all guests in the meeting. The *Share Application* window is automatically minimized to your task bar.



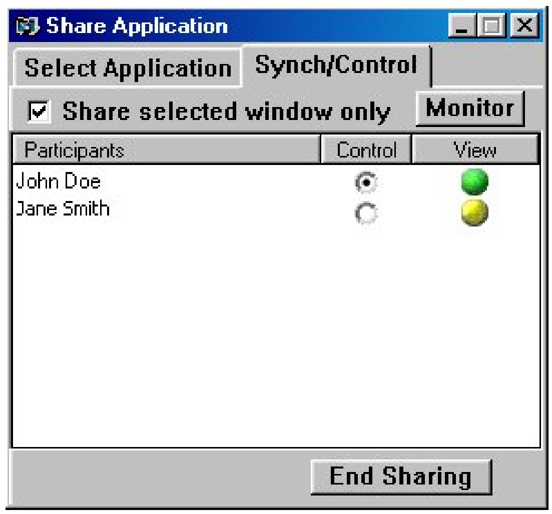
6. Bring the *Share Application* window into focus to change or end application sharing:
7. Highlight another application and click **Share** to begin sharing another application.
8. Click **Entire Desktop** to share your entire desktop.
9. End Sharing will stop sharing the current application but will leave the *Application Sharing* window running on guests' computers.
10. Click **Refresh** to update the list of available applications if you wish to share an application that was not running when you launched application sharing.

11. Click **End Sharing** to terminate application sharing.
12. Click the **Synch/Control** tab to delegate the control to one of your guests:

Only one participant can be in control at a time.

To hand over the control over the documents

1. Click your mouse to gain back control
2. Use the Synch color indication to know your guest status –
   - **Green** – Guest's Application Sharing viewer is synchronized
   - **Yellow** – Guest Application Sharing viewer is about to be synchronized – no updates are being sent – only communication delay
   - **Red -** Guest Application Sharing viewer is not synchronized



Note:
You can share only one application at a time. Selecting another application replaces the application on the screens of your guests.

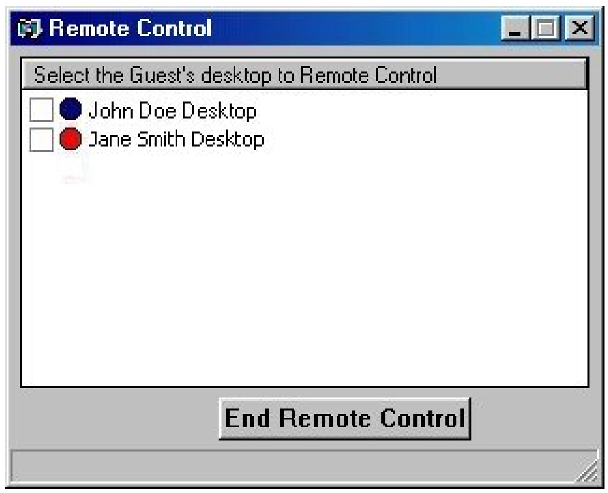
Desktop Sharing

Desktop Sharing allows the owner of the Web*Office* to take over the guest's PC. If a desktop sharing is taking place, both the owner of the Web*Office* and a guest can share a running application.

Sharing a Desktop

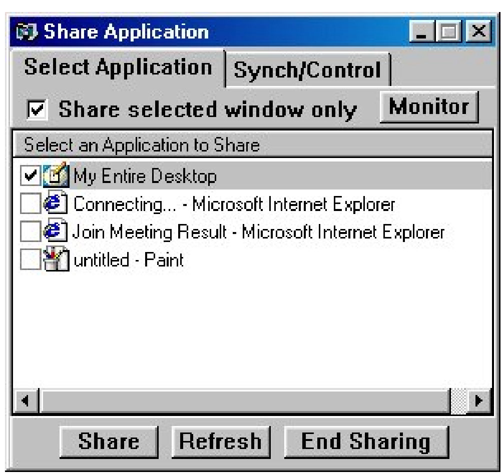
1. Select Remote Control from the File menu or select the Remote Ctrl icon from the main toolbar.

   A Remote Control window is opened with the list of guests, participants in your Meeting.



2. Select one of the guests in the list, to share a desktop.

   At the guest's computer, after the guest's confirmation, a *Share Application* window is opened, in which the guest can select whether to share the entire desktop or just a running application.

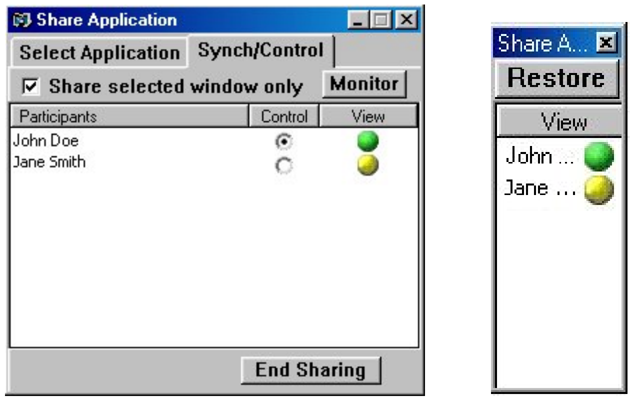


Role Delegation In Application Sharing

The owner of the Web*Office* has, by default, the control over the Meeting and over the Desktop Sharing. However, the control can be given to one of the guests, by using the right tab in the Remote Control window. The owner can grant the control over the session to each of the guests.

The guest, in the right tab of the *Share Application* window (Synch/Control) selects the participant to grant the control to.

This window can be minimized and restored for convenience.

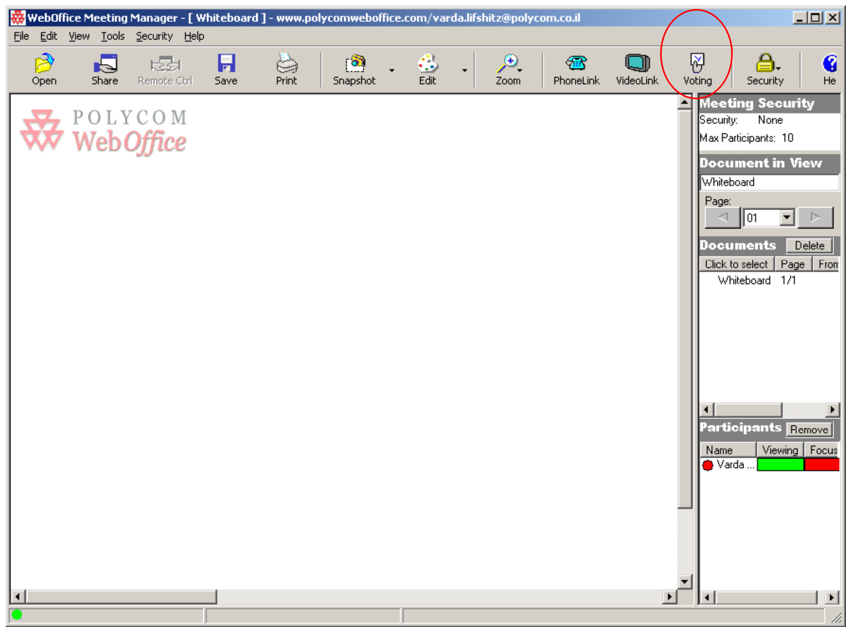


Voting

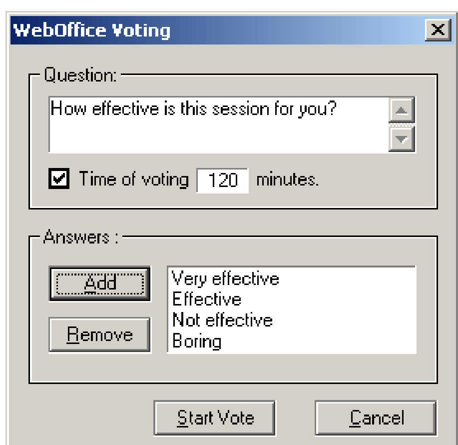
Voting provides an automated mechanism for the meeting owner to query the meeting participants and receive immediate feedback from them on the results of the query.

Activating the Voting Feature

1. On the Meeting Manager toolbar, click the “**Voting**” icon or on the **Tools** menu, click **Voting**.

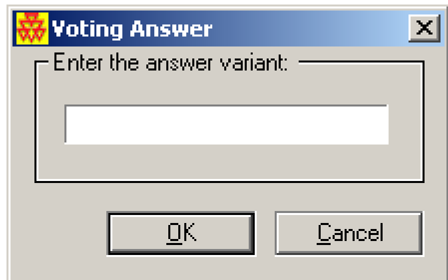


The *WebOffice Voting* window opens.



2. In the *Question* box, enter the vote subject/question.

3. In the *Time of Voting* box, define the duration of the Voting session. Clearing the *Time of Voting* check box results in unlimited voting duration.
4. To add the Vote options, click the **Add** button. The *Voting Answer* dialog box opens.



5. In the text box, enter the text for the first choice and click **OK**. The new Voting choice is added to the *Answers* list.
6. Repeat steps 5 and 6 to define additional Voting choices.

Note:
To remove one of the Voting choices, click the choice to remove in the *Answers* box, and click the **Remove** button.

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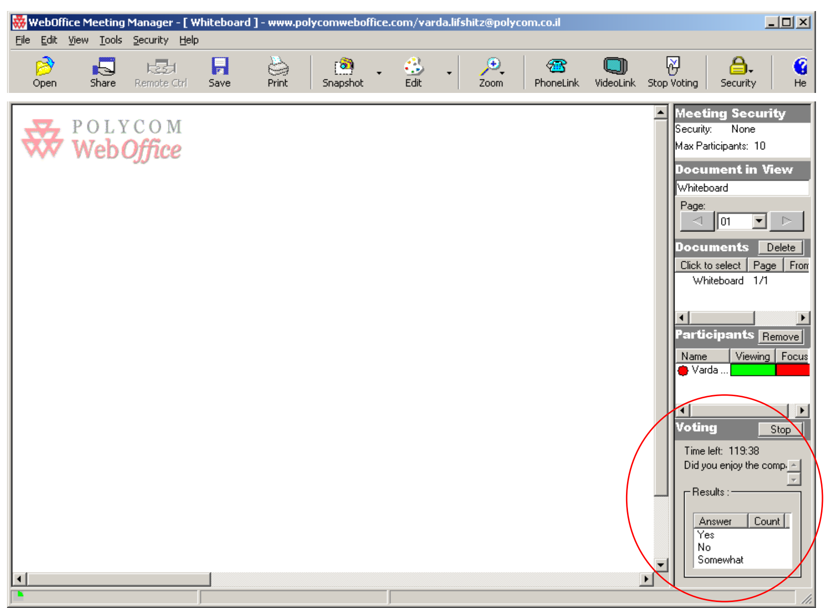
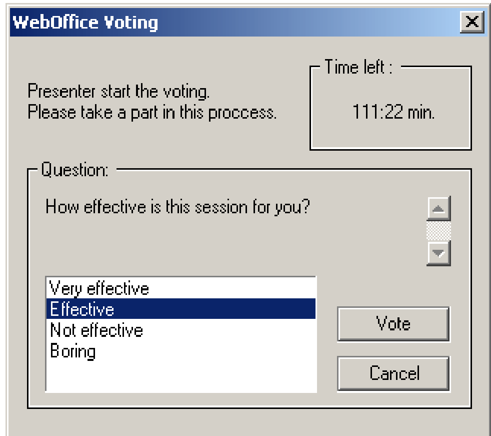
7. When you have finished defining the voting subject/question and its choices, click the **Start Vote** button.
8. The Voting session status is displayed in the WebOffice Meeting Manager window and can be monitored at any time.

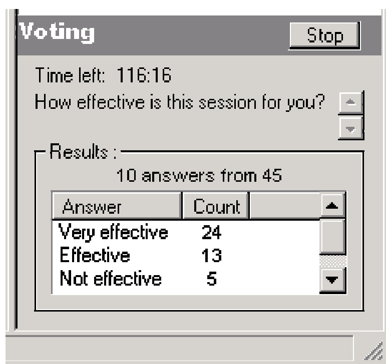


9. The new Vote is submitted to all participants. Each meeting participant selects an answer from the *WebOffice Voting* dialog box and clicks the **Vote** button.



The vote is sent back to the owner and is tallied with polling information.

10. The Owner is then provided with a real time update of voting results, as shown in the figure below.

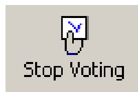


Note:
- The subject of angoing vote cannot be edited.

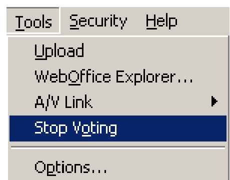
To stop the Voting session:

You can stop an ongoing voting session using one of the following options:

- In the *Voting* pane of the Meeting Manager window, click the **Stop** button.
- In the Meeting Manager toolbar, click the **Stop Voting** icon.

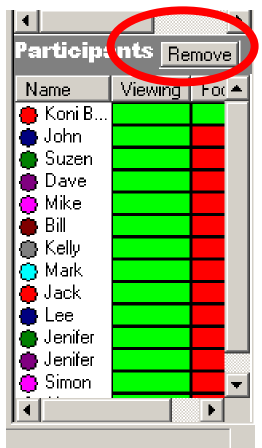


- On the *Tools* menu, click **Stop Voting**.



Removing a Participant from the Meeting

Remove Participant allows the owner to remove individual participants from a meeting while the meeting is in progress. To remove a participant from the meeting, the owner selects the appropriate participant and clicks on the **Remove** button as indicated in the figure below. The owner may also remove a participant by right clicking on the participant's name and selecting **Remove Participant** from the menu.



Saving a Meeting

Use the **Save Meeting** option to keep a record of your meetings. Saved meetings include all the documents that were viewed, along with participants' markings and comments. If you need to interrupt a meeting, you can save it, and resume later from wherever you left off.

1. Click the **Save** button, or select **Save Meeting** from the *File* menu.
2. Type a name and a description for the meeting and click **Save**. The meeting is saved to your Web*Office*.

   Saved meetings are kept in the *Saved Meetings* folder

Opening a Saved Meeting

Select **File** > **Open**, or click the **Open** button.

The *Open* dialog box appears. Navigate to the *Saved Meetings* folder under Web*Office*, and select the desired meeting.

You can also open the meeting directly from Windows Explorer. By default, the Web*Office* Meeting Manager stores saved meetings in the server under My *Office*s.

> Note
> Opening a saved meeting replaces the current meeting in the Web*Office* Meeting Manager.
> When an interrupted meeting is resumed, guests' tool colors may differ from those in the saved meeting.

Utilities and Technical Requirements 6

To enable immediate communication between subscribers, as well as between subscribers to their non-subscriber guests, Web*Office* features an open web IM, which is coupled with a mechanism that detects the presence of a guest on the system.

To achieve this functionality efficiently, Polycom requires subscribers and non-subscribers to be maintain their web browsers with the default browser security settings (*medium security* - in the case of Internet Explorer). In addition, users must have certain rights over their own desktop, enabling them to install software and printer drivers. In the event that the user cannot change his security settings, it may be possible to still use the downloadable client.

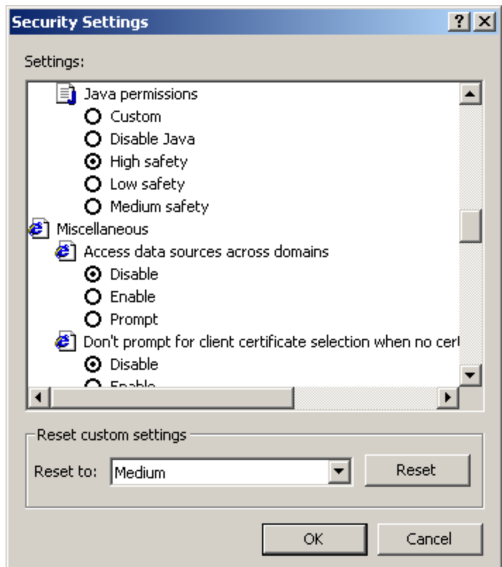
Web*Office* communicates over HTTP using the standard port. Web*Office* communication is compatible with firewall, NAT and proxy systems. In most cases, if a user is able to browse an external Web site they will be able to utilize Web*Office*. In the event that company network security policies restrict certain browser features such as Signed-ActiveX (IE), Signed-Plug-in (Netscape), JavaScript, High-Safety Java and cookies, Web*Office* will be able to operate without the full functionality related to web registration, automatic software installation, guest presence detection and Instant Messaging.

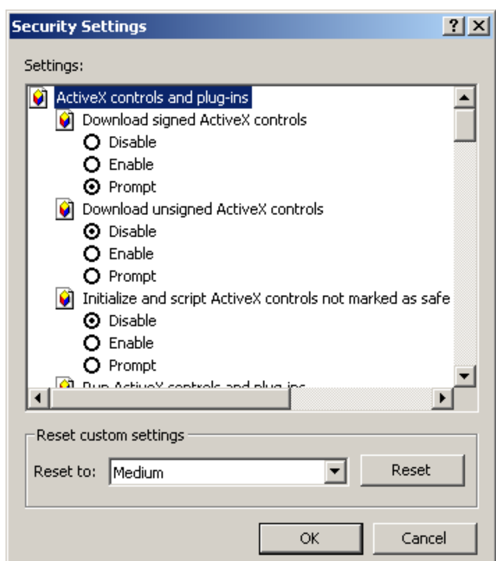
Below is a list of Web*Office* web browser-activated features, and their required security settings (special settings only):

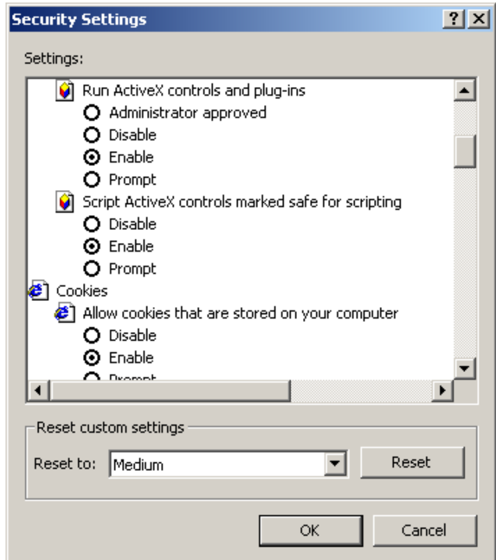
Web*Office* Feature	**Required Security Setting**
General Web Operation	File Download, Java-Script, Per-Session Cookies
Automatic client software download	Signed-ActiveX (IE) Download & Run, Signed Plug-in (NS) Download & Run
Automatic client software upgrade	Signed-ActiveX (IE) Run, Signed Plug-in (NS) Run
Subscriber Web Login	Stored Cookies for name recognition, Signed-ActiveX (IE) Run, Signed Plug-in (NS) Run
Guest Join a Meeting	Stored Cookies for name recognition,
Guest Presence Detection	Java-Script, Per-Session Cookies, Java applets
Subscriber buddy presence detection/awareness	Requires no special security setting as it runs from the Web*Office* Office Monitor (MOM) application
Instant Messaging	Java Applets, Stored Cookies

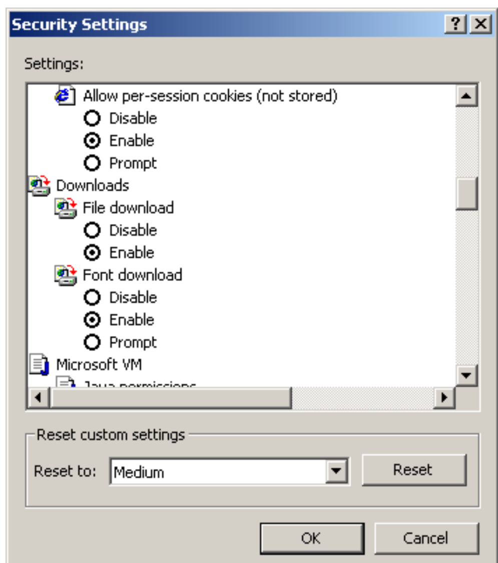
Internet Explorer *Medium Security* Default Settings

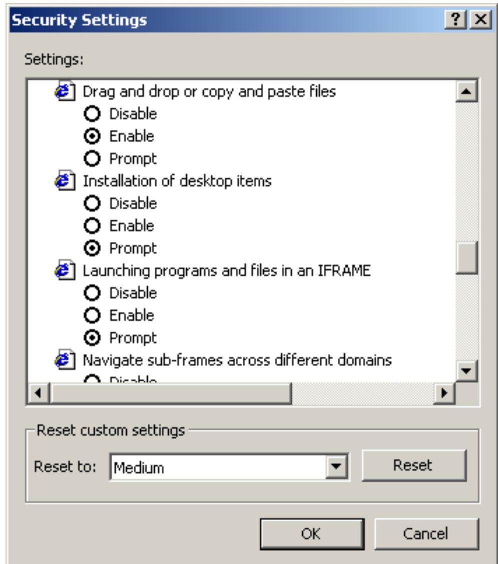
Below are figures depicting the Internet Explorer *Security Settings* options. The *Security Setting* window has many options that can be scrolled through. For this manual, they are presented one at a time to illustrate the exact configuration that will aid Web*Office* in operating efficiently.

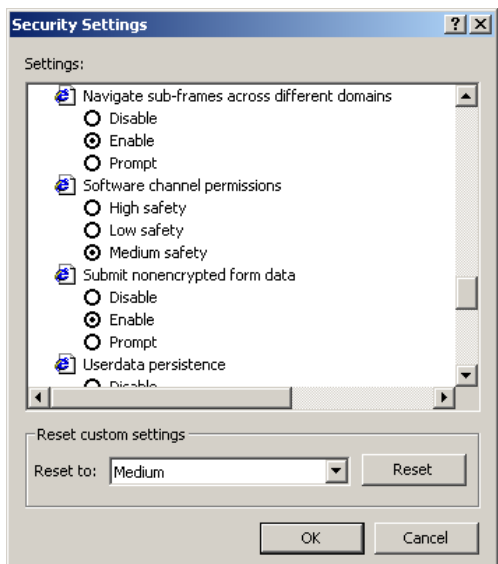


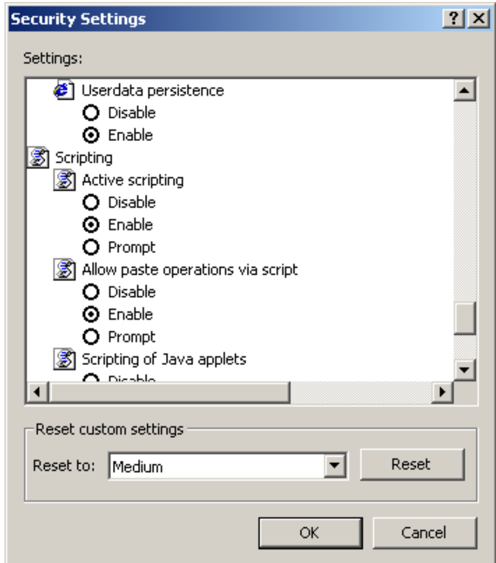


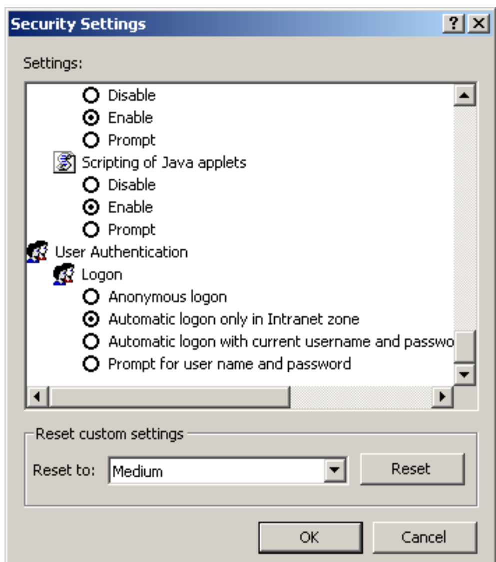

Security Settings
Settings:
Run ActiveX controls and plug-ins
Administrator approved
Disable
Enable
Prompt
Script ActiveX controls marked safe for scripting
Disable
Enable
Prompt
Cookies
Allow cookies that are stored on your computer
Disable
Enable
Reset custom settings
Reset to:
Medium
Reset
OK
Cancel


Security Settings
Settings:
Allow per-session cookies (not stored)
Disable
Enable
Prompt
Downloads
File download
Disable
Enable
Font download
Disable
Enable
Prompt
Microsoft VM
Reset custom settings
Reset to:
Medium
Reset
OK
Cancel


Security Settings
Settings:
Drag and drop or copy and paste files
Disable
Enable
Prompt
Installation of desktop items
Disable
Enable
Prompt
Launching programs and files in an IFRAME
Disable
Enable
Prompt
Navigate sub-frames across different domains
Reset custom settings
Reset to:
Medium
Reset
OK
Cancel

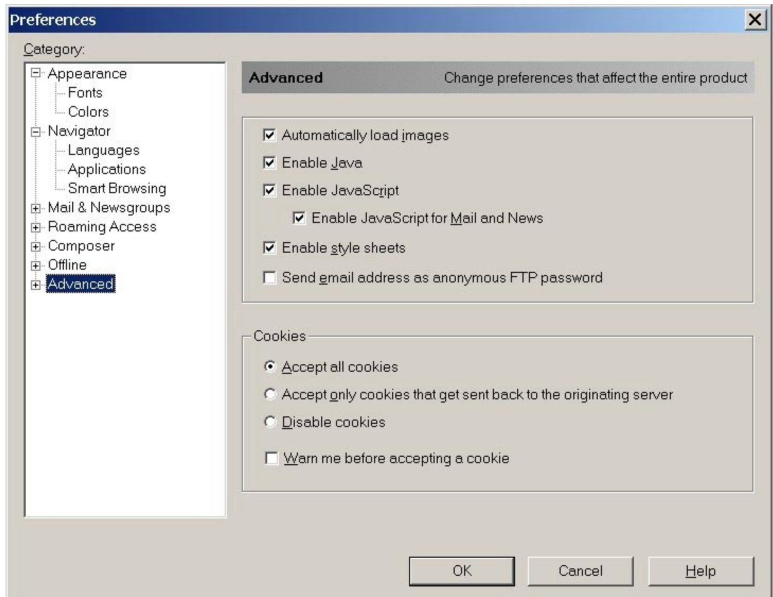

Security Settings
Settings:
Navigate sub-frames across different domains
Disable
Enable
Prompt
Software channel permissions
High safety
Low safety
Medium safety
Submit nonencrypted form data
Disable
Enable
Prompt
Userdata persistence
Reset custom settings
Reset to:
Medium
Reset
OK
Cancel


Security Settings
Settings:
Userdata persistence
Disable
Enable
Scripting
Active scripting
Disable
Enable
Prompt
Allow paste operations via script
Disable
Enable
Prompt
Scripting of Java applets
Reset custom settings
Reset to:
Medium
Reset
OK
Cancel


Security Settings
Settings:
Disable
Enable
Prompt
Scripting of Java applets
Disable
Enable
Prompt
User Authentication
Logon
Anonymous logon
Automatic logon only in Intranet zone
Automatic logon with current username and passwo
Prompt for user name and password
Reset custom settings
Reset to:
Medium
Reset
OK
Cancel

Netscape Default Security Settings

The following screen displays the default Netscape security settings:



Using the Log Generator

The Log Generator records your recent activities in a file. The system log files are made available for use by the Technical Support team in the event of a system error.

To retrieve the system log file:

1. Download the Log Generator from http://www.company.com/solutions/utilities.html
2. Download the Log Generator from http://www.company.com/solutions/utilities.html
3. Double click the file Web*Office*log.exe to start the Log Generator. The Problem Context Packager window will appear
4. Type the problem description and select a destination folder for the log file, named Web*Office*.pcp
5. Click **OK**. The Log Generator will automatically update the log every time you run the Web*Office* Manager
6. After running the Web*Office* Manager, email the log file (Web*Office*.pcp) to the Technical Support team address

Note:
The Log Generator records data only from your most recent session.