AVAYA

Using IP Office Web Collaboration Agent

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Contents

Chapter 1: Introduction

Purpose

This document describes how to use product features and capabilities.

Intended audience

This document is intended for people who want to learn how to use product features and capabilities.

Related Resources

Documentation

Download the following related documents at http://support.avaya.com.

Related links

Using on page 8

Using

Document Number	Title	Use this document to:	Audience
	Using IP Office Web Collaboration Agent.	Manage and participate in conferences using Collaboration Agent	Customers

Related links

Documentation on page 8

Support

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Chapter 2: Overview

Collaboration Agent

Collaboration Agent is an application that provides web collaboration and conferencing tools. Users with IP Office accounts and invited guests can use the tools to manage conferences and participate and collaborate in conferences. Conference participants can join conferences by logging in to Collaboration Agent and dialing in to the audio bridge assigned to the conference.

Participants can use the Collaboration Agent tools to boost productivity and track action items even after the conference ends. Conference moderators can:

- Record and edit meeting minutes.
- Create and distribute meeting reports based on the meeting minutes.

Collaboration Agent features

In Collaboration Agent, the participants and moderators can perform multiple tasks such as:

- View a list of other participants.
- Virtually raise a hand and seek permission to speak.
- Send messages.
- Annotate shared content.
- Record or edit minutes.
- Set the entry and exit tones.
- Dial out to other users and the users to the conference.
- Disconnect participants.
- Promote participants to the moderator role.
- Invite more participants to join an active conference.

During the conference, participants can view the following information in Collaboration Agent:

- The participants who joined only on the audio bridge
- The participants active on web collaboration
- The participant currently speaking
- The current presenter

Collaboration Agent user types

Within the Collaboration Agent environment, there are two types of users. These types are:

- Member
- Guest

During a conference, the user type is constant. It does not change.

Members require a password and an account on IP Office. Members have access to a large number of privileges within the Collaboration Agent environment.

Guests do not require a password and do not have an account on IP Office. If a guest wishes to become a member, an administrator must create a conferencing profile for them in IP Office Manager. Guests have fewer privileges than members. For example, guests can log in to a conference, raise their hands, send messages, enter minutes, associate their audio line, and be promoted to a presenter. However, they cannot be promoted to a moderator. Guests can also mute themselves if their Collaboration Agent log-in is associated with their phone in the participant list.

A guest must know the collaboration code to join the Collaboration Agent. Participants, including guests, who receive the Microsoft Outlook meeting invitation can also join the conference through Collaboration Agent by clicking the conference link in the invitation, which automatically opens Collaboration Agent.

Main window components field descriptions

No.	Name	Description
1	**Web Collaboration** 🖥	Starts web collaboration. Participants can share information, such as the desktop, an application, or a virtual whiteboard. All participants logged in to Collaboration Agent can view the shared information.
2	**Conference Information** 🛈	Opens the Conference Information window with the following options: • **Dial-in and invite details** • **Participation Reports** • **Documentation and help** • **Reports** • **Send logs**
3	**Exit.** 🔴	Exits Collaboration Agent.

Table continues…

No.	Name	Description
		If you exit Collaboration Agent, you can still stay connected to the conference on the audio bridge.
4	**Add Audio** 🔘	Adds audio to the web collaboration session on Collaboration Agent.
5	**Adjust audio volume** 🔊	Adjusts the volume of the audio on Collaboration Agent, or mutes the audio.
		Collaboration Agent displays Adjust audio volume button only if you use the integrated audio feature.
6	**Mute myself** 🔲	Mutes and enables your audio.
7	**Participants**	Sorts the list of participants to display:
		• All Participants
		• Participants In Collaboration
		• Recent Talkers
		• Dropped participants
		Collaboration Agent updates **Recent Talkers** when other participants speak. Collaboration Agent displays **Active speaker** next to the names of the participants who speak.
8	**Filter by participant name** 🔍	Filters and searches for conference participants by name.
9	**Sort Participants By Roles** 📶	Sorts and displays the participants in the participants list according to their roles, such as moderator, participant, and presenter.
10	**Add Participants** 👤	Opens the Add Participants window to add participants to the conference.
		When you enter the phone number of a participant to add to the conference, Web Collaboration calls the participant and connects the participant to the conference.
11	**Conference Controls** 🔲	Opens the Conference Controls window to enable and disable the following settings for the conference:
		• **Lock**
		• **End Conference**
12	**Participant Controls** ▾	Displays the following moderator and participant actions:
		• **Identify my phone**
		• **Mute**
		• **Presenter**

Table continues…

No.	Name	Description
		• **Moderator** • **Raise Hand** • **Drop from call**
13	Participants list	Displays the list of participants. In Event conferences, the participants list displays only the moderator, presenters, the participants whose audio is enabled, and the participants with raised hands. With the name or the phone number of participants, the participants list also displays icons next to each participant indicating: • The status of the audio of the participant. If the conference is secure, the audio icon contains an embedded lock icon. • That the participant virtually raised a hand. • That web collaboration of the participant is in progress.

Collaboration Agent icons

Button	Description
	The participant is an active speaker
	The participant is a presenter.
	The participant is the conference owner.

Related links

Audio in Collaboration Agent

Collaboration Agent supports streaming audio conferences using speakers, and microphone of the computer. If you use the integrated audio feature, you do not have to associate and dissociate your phone number with your account on Collaboration Agent. You can use the integrated audio feature through the **Call me** and **Connect** features. The system administrator must enable this feature for users. Use the integrated audio feature of Collaboration Agent instead of separately dialing in to the audio bridge. Speak through your computer microphone and hear other participants through speakers. Mute and enable audio using the Collaboration Agent interface.

> ⊛ **Note:**
>
> The **Call me** and **Connect** features are available only to system users and not to guest users.

Related links

[Main window components field descriptions](#) on page 11

Conference check list

The moderator, or person organizing a conference call, should complete the following tasks in advance.

#	Task
1	Create an email list of all individuals who should be invited to participate in the conference. ➕ **Tip:** To get the URL to the conference in Collaboration Agent. Click Information to open the Information panel and click **Call information**. You can open the panel if you are not logged into a conference. ➕ **Tip:** You can copy the phone number, URL, and participant code to an Email or other application to save typing them. You cannot copy the host code to prevent accidental publishing of the information. You can click the clipboard (📋) icon to copy the conference information to clipboard.
2	Send an email invitation that includes: • Either name or purpose or both of the conference call • Date and time • Instructions for logging in to Collaboration Agent • Instructions for dialing in to the conference bridge number • Instructions for entering the participant code • Instructions for sending messages and annotating shared files and whiteboard • Reminders to presenters to load documents for sharing in the Library ⊛ **Note:** You can also do these actions by using the **Conference Scheduling** gadget in one-X portal and the **Schedule Conference** feature in Avaya Outlook plug-in. For more information, see *one-X Portal for IP Office: User Guide one-X Portal for Avaya Office: User Guide*. You can download this document from http://support.avaya.com/
3	Load documents for sharing in the Library.

Viewing the Collaboration Agent version

You can view the current version of Collaboration Agent at any time.

About this task

The purpose of this task is to view the version information of the Collaboration Agent application that you are currently using.

Procedure

1. Log in to Collaboration Agent and access a conference.

   You can access your own conference or enter the code(s) required to access another conference.

2. On the Web Collaboration pane, right click the mouse button to display an information menu.

   The version information is displayed at the top of the information menu.

Accessing online help

If you have difficulties accomplishing any task in Collaboration Agent, you can access helpful instructions at any time.

About this task

The purpose of this task is to view helpful information related to the Collaboration Agent application.

Procedure

1. Log in to Collaboration Agent and access a conference.

   You can access your own conference or enter the code(s) required to access another conference.

2. In the Collaboration Agent window, click **Information**.

3. On the Information Panel, click **Documentation and Help**.

   Collaboration Agent opens a new dialog which contains a comprehensive guide to the common tasks and important concepts within Collaboration Agent.

Chapter 3: Logging in to and out of collaboration agent

Plug-in requirements

- Adobe Flash version 11.2.0 or later
- Audio conferencing plug-in
- Web collaboration plug-in

Supported web browsers and operating systems

Web browser	Operating system
Microsoft Edge	Windows 10
Internet Explorer 10 and 11	Windows 7
	Windows 8
	Windows 10
Mozilla Firefox version 10 and later	Windows 7
	Windows 8
	Windows 10
Google Chrome version 17 and later	Windows 7
	Windows 8
	Windows 10
Safari 8 and 9 for Macintosh computers	OS X 10.0, 10.0, 10.11

Limitations

For document sharing to work properly, your administrator must install a trusted root certificate on the web collaboration server. The trusted root certificate must be signed by a certified authority.

Logging into collaboration agent

You can log in to Collaboration Agent as a conference owner or as a guest.

> 📌 **Note:**
>
> Before you log in, you must install the Avaya Web Collaboration Agent application on your browser.

Logging in to Collaboration Agent as the conference owner

Before you begin

Get the collaboration agent address from your system administrator.

Procedure

1. Using your web browser, go to the Collaboration Agent address provided by your system administrator.

2. In the IP Office Web Collaboration window, select **Login as conference owner**.

3. In the **Username** box, type your user name.

   > 📌 **Note:**

4. In the **Password** box, type your password.

   > 📌 **Note:**
   >
   > The password must be the same as the telephony password defined in IP Office Manager .

5. To retain your login settings, check **Remember me**.

6. Click **Login**.

   The system opens the IP Office Web Collaboration application.

7. In the IP Office Web Collaboration application screen, perform one of the following:

   • To join the conference as a member, in the Join Conference tab, type the conference number.

   • To start the conference as a conference owner, in the My Conference tab, click **Start My Conference**.

Logging in to Collaboration Agent as a guest

About this task

You can log in to multiple conferences using different web browsers.

If you use Microsoft Surface Pro, you can improve your Collaboration Agent experience by reducing the Windows Explorer default zoom setting to 125% or less.

Procedure

1. In your web browser, go to the Collaboration Agent URL.

   For example, `https://IP address or server name:9443/meeting`

2. In Collaboration Agent, enter your name and the collaboration code.

   • The name must be from 2 to 31 characters long. Collaboration Agent displays the name in the participants list.

   • If the Collaboration Agent address contains the collaboration code, Collaboration Agent automatically populates the code.

3. **(Optional)** Click **Download the Sharing and Collaboration Plugin** to install the plug-in for sharing content.

4. Click **Login**.

   • If the conference requires passcodes for security, Collaboration Agent displays the This conference requires a PIN window.

   • If the Collaboration Agent address contains a PIN, Collaboration Agent automatically populates the PIN and does not display the This conference requires a PIN window.

5. **(Optional)** Enter the passcode, and click **Login**.

Logging out of Collaboration Agent

Procedure

1. Click **Exit** in the upper-right corner.

   Collaboration Agent displays a confirmation.

2. Click **Yes**.

   • Collaboration Agent ends the conference.

   • Depending on whether you logged in as a guest or a member, Collaboration Agent displays the Join a conference as a guest or the Member login window. To log in to another Collaboration Agent conference, keep this window open.

3. Click **Logout**.

Chapter 4: Accessing IP Office Web Collaboration

Accessing Web Collaboration

You can access Web Collaboration as a conference owner or a participant from one of the following Avaya endpoints:

- Avaya one-X® Portal for IP Office
- Avaya IP Office Outlook Plug-in
- Avaya Communicator for Windows
- Avaya Communicator for iOS

The integration of web collaboration with Avaya communication end points ensure ease of communication. By clicking the web collaboration icon you can directly start a collaboration session without the need to enter the user name and password again.

Accessing Web Collaboration through One X user portal

Before you begin

Your administrator must enable Web Collaboration for you.

Procedure

In the Avaya one-X® Portal for IP Office window:

- To start a Web Collaboration session as the conference owner, at the top of the Avaya one-X® Portal for IP Office window, click the Web Collaboration icon.

- To join the Web Collaboration session of a contact as a participant, in the Directory area, click the Web Collaboration icon next to the contact name.

The Web Collaboration session starts in a separate window.

Accessing Web Collaboration through Avaya Office Plug-in

Before you begin

Your administrator must enable Web Collaboration for you.

About this task

Use this task to start your Web Collaboration session as the conference owner. You can also join Web Collaboration session of other users as a participant.

Procedure

In the **Avaya IP Office Plug-in** window:

- To start Web Collaboration session as the conference owner, at the top of the **Avaya IP Office Plug-in** window, click the Web Collaboration icon.
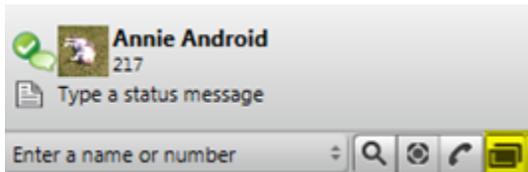
- To join the Web Collaboration session of a contact as a participant, click **Join Web Conference** next to the contact name.
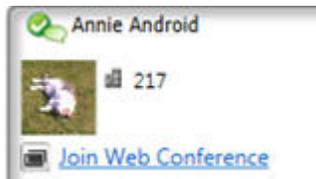
The Web Collaboration session starts in a separate window.

Accessing Web Collaboration through Avaya Communicator for Windows

Before you begin

- Your administrator must enable Web Collaboration for you.
- To view the Web Collaboration icon, you should first dial into the meet-me conference using the meet-me short code. The default shortcode is *66*NNNN#, where NNNN is the extension number of the moderator.

Procedure

In the Avaya Communicator window:

- To start a web collaboration session as the conference owner, click the Web Collaboration icon.
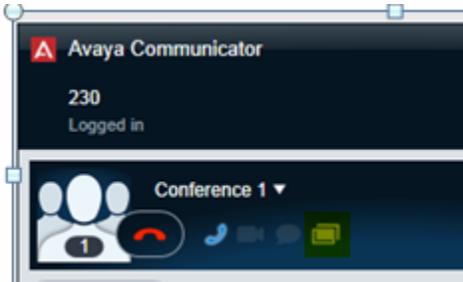
- To join web collaboration session as a participant, click the Collaboration is available pop-up window.

> ✳ **Note:**
>
> The Collaboration is available pop-up window is displayed only when the conference owner starts a web collaboration session.

The Web Collaboration session starts in a separate window.

Accessing Web Collaboration through Avaya Communicator for iOS

Before you begin

- Your administrator must enable Web Collaboration for you.
- To view the Web Collaboration icon, you should first dial into the meet-me conference using the meet-me short code. The default shortcode is *66*NNNN#, where NNNN is the extension number of the moderator.

Procedure

To start Web Collaboration session as the conference owner or a participant, in the Avaya Communicator window, click the Web Collaboration icon.

The Web Collaboration session starts in a separate window.

Chapter 5: Managing your participation

Raising and lowering your hand

Procedure

1. To raise your hand, do one of the following:
   - Right-click your Collaboration Agent entry in the participant list.
   - Select your Collaboration Agent entry in the participant list and click ▼.
2. Click ▢.

   The system displays the ▢ icon next to your name in the Participants list.
3. To lower your hand, do one of the following:
   - Right-click your Collaboration Agent entry in the participant list.
   - Select your Collaboration Agent entry in the participant list and click ▼.
4. Click ▢.

   The system does not display the ▢ icon.

Muting and enabling your audio

About this task

You can only mute and enable your own audio. In Event conferences, you can mute and enable your audio only after the moderator enables your audio for the first time.

If you are an audio-only participant, use the dial pad commands.

Before you begin

Associate your phone number with your Collaboration Agent account.

Procedure

1. In the participants list, select your name.
2. Click **Participant Controls** ▼.
3. Click **Mute** 🎤.

You can also:

- Right-click your name in the participants list, and click **Mute** ✎ .
- Click **Mute myself** 🔊 in the upper-right corner.

4. Click **Mute** ✎ again to enable your audio.

Capturing the attendance snapshot

About this task

Use this procedure to capture the list of participants in the conference. Collaboration Agent displays the list in a dialog box. The attendance list contains names of the participants and the entry and exit times. You can:

- Print the attendance list.
- Copy the text on a clipboard.
- Copy and paste the attendance list in Microsoft Excel, which preserves the format.

➕ **Tip:**

The attendance snapshot captures only a specific moment in the conference. Use the recording feature to get a true representation of the attendance for the full duration of the conference.

Before you begin

Enable pop-ups in your web browser.

Procedure

1. Click **Conference Information** ℹ.
2. Click **Participation Reports**.

Searching for participants

About this task

The participants list displays only a limited number of participants. The search feature searches the entire list.

Procedure

1. Click **Filter By Participant Name** 🔍.

   Collaboration Agent expands the button to type the name of a participant.

2. Enter the name of the participant.

   For example, if you want to find the moderator, enter `moderator`.

3. To cancel the search and view all participants in the Collaboration Agent list, click **X** in **Filter By Participant Name** 🔍.

Disconnecting from conferences

Procedure

1. In the participants list, select your name.

2. Click **Participant Controls** 🔽.

3. Click **Drop from Call** ⊗.

   You can also right-click your name in the participants list, and click **Drop from Call** ⊗.

Result

IP Office disconnects all phones associated with your Collaboration Agent login. To stay connected on Collaboration Agent, disconnect only your phone.

Chapter 6: Managing a conference

Adding participants to conferences

About this task

Dial out to the phones of users from Collaboration Agent and connect the users to the audio bridge.

When you dial out from Collaboration Agent, you can call a phone by entering the PSTN number. You also do not need to enter the conference access code to join conferences.

Procedure

1. Click **Add Participants** ⊕.

   Collaboration Agent displays the Add Participants window.

2. Enter the phone number of the participant.

3. Click **Add to Call** ⊕ Add to Call .

Muting and enabling the audio of participants

About this task

Mute and enable the audio of all participants or specific participants.

Muted participants can enable their own audio. In Event conferences, all participants are muted and cannot enable their audio. After the moderator enables the audio of the participants in Event conferences for the first time, the participants can mute and enable their audio.

Only moderators can perform this task.

Procedure

1. In the participants list, select the name of the participant.

2. Click **Participant Controls** ▾.

3. Click **Mute** ⊗.

   You can also right-click the name of the participant in the participants list, and click **Mute** ⊗.

4. Click **Mute** ⊗ again to enable the audio of the participant.

Promoting participants to the presenter role

About this task

Promote participants to the presenter role, so that the promoted participants can share documents, applications, or a virtual whiteboard. By default, only the moderator can present content to the participants in a conference.

Procedure

1. In the participants list, select the name of the participant.

2. Click **Participant Controls** ▾ .

3. Click **Presenter** 🔁 .

   You can also right-click the name of the participant in the participants list, and click **Presenter** 🔁 .

Promoting a participant to moderator

About this task

Using this procedure, you can promote another participant to moderator during a conference.

🛑 **Important:**

This promotion takes place immediately after you click **OK** in the confirmation dialog box.

✳️ **Note:**

A guest cannot be promoted to a moderator.

Procedure

1. Right-click the Collaboration Agent entry of the participant in the participant list.

2. Click **Moderator**.

3. In the confirmation dialog box, click **Yes** to promote the participant to moderator.

   The participant is promoted to a moderator.

Resuming the moderator role

About this task

Using this procedure, you can resume the moderator role during a conference.

Procedure

1. Right-click your Collaboration Agent entry in the participant list.

2. Click ▬ and select **Assume Moderator**.

   You resume the moderator role.

Disconnecting participants

Procedure

1. In the participants list, select the name of the participant.

2. Click **Participant Controls** ▾.

3. Click **Drop from Call** ⊗.

   You can also right-click the name of the participant in the participants list, and click **Drop from Call** ⊗.

Result

IP Office disconnects all phones associated with the selected participant from the conference. If the phone and the Collaboration Agent account are associated, IP Office disconnects both the phone and Collaboration Agent.

Lowering raised hands of participants

About this task

Only moderators can perform this task.

Procedure

1. In the participants list, select the name of the participant.

2. Click **Participant Controls** ▾.

3. Click **Raise Hand** ↓.

   You can also right-click the name of the participant in the participants list, and click **Raise Hand** ↓.

Locking and unlocking conferences

About this task

You can lock the conference to prevent more participants from joining the audio conference or the Collaboration Agent conference. If some participants join the audio conference, but do not log in to the Collaboration Agent conference, these participants cannot join the web conference later in the locked conference.

Only moderators can lock and unlock conferences.

Procedure

1. Click **Conference Controls** ⬚.

2. Click **Lock** ⬚.

   You can also press `*7` on the phone dial pad.

   Collaboration Agent locks the conference to prevent more participants from joining the conference.

3. Click **Lock** ⬚ again to unlock the conference.

Chapter 7: Sharing information

Web collaboration

With web collaboration, the conference moderator or a selected participant can share:

- The entire desktop or a part of the desktop.
- Specific applications.
- Documents.
- Virtual whiteboards.

Web Collaboration components

No.	Tools	Description
1	Annotation tools	Annotate the whiteboard or shared document.
2	Zoom tools	Changes the size of the screen content.
3	Autofit	Fits the Web Collaboration interface to the window size.

Table continues…

No.	Tools	Description
4	Screenshot	Sends a shot of the current screen to all participants as a JPG file that participants can download.
5	Navigation tools	Navigate the shared content. The buttons change according to the content being shared.
6	Stop Sharing	Stop sharing current content.
7	Hide or show roster	Hides or shows the conference roster.

Managing your library

Library

IP Office provides a library for users with accounts to upload documents, presentations, and images to share in web collaboration sessions. Participants can collaborate by viewing these documents and making notes on shared whiteboards. In the library, you can:

- Upload documents.
- View documents.
- Rename documents.
- Sort documents according to your preference.
- Delete the uploaded documents.

Sharing content from the library has the following advantages. Presenters can share content from the library:

- From anywhere by logging in to Collaboration Agent and gaining access to the library.
- For more responsive and higher resolution sessions.
- To enable participants to browse the shared content independently in a separate pop-up window.

Supported document formats

Tab	Document type	Extension
Plain text	• .txt	
Documents	Adobe Acrobat	• .pdf

Table continues…

Tab	Document type	Extension
Pictures	JPEG	• .jpg
		• .jpeg
	PNG	• .png

Uploading documents to the library

About this task

The library supports maximum 50 documents. You can upload documents that:

- Are not encrypted with a password.
- Contain less than 300 pages.
- Have a maximum size of 30 MB.

Only moderators and presenters can upload documents to the library.

Before you begin

Close the documents to upload.

Procedure

1. On the My Conference window, click **Library**.

   If you are in an active web conference, you can also click **My Library** at the bottom of the window.

2. Click **Upload**, and select the document to upload.

Viewing documents in the library

Viewing documents in the library as thumbnails

Procedure

1. On the My Conference window, click **Library**.

   If you are in an active web conference, you can also click **My Library** at the bottom of the window.

2. Click **Thumbnail view** .

Viewing documents as a list

Procedure

1. On the My Conference window, click **Library**.

   If you are in an active web conference, you can also click **My Library** at the bottom of the window.

    2. Click **List view** ▤.

Renaming documents in the library

Before you begin

Log in to Collaboration Agent.

Procedure

1. On the My Conference window, click **Library**.

   If you are in an active web conference, you can also click **My Library** at the bottom of the window.

2. Select a document.

3. Click **Rename**.

4. Type the new name in the dialog box.

5. Click **Save**.

Deleting documents in the library

Before you begin

Log in to Collaboration Agent.

Procedure

1. On the My Conference window, click **Library**.

   If you are in an active web conference, you can also click **My Library** at the bottom of the window.

2. Select a document.

3. Click **Delete**.

   Collaboration Agent asks for a confirmation.

4. Click **OK**.

Sorting documents in the library

Procedure

1. On the My Conference window, click **Library**.

   If you are in an active web conference, you can also click **My Library** at the bottom of the window.

2. Click one of the following options:

- **Presentations**

- **Documents**

- **Pictures**

   Collaboration Agent displays the type of documents that you select.

3. Click your choice again to reverse the filter.

Installing the web collaboration plug-in

About this task

Collaboration Agent requires a Java applet to share content. The web browser might block Collaboration Agent from starting the Java applet to share content because of modifications to web browsers by developers to resolve security vulnerabilities. Install the web collaboration plug-in so that Collaboration Agent does not require the Java applet to share content.

If you disable the plug-in, Collaboration Agent prompts you to download the plug-in again when you share content the next time. If you install the plug-in again, the operating system of your computer might display the following message:

```
This program might not have installed correctly.
```

The web collaboration plug-in supports only 32–bit web browsers. You must restart the web browser after you install the plug-in.

Procedure

1. On the Join a conference as a guest or Member login page, click **Download the Sharing and Collaboration Plugin**.

   Collaboration Agent displays **Download the Sharing and Collaboration Plugin** only if the web collaboration plug-in is not installed or if the plug-in is disabled.

   Collaboration Agent displays a prompt to save the file.

2. Save the plug-in installation file.

   The operating system firewall might display a warning when you download the plug-in. Click the appropriate option for the firewall to allow access to the plug-in.

3. Run the installation file, and follow the instructions in the **IP Office Web Collaboration** wizard.

Next steps

Restart the web browser.

Document sharing

Sharing documents from the library

About this task

If you disconnect from the conference without ending the document sharing, the sharing on the conference continues.

Before you begin

Web collaboration must be active on Collaboration Agent.

Upload the documents to the library.

Procedure

1. Click **Collaboration** ▣.
2. Click **Sharing**.
3. Click **Document from library**.
4. On the My Library window, select one of the following document types:
   - **Presentations**
   - **Documents**
   - **Pictures**
5. Select a document.
6. Click **Share**.

Browsing shared content independently

About this task

Browse a shared document independently of the moderator or presenter.

Before you begin

The moderator or the presenter must be sharing content in the web collaboration session.

Procedure

Click **Browse shared content in private pop-up window** ▣.

Ending document sharing

Procedure

Click **Stop Sharing**.

Shared document buttons

Button	Name	Description
	Auto fit	Automatically fits the shared content to the window size.
	Zoom out	Decreases the zoom setting of the shared document.
	Zoom in	Increases the zoom setting of the shared document.
	Magnification slider	Changes the zoom setting of the shared document. This slider operates independently of **Auto fit**.
	First page	Goes to the first page of the shared document.
	Previous page	Goes to the previous page of the shared document.
	Next page	Goes to the next page of the shared document.
	Last page	Go to the last page of the shared document.
	Browse shared content in private pop-up window	Opens the shared document in a separate window to browse the document independently of the presenter.
	Page gallery	Opens a thumbnail gallery of the document pages for easy navigation. Clicking a thumbnail opens the page.
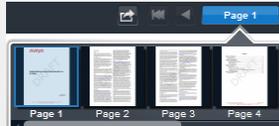
Related links

[Shared content annotation tools](#) on page 40

Virtual whiteboard sharing

Sharing virtual whiteboards

About this task

Share text or drawings with other participants on a virtual whiteboard. Use the annotation tools to create, delete, and annotate the whiteboard. When the moderator or presenter displays a whiteboard, other participants also can annotate the whiteboard.

> ⊕ **Tip:**
>
> When you pause the mouse pointer over an annotation, Collaboration Agent displays a pop-up window that shows the name of the participant who added the annotation.

Procedure

1. Click **Collaboration** ▣.
2. Click **Sharing**.
3. Select **Whiteboard**.

Adding virtual whiteboards

Before you begin

Share a virtual whiteboard.

Procedure

Click **Add whiteboard** + .

Deleting virtual whiteboards

Before you begin

Share multiple whiteboards.

Procedure

1. Click **Delete whiteboard** 🗑 .

   Collaboration Agent displays a confirmation message.
2. Click **OK**.

Ending whiteboard sharing

Procedure

Click **Stop Sharing**.

Virtual whiteboard buttons

Button	Name	Description
◀	**Previous whiteboard**	Goes to the previous whiteboard.
▶	**Next whiteboard**	Goes to the next whiteboard.
Whiteboard 1	**Whiteboard number**	Displays the title of the current whiteboard.
< Whiteboard 1 > Whiteboard 1 ✓ Whiteboard 2 Whiteboard 3	**Whiteboard list**	Displays a list of the open whiteboards.
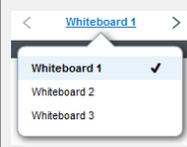
Sharing applications and the desktop

Sharing applications and the desktop

About this task

Use this procedure to share an application, the entire desktop, or a part of your desktop.

Collaboration Agent does not support sharing applications on computers running Apple OS X 10.

Before you begin

Enable pop-up windows in your browser .

Procedure

1. Click **Collaboration** ▣.

2. Click **Sharing**.

3. Select one of the following options:

   • **Entire screen**

   • **Portion of screen**: Collaboration Agent displays a box that you can move and resize to display only a specific part of the desktop.

- **Application window**: Collaboration Agent displays the Choose application window to select the application to share.

If you installed the Collaboration Agent plug-in, do not minimize the application window that you are sharing. Collaboration Agent stops the application sharing if you minimize the window.

Ending application and desktop sharing

Procedure

Click **Exit sharing** ❌.

You can also click **Stop sharing** [Stop sharing] on the top of Collaboration Agent.

Shared applications and desktop buttons

Button	Name	Description
	Change type of sharing	Changes the type of sharing. Share the entire desktop, a part of the desktop, or a specific application.
	Pen	Annotates the shared application or desktop.
	Choose pen color	Chooses the color of the pen.
	Show pointer	Points to a specific object on the desktop.
	Pause screen sharing	Pauses screen sharing.
	Resume screen sharing	Resumes screen sharing.

Granting remote control of the shared desktop

About this task

Use this procedure to grant remote control of the shared desktop or the shared application to conference participants. When you share the desktop or the application, Collaboration Agent displays **Grant control of shared desktop** [Grant Control] on the top of Collaboration Agent.

The participant who has remote control can use the keyboard and mouse to control the shared desktop or application. The participant can also use key combinations as shortcuts and paste text on your desktop. The participant cannot use the following keys:

- The `Ctrl+Alt+Delete` keyboard shortcut.
- The function keys.

Before you begin

Share your desktop or an application.

Procedure

1. Click **Grant control of shared desktop** `Grant Control`.

   Collaboration Agent displays the Grant control to window.

2. Select a participant, and click **Ok**.

Requesting remote control of the shared content

About this task

Use this procedure to request presenters to gain control of the shared content. When the presenter is sharing content, Collaboration Agent displays **Request control** `Request control` on the top of Collaboration Agent

Your remote control of the shared content ends if the presenter stops sharing the content. Collaboration Agent does not display a warning before stopping your remote control. Presenters can also stop your remote control of the shared desktop or application.

Before you begin

A presenter must be sharing content.

Procedure

Click **Request control** `Request control`.

Annotating content

Annotations in shared content

Web collaboration provides various dynamic tools for annotating shared content, applications, and drawings on virtual whiteboards. The availability of the dynamic tools depends on the type of content shared: applications, documents, or whiteboards. You can add text, lines, and stamps to the shared content.

Moderators and presenters can annotate all shared content, while participants can annotate only virtual whiteboards.

Shared content annotation tools

Button	Name	Description
	Selection tool	Selects an annotation.
		When the arrow changes to a finger cursor, you can move the annotation with the mouse.
	Pen tool	Draws a freehand line.
	Marker tool	Highlights text and graphics.
		You can use the color selection tool to choose the highlighting color.
	Line tool	Draws a straight line in the currently selected color.
		You can choose the line thickness in the flyout.
	Line tool flyout	Chooses the line thickness.
	Rectangle tool	Draws a filled rectangle or rectangular outline in the currently selected color.
		You can choose a filled rectangle or outline in the flyout. The button shows the rectangle type.
	Rectangle tool flyout	Chooses a filled rectangle or an outline.
	Circle tool	Draws a filled circle or circular outline in the currently selected color.
		You can choose a filled circle or an outline in the flyout. The button shows the circle type.
	Circle tool flyout	Chooses a filled circle or an outline.
	Stamp tool	Inserts a stamp in the currently selected color.
		Use this tool to call attention to items that you share. Use the color selection tool to choose the stamp color.
	Text tool	Selects the text size: small, medium, or large.
	Text tool flyout	Selects the text size: small, medium, or large.
	Color picker	Selects a color for annotation.
	Color picker flyout	Chooses the color in the flyout.
		The button displays the current color. You cannot edit the existing text. You must delete the text, and type new text.
	Delete selection	Deletes the selected annotation.
	Delete selection flyout	Deletes the selected annotation or delete all.

Table continues…

Button	Name	Description
	Screen shot	Sends a screen shot of the current screen as a JPG file in a message to all participants. Participants can download the file on to their computers.

Related links

[Shared document buttons](#) on page 35

Changing the type of content sharing

Before you begin

Share content in the web collaboration session.

Procedure

1. Click **Sharing** `⊲  Sharing  ▽`

   If you share your desktop or a document from the library, Collaboration Agent asks for a confirmation to stop sharing.

2. Click **Stop**.

3. Select a sharing type.

Result

Depending on your action, Collaboration Agent displays the options to share other content.

Chapter 8: Sending messages in conferences

Opening the Messages window

Procedure

1. Click **Collaboration** .

2. Click **Messages** .

Sending messages

Procedure

1. Click **Collaboration** .

2. Click **Messages** .

3. Select:

   • **All Participants** to send a public message.

   • The name of a participant to send a private message.

4. Type your message, and click **Send** .

Chapter 9: Managing meeting minutes

Adding meeting minutes

Procedure

1. Click **Collaboration** .

2. Click **Minutes** .

   Collaboration Agent displays the Meeting minutes window.

3. Enter the text, and select the meeting minutes item type.

4. **(Optional)** To hide the meeting minutes item from conference participants, select **Personal**.

   In meeting reports, Collaboration Agent includes personal meeting minutes items only from moderators.

   Collaboration Agent replaces **Add** with **Add Personal**.

5. Click **Add** or **Add Personal**.

Editing meeting minutes

Before you begin

You can edit only your own meeting minutes.

Procedure

1. Click **Collaboration** .

2. Click **Minutes** .

   Collaboration Agent displays the Meeting minutes window.

3. Select the meeting minutes item.

4. Click **Edit selected minutes** .

   Collaboration Agent displays the Edit window.

5. Edit the text and change the meeting minutes item type.

6. **(Optional)** To reveal the note to other conference participants, select **Make public**.

7. Click **Save**.

Deleting meeting minutes

Before you begin

You can delete only your own meeting minutes.

Procedure

1. Click **Collaboration** ▣.

2. Click **Minutes** 🔘 Minutes .

   Collaboration Agent displays the Meeting minutes window.

3. Select the meeting minutes item.

4. Click **Delete selected minutes** 🗑.

   Collaboration Agent displays a confirmation.

5. Click **Ok**.

Meeting minutes buttons

Button	Name	Description
✏	**Edit selected minutes**	Edits the selected meeting minutes item.
🗑	**Delete selected minutes**	Deletes the selected meeting minutes item.
View	—	Displays a specific type of meeting minutes.
All	—	Displays all types of meeting reports.
Note	—	Tags the record as a meeting note. **Note** is also a filter in **View**.
Keyword	—	Annotates the meeting with tags that you can search. **Keyword** is also a filter in **View**.
Action Item	—	Assigns work items to participants. **Action Item** is also a filter in **View**.
Question	—	Records questions as part of the meeting records. **Question** is also a filter in **View**.
Personal	—	Hides the note from other participants in the conference. **Personal** is also a filter in **View**.

Chapter 10: Managing meeting reports

Viewing meeting reports

About this task

Only conference owners can gain access to meeting reports.

Before you begin

Log in to Collaboration Agent.

Procedure

1. On the My Conference window, click **Reports**.

   In an active conference, you can view the meeting reports from **Reports** in **Conference Information** ℹ.

   Collaboration Agent displays the Meeting Reports window.

2. Select a meeting report.

3. Click **Open**.

Sorting meeting reports

About this task

Sort the meeting reports by date and time, name, and duration of conferences in ascending and descending order.

Only conference owners can gain access to meeting reports.

Before you begin

Log in to Collaboration Agent.

Procedure

1. On the My Conference window, click **Reports**.

   In an active conference, you can view the meeting reports from **Reports** in **Conference Information** ℹ.

   Collaboration Agent displays the Meeting Reports window.

2. Select a meeting report.

3. Click one of the following columns:

   - **Date and Time**
   - **Name**
   - **Duration**

   Collaboration Agent sorts the meeting reports by the column that you select.

4. Click the column again to revert the sorting order.

Deleting meeting reports

About this task

Only conference owners can gain access to meeting reports.

Before you begin

Log in to Collaboration Agent.

Procedure

1. On the My Conference window, click **Reports**.

   In an active conference, you can view the meeting reports from **Reports** in **Conference Information** ℹ️.

   Collaboration Agent displays the Meeting Reports window.

2. Select a meeting report.

3. Click **Delete**.

   Collaboration Agent displays a confirmation.

4. Click **Ok**.

Renaming meeting reports

About this task

Only conference owners can gain access to meeting reports.

Before you begin

Log in to Collaboration Agent.

Procedure

1. On the My Conference window, click **Reports**.

In an active conference, you can view the meeting reports from **Reports** in **Conference Information** [i].

Collaboration Agent displays the Meeting Reports window.

2. Select a meeting report.

3. Click **Rename**.

Collaboration Agent displays the Rename session window.

4. Type the new name of the meeting report.

5. Click **Save**.

Sending meeting reports

About this task

Only conference owners can gain access to meeting reports.

Before you begin

Log in to Collaboration Agent.

Procedure

1. On the My Conference window, click **Reports**.

In an active conference, you can view the meeting reports from **Reports** in **Conference Information** [i].

Collaboration Agent displays the Meeting Reports window.

2. Select a meeting report.

3. Click **Open**.

Collaboration Agent displays the My Meeting window.

4. **(Optional)** In the **Layout by** field, select one of the following options:

- **Time**
- **Author**
- **Type**

5. **(Optional)** In the **View** field, select the types of events to send in the meeting report:

- **All**
- **Action items** ✓
- **Keywords** [K]
- **Meeting events** ⌁
- **Messages in meeting reports** 💬

- **Note** ⬜

- **Questions** ⬚

You can select multiple options.

6. Click **Export**.

Collaboration Agent displays the Report preview window.

7. Do one of the following:

   - To copy the report to the clipboard as text, click **Copy**.

   - To print the report, click **Print**.

   - To save the report as an HTML file, click **Save**.

Sending Collaboration Agent plug-in logs

Procedure

1. Click ⬛ **Conference Information**.

   Collaboration Agent displays the Conference Information window.

2. Click **Send logs**.

   Collaboration Agent opens an email in Microsoft Outlook. The email contains the Collaboration Agent plug-in logs, which includes all conference events, and a list of questions.

3. Type your responses to the questions, and send the email.

Related links

[Installing the web collaboration plug-in](#) on page 33

Chapter 11: Installing Certificate

Installing certificates

If your administrator decides to use a customized trusted root certificate, you must install the certificate using your browser. Request your administrator to share the trusted root certificate with you.

Installing a trusted root certificate in Chrome

Before you begin

Get the trusted root certificate from your administrator.

Procedure

1. On Google Chrome, navigate to **Customize and control Google Chrome** > **Settings**.

2. On the Settings window, navigate to **Show advanced settings** > **Manage Certificates**.

3. In the Certificates dialog box, click **Trusted Root Certification Authorities**.

4. Click **Import**, and select the trusted root certificate that your administrator has shared with you.

Installing a trusted root certificate in Firefox

Before you begin

Get the trusted root certificate from your administrator.

Procedure

1. On Firefox, navigate to the menu and click **Options**.

2. In the Options dialog box, navigate to **Advanced** > **Certificates**.

3. In the Certificate Manager dialog box, click **Import** and select the trusted root certificate that your administrator has shared with you.

Installing a trusted root certificate in Internet Explorer

Before you begin

Get the trusted root certificate from your administrator.

Procedure

1. On Internet Explorer, navigate to **Tools** > **Internet Options**.

2. In the Internet Options dialog box, navigate to **Content** > **Certificates**.

3. In the Certificates dialog box, click **Trusted Root Certification Authorities**.

4. Click **Import**, and select the trusted root certificate that your administrator has shared with you.

Installing a trusted root certificate in an Apple system

Before you begin

Get the trusted root certificate from your administrator.

Procedure

1. To import the certificate, do one of the following:

   • Double-click **Certificate** on your Apple desktop.

   • Open the **Keychain Access** utility, and navigate to **File** > **Import items**.

2. Browse and select the trusted root certificate, and click **Open**.

3. To install the certificate, click **Always Trust**.

   The system displays a password dialog box.

4. Type your password, and click **Update Settings**.

Browser support for certificates

	Windows		Mac	
	Collab	Upload	Collab	Upload
Hostname + With Trusted CA	Yes	Yes	Yes	Yes
IP Address + With Trusted CA	Yes	Yes	Yes	No

Legend:

• Hostname: Hostname to access Web Collaboration

• IP Address: IP address to access Web Collaboration

- With Trusted CA: Certificate from a trusted signing authority, or added as Trusted Root Certificate
- Collab: Using Collaboration
- Upload: Using document sharing services

Chapter 12: Troubleshooting

Client error

Outlook Plug-in link to web collaboration fails

When the Outlook plug-in link to Web Collaborationfails, the system displays the **Navigation Cancelled** page. This error occurs if you do not add the trusted root certificate to Internet Explorer. You must contact your system administrator to get the trusted root certificate.

Related links

[Installing a trusted root certificate in Internet Explorer](#) on page 50

Avaya Communicator for Windows fails

When Avaya Communicator for Windows fails, the system displays the **Navigation Cancelled** page. This error occurs if you do not add the trusted root certificate to Internet Explorer. You must contact your system administrator to get the trusted root certificate.

Related links

[Installing a trusted root certificate in Internet Explorer](#) on page 50

Document sharing error

Unable to upload a file to the library

When the trusted root certificate is not added to your browser, you see the following error message:

```
The document upload failed. The Document Conversion Server may be
unavailable at this time, possibly due to an untrusted or expired
security certificate. Please try again later. If the problem persists,
contact your administrator.
```

Contact your system administrator for the trusted root certificate. Your system administrator will share the certificate with you.

Related links

Unable to share desktop in Safari and Chrome browser

While sharing the desktop in Safari, the system might display a desktop sharing error. Ensure that you enable the IP Office Conferencing Plugin in Safari.

While sharing an application or the desktop in Chrome, the system might provide an option to install the IP Office Conferencing Collaboration Plugin. If the plug-in is already installed, ensure that you enable the plug-in in Chrome.

SIP registration failed

Cause

SIP registration not enabled.

Solution

For a user to access WebRTC, the administrator must select the **SIP Registrar Enable** check box in IP Office Manager. The check box is located at **System** > **LAN1** > **VoIP**.

If the administrator does not enable this check box then users with any extension type will not be able to access WebRTC. Also, for WebRTC to work on Server Edition machines, the Server Edition license needs to be added.

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