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Conference Manager

About Conference Manager
The Conference Manager is your tool to setup and manage meeting options.

From Conference Manager, you can
- Start an Ad Hoc Meeting
- Schedule meetings
- Contact customer support
- View online help
- Review meeting reports
Signing in to Conference Manager

To sign in to the Conference Manager

1. Enter your user name in the Login field
2. Enter your password in the Password field
3. Press enter or click the arrow button
Installing the Desktop Client

Installing the desktop client with Smart Install

Smart Install allows you to download and install the desktop client from a meeting, and rejoin the meeting after installation completes.

**Installing...**

If the install does not start, look for a browser warning and follow the directions.

If you continue to experience issues, [install manually here](#). During the install you will need to copy and paste this code to enter the meeting: 9t4o92586

Smart Install is typically initialised in one of two ways:

- On the Meeting Information tab, clicking **Install...**
- From in the Waiting Room, clicking **Install the required tools now**

While the desktop client is downloading, a popup appears at the left side of your screen that contains download and installation progress, a direct download link in case of technical difficulties, and the meeting code required to rejoin the meeting once installation has completed.

This popup will remain on top of your client window even if you navigate to other meeting tabs.

**Checking for product updates**

The Unified Meeting 5 desktop client requires occasional updates.

*Note:* You will be prompted to install new updates when you log in to the desktop launcher.

**To check for updates**

1. Navigate to the Meeting Information tab
2. Click **Check for updates**...
3. Follow installation prompts if updates are required, otherwise click **OK**
Installing the desktop client on Mac

Smart Install is unavailable for the Mac desktop client. Unlike the PC client, the desktop client for Mac does not automatically add a launcher icon to your application dock.

To install the desktop client on Mac

1. After joining a meeting using the web client, click the Meeting Information tab
2. Click Install the required tools now
3. Navigate to the download folder and open the installer
4. Follow the Apple installer confirmation prompts
   
   Note: You may need to provide your network login credentials.

Checking for product updates

The Unified Meeting 5 desktop client requires occasional updates.

To check for updates

1. Navigate to the Meeting Information tab
2. Click Check for updates...
3. Follow installation prompts if updates are required, otherwise click OK
Enabling the Unified Meeting 5 Plug-In in Chrome and Firefox

By default, Google Chrome and Mozilla Firefox disable the Unified Meeting 5 plug-in after the desktop client is installed. If either is your default browser, you must manually enable the meeting plug-in prior to starting or joining meetings from the desktop launcher, meeting invitations or Conference Manager.

*Note:* Your meetings will default to the web client until the plug-in is enabled.

You may need to specify that you are the moderator and enter your log in credentials.

### Google Chrome

#### Enabling the Unified Meeting 5 Plug-In before a meeting

1. Open Google Chrome
2. Enter `chrome://plugins/` in the Chrome search bar
3. Scroll to the Unified Meeting 5 plug-in and click **Enable**
4. Check **Always Allowed**

To enable the Unified Meeting 5 plug-in after starting or joining a meeting:

1. In the Chrome search bar, click the blocked plug-in button 🗼
2. Toggle **Always allow plug-ins**…
3. Click **Done**
   *Note:* The Unified Meeting 5 desktop client will launch the next time you start or join a meeting.

### Mozilla Firefox

#### Enabling the Unified Meeting 5 Plug-In before a meeting

1. Open Mozilla Firefox
2. In the menu bar, click **Tools > Add-Ons**
3. Click **Plugins**
4. Scroll to the Unified Meeting 5 plug-in and select **Always Activate** in its dropdown menu
The Desktop Launcher

Desktop launcher overview

The desktop launcher icon (signed in) or (signed out) appears on your Windows® system tray after you have installed the desktop client. By clicking this icon, you can quickly access several Unified Meeting 5 features, including:

- Starting a meeting
- Scheduling meetings
- Accessing product help
- Configuration options
Signing in to the desktop launcher

Once you’ve installed the desktop client and launched it from Windows® Start menu, the Unified Meeting 5 desktop launcher icon is displayed in the Windows® system tray in the bottom right corner of your screen.

To sign in to the desktop launcher

1. Right click the desktop launcher icon in your system tray and select Sign In.

   Enter Conference Manager
   Options...
   Start Meeting
   Join Meeting
   Help
   Sign In
   Exit

2. Enter your user name and password. Optional: Select Always sign in automatically to be automatically signed in whenever Desktop Launcher starts.

3. Click OK to sign in.

   Once you have signed in, the desktop launcher icon will change to.

Signing out of desktop launcher

You can sign out of desktop launcher at any time. Doing so will not remove you from an active meeting and will not log you out of Conference Manager. However, you must log back in to the desktop launcher to initiate the Conference Manager or meeting client from your desktop.

To sign out of the desktop launcher

1. Right click the meeting center icon in your system tray and select Sign Out.

   Note: You will not be prompted to confirm or cancel your sign out.
Joining a meeting from the desktop launcher

Once you've installed the desktop client and launched it from Windows® Start menu, the Unified Meeting 5 desktop launcher icon is displayed in the Windows® system tray in the bottom right corner of your screen. You can select to join a meeting from the launcher menu whether or not you are signed in.

**To join a meeting from the desktop launcher**

1. Right click the Unified Meeting 5 icon (signed out) or (signed in) in your system tray and select **Join Meeting**.

<table>
<thead>
<tr>
<th>Schedule a Meeting</th>
<th>Enter Conference Manager</th>
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</thead>
<tbody>
<tr>
<td>Options…</td>
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</tr>
</tbody>
</table>

   **Start Meeting**
   | Join Meeting      |
   | Help              |
   | Check for Updates Now… |
   | Sign Out          |
   | Exit              |

2. In the login menu, enter the login or meeting number for the meeting you want to join.

3. Click the **Go** button to connect.

4. After entering your business card information and selecting a connection type, click **Join Meeting**.
Starting a meeting from the desktop launcher

Once you've installed the desktop client and launched it from Windows® Start menu, the desktop launcher icon is displayed in the Windows® system tray in the bottom right corner of your screen. When you have signed in, you can create a meeting from the desktop launcher menu.

To start a meeting from the desktop launcher

1. After signing in, right click on the desktop launcher icon in your system tray and select **Start Meeting**.

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<tr>
<td>Sign Out</td>
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<tr>
<td>Exit</td>
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Scheduling meetings from the desktop launcher

After installing the desktop client, a meeting can be scheduled at any time from Microsoft Outlook®, Office Communicator, or by selecting **Schedule a Meeting** from the Unified Meeting 5 launcher icon in your Windows taskbar. The Microsoft Outlook® meeting invitation includes all information necessary to connect to the meeting and reserves the time slot on the invitee’s Microsoft Outlook® calendar if they accept.

*Note: If you schedule a meeting for yourself, you are the moderator of the meeting by default.*

**To schedule a meeting from the Windows taskbar**

1. Right click the Unified Meeting 5 icon
2. Select **Schedule a Meeting**
   - On enabled accounts, select either **Unified Meeting (Web + Audio)** or **Call Manager (Audio Management)**
3. Enter a start and end time for the meeting
   By default, the meeting is scheduled for 30 minutes from the nearest bottom of the hour or half hour.
4. Add a subject line
Accessing Conference Manager from the desktop launcher

Once you’ve installed Unified Meeting 5 and launched it from Windows® Start menu, the Unified Meeting 5 desktop launcher icon 🛡️ is displayed in the Windows® system tray in the bottom right corner of your screen. When you have signed in, you can access Conference Manager from the desktop launcher menu.

To access Conference Manager from the desktop launcher

1. After signing in, right click on the desktop launcher icon 🛡️ in your system tray and select **Enter Conference Manager**

<table>
<thead>
<tr>
<th>Schedule a Meeting</th>
<th>Enter Conference Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Options...</td>
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</table>

**Start Meeting**
- Join Meeting

**Help**
- Check for Updates Now…
- Sign Out
- Exit
Checking for updates from the desktop launcher

Once you've installed Unified Meeting 5 and launched it from Windows® Start menu, the Unified Meeting 5 desktop launcher icon is displayed in the Windows® system tray in the bottom right corner of your screen. When you have signed in, you can check for updates from the desktop launcher.

To check for updates from the desktop launcher

1. After signing in, right click on the desktop launcher icon in your system tray and select **Check for Updates Now**...
Accessing help from the desktop launcher

Once you've installed Unified Meeting 5 and launched it from Windows® Start menu, the Unified Meeting 5 desktop launcher icon is displayed in the Windows® system tray in the bottom right corner of your screen. When you have signed in, you can access help documentation for the desktop launcher from the launcher menu. The desktop launcher help documentation is a part of the Conference Manager help guide.

To access help documentation from the desktop launcher

1. After signing in, right click on the desktop launcher icon in your system tray and select Help...

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<thead>
<tr>
<th>Schedule a Meeting</th>
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</thead>
<tbody>
<tr>
<td>Enter Conference Manager</td>
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<tr>
<td>Options...</td>
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<td><strong>Start Meeting</strong></td>
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<td>Join Meeting</td>
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<td><strong>Help</strong></td>
</tr>
<tr>
<td>Check for Updates Now...</td>
</tr>
<tr>
<td>Sign Out</td>
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<tr>
<td>Exit</td>
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Setting desktop launcher options

Once you’ve installed Unified Meeting 5 and launched it from Windows® Start menu, the Unified Meeting 5 desktop launcher icon is displayed in the Windows® system tray in the bottom right corner of your screen. When you have signed in, you can check for Unified Meeting 5 client updates from the launcher menu.

To modify the desktop launcher options

1. After signing in, right click on the desktop launcher icon in your system tray and select Options...

   | Schedule a Meeting |
   | Enter Conference Manager |
   | Options… |
   | Start Meeting |
   | Join Meeting |
   | Help |
   | Check for Updates Now… |
   | Sign Out |
   | Exit |

**Desktop launcher options**

The desktop launcher options menu allows you to enable or disable product features such as automatic updating, or modifying settings such as default language or your email templates for Quick Invite.

**Desktop launcher options**

- **Startup options**
  - Run automatically when Windows® starts
  - Always sign in automatically

- **Update options**
  - Toggle automatic updating

- **Change the default language settings**

- **Update your e-mail templates**
The Mac Desktop Launcher

Mac desktop launcher overview

The Unified Meeting 5 desktop launcher icon (signed in) or (signed out) appears on your Mac® menu bar after you have installed the desktop client. By clicking this icon, you can quickly access several Unified Meeting 5 features, including:

- Scheduling a meeting
- Starting a meeting
- Configuration options
Signing in to the Mac desktop launcher
Once you've installed the desktop client, you can use the Mac desktop launcher to easily schedule and start meetings..

To sign in to the Mac desktop launcher
1. After installing Unified Meeting 5, navigate to the Applications folder
2. Run Unified Meeting 5
3. Enter your login credentials
Scheduling a meeting from the Mac desktop launcher

Scheduling a meeting on Mac differs from Windows in the following areas:

- Invitations will not be sent using Outlook by default. Instead, the program that is set to handle .ics files will be used to send the invitation.
- The language of the email template cannot be changed from the invitation itself as in Windows. When you first sign in using the Mac desktop client, a template is downloaded in the language used by the client.
- Quick Invite for MAC does not have IM integration.
- Mac users cannot schedule meetings for multiple accounts using the delegate feature.

When sending an invitation, the invitation opens in the default program set to handle .ics files, such as Outlook or iCal. The meeting start time defaults to the nearest top or bottom of the hour and can be changed as required. A standard email template is included as the body of the email, and invitees can be added or removed as necessary.

To schedule a meeting from the Mac desktop launcher

1. Click the Unified Meeting 5 icon in your menu bar and select Create Meeting Invitation
2. In the email client, set the subject and start time
3. Add required invitees
4. Review the email template that appears in the body of the email and make any necessary additions or modifications
5. Send the email
Starting a meeting from the Mac desktop launcher

After signing in to the Mac desktop launcher, you can create a meeting from the desktop launcher menu.

**To start a meeting from the desktop launcher**

1. Click the desktop launcher icon in your menu bar and select **Start Meeting**
2. Enter your login name and password
3. Click the **Go** button to connect to the meeting
Setting Mac desktop launcher options
After signing in to the Mac desktop launcher, you can make changes to settings such as your language options and your launcher icon style

**To change your language settings**
1. Click the desktop launcher icon in your menu bar and select Settings...
2. Select your preferred language from the dropdown menu
3. Close the window

**To change your launcher icon style**
1. Click the desktop launcher icon in your menu bar and select Settings...
2. Select or deselect **Use black and white menu bar icon**
3. Close the window
Logging out of the Mac desktop launcher

You can sign out of the Mac desktop launcher from the **Settings...** page of the launcher menu.

**To sign out of the Mac desktop launcher**

1. Click the desktop launcher icon ⚙️ in your menu bar and select **Settings...**
2. Click **Logout**

   **Note:** *There is no confirmation prompt when logging out.*
Joining a meeting from Conference Manager
You can join a meeting from the Conference Manager sign-in page, before logging in.

To join a meeting from Conference Manager
1. On the Conference Manager login screen, click the **Join Meeting** tab.
2. In the login menu, enter the login or meeting number for the meeting you want to join.
3. Click the **Go** button 🕊 to connect.
4. After entering your business card information and selecting a connection type, click **Join Meeting**.
Creating Meetings in Conference Manager

Starting a meeting with Quick Start

A new meeting can be created at any time from the Conference Manager lobby, or by selecting **Start Meeting** from the Unified Meeting 5 launcher icon in your Window's taskbar.

Four audio connection options are available when you start, or connect to, a meeting. To connect to a meeting as a web-only participant, select **Dial In** from the audio connection menu and disregard the connection information. This information can be retrieved in-meeting from the Meeting Information tab.

### Audio connection options

<table>
<thead>
<tr>
<th>Audio Connection</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Me</td>
<td>☀️</td>
<td>Select Call Me to have Unified Meeting 5 automatically dial your number. Call Me prompts for your phone number and extension if applicable. You must provide this information in order to join the meeting.</td>
</tr>
<tr>
<td>Dial In</td>
<td>☛</td>
<td>Select Dial In to manually dial in to the meeting. Dial In displays the phone number and conference code for the meeting, as well as your Leader PIN if applicable. Depending on your location, you may have the option of local or international dial in numbers. <strong>Note:</strong> The Dial In number, Conference Code, and Identification Code can be found in-meeting under the Info Tab.</td>
</tr>
</tbody>
</table>
To start a meeting from Conference Manager

1. Choose one of either:
   a. On the WELCOME tab, click the arrow button.
   b. Click the **Start Meeting** button at the top right of the screen.

2. If required, enter a display name
   You can also add title, company, and email information by clicking the furled corner on the bottom right of the business card.

3. Select a voice connection option from the My Audio Connection menu

4. Click the **Start Meeting** button to connect

To start a meeting from your windows taskbar

1. Right click the Unified Meeting 5 icon.

2. Select **Start Meeting**

3. If required, enter a display name
   You can also add title, company, and email information by clicking the furled corner on the bottom right of the business card.

4. Select a voice connection option from the My Audio Connection menu

5. Click the **Start Meeting** button to connect
Inviting Meeting Participants

**Inviting meeting participants**

After starting a meeting, participants can be invited to join in one of three ways:

- From the **Meeting Information** tab, manually copy and paste the invitation link into IM or email
- Invite participants using Quick Invite
- Invite participants using Dial Out
Inviting participants with Quick Invite
The Quick Invite tool allows you to quickly invite users to a meeting using their email address.

If you provided network login credentials when prompted after installing the desktop client, Quick Invite syncs with your email or corporate contacts and allows you to search for users in your corporate address book.

**Note:** Quick Invite does not have IM integration in the Mac client.

To invite participants using Quick Invite

1. Click **Invite** on the tool bar.
2. Enter the e-mail address of the invitee. If you provided your login credentials after installing the desktop client, you can also search for a contact by name.
3. Click the name of the invitee when it appears in the search results, or enter their entire e-mail address.
   **Note:** To add additional invitees, begin typing the name of the invitee, or type a semicolon and enter their email address. A combination of names and email addresses can be added to the list.
4. Click **Send Invitation**.
Inviting participants with Dial Participant(s)

As a moderator, you can invite one or more participants to join the audio portion of a meeting with Dial Participant(s). Dial Participant(s) can also be used to connect a web-only participant to the meeting by phone.

The Dial Participant(s) feature is accessible from both the toolbar and individual user cards.

To invite a participant

1. Click Audio > Dial Participant(s) in the Toolbar
2. Enter their contact information:
   - If you previously entered your network credentials and the contact is in your address book, begin typing their name and then select it from the drop down menu when it generates
     If you have previously used Dial Participant(s) to invite a participant, their name will appear in the drop-down menu when you begin typing it
   - If the contact is not in your address book, select their country code and enter their phone number
     You can also enter a display name for the user to identify them when they first join the meeting
     Note: Phone numbers can only contain the following characters: 0 1 2 3 4 5 6 7 8 9 ( ) # *,
3. Click Dial to place the call or Cancel to return to the meeting.

To invite multiple participants

1. Click Audio > Dial Participant(s) in the Toolbar.
2. If the contact is in your address book, begin typing their name.
   Otherwise, select their country code and enter their phone number. You can also enter a display name for the user to identify them in the meeting.
   Note: Phone numbers can only contain the following characters: 0 1 2 3 4 5 6 7 8 9 ( ) # *,

3. Click **Dial more participants** to enter additional contacts.
4. Click **Dial** to place the call to all participants, or **Cancel** to return to the meeting.

**Connect a web-only participant to audio with Dial Participant(s)**

Dial Participant(s) can be used to connect a web-only participant to the meeting by audio. After sending the Dial Participant(s) invitation, the user's phone will be dialed and they will be prompted to join the audio meeting. Once they enter the meeting by phone, the separate web and audio connections are merged.

**To connect a web-only participant to audio**

1. Click the **Dial Participant** button on their business card.
2. If you previously entered your network credentials and the participant is in your address book, begin typing their name. Otherwise, select their country code and enter their phone number.  
   *Note: Phone numbers can only contain the following characters: 0 1 2 3 4 5 6 7 8 9 ( ) # * ,*
3. Click **Dial** to place the call or **Cancel** to return to the meeting. When the participant accepts the call, they will connect to the meeting via audio and their web and audio connections will be merged.
Ending a meeting
While participants can disconnect at any time, only a moderator can end a meeting.

To end a meeting
1. Click the x on the browser window or the title bar.
2. Select either:
   - Disconnect all
     Disconnects all participants and closes the meeting window.
   - Disconnect all participants and me on
     Disconnects all participants but leaves you connected to the meeting with the meeting window open.
   - Choose another option...
     Select a combination of:
     - Disconnect me from Web or Audio
     - Disconnect everyone else from Web or Audio
3. Click OK to end the meeting and perform the chosen action(s), or click Cancel to return to the meeting.
Reports

About reports
Web summary reports can be created that contain information about meeting activity within a specified period, including the number of participants, entry and exit times, and completed polls.
Viewing web summary reports

To view a Web Summary Report for a completed meeting

1. In the Conference Manager, click Reports > Web Summary Report
2. If necessary, use the date fields or the time window buttons to specify the date of the meeting that you would like to view
3. Click the name of the meeting to view it's Web Summary Report
Exporting a web summary report

To export a Web Summary Report as a .csv file, complete these steps

1. In the Conference Manager, click **Reports > Web Summary Report**
2. If necessary, use the date fields or the time window buttons to specify the date of the meeting that you would like to view
3. Click the Export as CSV file button in line with your chosen meeting
4. Your browser will prompt you to choose a location to save the .csv file, or it will save it to the default download directory
Recordings

About recordings
Meetings can be recorded and archived for future reference. Recorded meetings are listed in the Recordings section of Conference Manager.
Depending on your account type, charges may be incurred for recording a meeting.
Playing a recording

To play a meeting recording

1. Click **Meetings > Recordings**
2. Click the **Play** button in line with the recorded archive you would like to play
   
   *Note: Clicking the Play button launches the archive player*

3. When the archive player is loaded, click the **play** button
Downloading and playing a recording

To download and play a meeting recording

1. Click Meetings > Recordings
2. Click the Download button in line with the recording that you want to download
   The .zip of the archive will begin downloading
3. Extract the .zip file to a convenient location
4. Open index.html in your browser
   Note: Opening index.html launches the recording player and automatically begins playback.
Finding the expiry and renewal dates of a hosted recording

To view the expiry and renewal dates of a hosted archive
  1. In the Conference Manager, click **Meetings > Recordings**
  2. Click the name of the recording that you would like to view
  3. In the Recording Properties window, the expiry and renewal dates are listed on the Hosted tab
Deleting a recording

To delete a meeting recording

1. In the Conference Manager, click Meetings > Recordings
2. Select any number of recordings that you would like to permanently delete
3. Click Delete checked items
4. Click Yes to confirm
Setting a recording as public or private

To set a recorded archive as public or private

1. In the Conference Manager, click Meetings > Recordings
2. Click the name of the recording that you want to make public or private
3. On the Hosted tab of the Recording Properties window, check or uncheck the "Enable participant access" option to set the recording as public or private

*Note: By default, recordings are set as "Public" when created.*
Setting, changing, and deleting the password for a recording

To set, change, or delete the password for a recording

1. In the Conference Manager, click **Meetings > Recordings**
2. Click the name of the recording that you want to edit
3. On the Password tab, enter the password you want to set for this recording, or leave the field blank to make this archive publicly available
4. Click **OK**
Meeting Client

Unified Meeting 5 Overview
Unified Meeting 5 is your tool for managing and participating in meetings. From Unified Meeting 5, you can:

- Invite participants to join the meeting
- Dial out to moderators and participants
- Lock or unlock meetings
- Control in-meeting audio settings such as hard and soft muting
- See whose talking and sort the participant list alphabetically or by recent speaker
- Dismiss participants or uninvited users
- Close the meeting
## System Requirements

<table>
<thead>
<tr>
<th></th>
<th>Desktop Client</th>
<th>Web Client</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating System</strong></td>
<td>• Microsoft® Windows XP SP3 / Vista / 7 / 8</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• MAC OS X 10.6 (Snow Leopard) or higher</td>
<td></td>
</tr>
<tr>
<td><strong>CPU</strong></td>
<td>• 1 GHz processor - Windows</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• x86 processor - MAC</td>
<td></td>
</tr>
<tr>
<td><strong>RAM</strong></td>
<td>1GB required for Windows or MAC</td>
<td></td>
</tr>
<tr>
<td><strong>Disk Space Required</strong></td>
<td>• 16 GB - Windows</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 8 GB - MAC</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Requirement is based on OS disk space requirement and does not include usage-dependent storage such as thumbnails, contacts, invitation templates, and log files.</td>
<td></td>
</tr>
<tr>
<td><strong>Browser</strong></td>
<td>• Microsoft Internet Explorer® 8 or higher</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Google Chrome™ 11 or higher</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Mozilla® FireFox® 10 or higher</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Safari® 5.1 or higher</td>
<td></td>
</tr>
<tr>
<td><strong>Network Connection</strong></td>
<td>• High-Speed DSL/Cable or faster</td>
<td></td>
</tr>
<tr>
<td><strong>Presentation sharing</strong></td>
<td>• Microsoft PowerPoint® 2003 or higher - Windows</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Calendar Integration</strong></td>
<td>• Microsoft Outlook® 2003 or higher - Windows</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• ICS Supported Calendar - MAC</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Contacts Integration</strong></td>
<td>• Microsoft Outlook® 2003 and higher - 32Bit - Windows</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• LDAP Integration - Windows/MAC</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• MAC Address Book - MAC</td>
<td></td>
</tr>
<tr>
<td><strong>Instant Messenger Integration</strong></td>
<td>• Lync - Windows</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>• Office Communicator - Windows</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Skype - Windows</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Instant Messenger integration is available for Windows only.</td>
<td></td>
</tr>
<tr>
<td><strong>Recording Viewing</strong></td>
<td>Same OS/Browser as Participant Browser MP3 support</td>
<td></td>
</tr>
<tr>
<td><strong>Avatar Camera</strong></td>
<td>Flash Plug-In</td>
<td></td>
</tr>
</tbody>
</table>
**Meeting Client**

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<td><strong>Note:</strong> <em>Windows only.</em></td>
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**Browser Client**

The system requirements below are for the browser client only.

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<td></td>
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1GB required for Windows or MAC

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**Note:** *Requirement is based on OS disk space requirement and does not include usage-dependent storage such as thumbnails, contacts, invitation templates, and log files.*

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</tr>
<tr>
<td>• 3G or faster - Mobile</td>
<td></td>
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</tbody>
</table>

**Recording Viewing**

Same OS/Browser as Participant Browser MP3 support

<table>
<thead>
<tr>
<th>Avatar Camera</th>
<th></th>
</tr>
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<tbody>
<tr>
<td>• Flash Plug-In</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** *Windows only.*
Getting Started

The desktop and web clients
Unified Meeting 5 offers both a desktop client and browser-based web client for starting, managing, and participating in meetings.

Desktop client and web client features

<table>
<thead>
<tr>
<th>Client Type</th>
<th>Corporate Contacts Integration</th>
<th>Connect by phone</th>
<th>Connect by VoIP</th>
<th>Connect via web</th>
<th>Launch from desktop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop</td>
<td>■</td>
<td>■</td>
<td>■</td>
<td>■</td>
<td>■</td>
</tr>
<tr>
<td>Web</td>
<td>■</td>
<td>■</td>
<td>■</td>
<td>■</td>
<td></td>
</tr>
</tbody>
</table>

While adequate for participants, the web client offers fewer features than the desktop client.
User roles
Your privileges and in-meeting capabilities are determined by your user type.

Moderator and participant permissions

Moderator
- End a meeting
- Dismiss participants
- Connect to a meeting by web or audio
- Invite user with quick invite
- Invite users with Call Participant(s)
- Send meeting-wide chat messages
- Manage chat settings
- Lock or unlock a meeting
- Manage audio options

Participant
- Connect to a meeting by web or audio
- Send meeting-wide chat messages

Moderators

- Moderators are the only user type that can schedule or start a meeting.
- Moderators have control over a meeting's settings, including audio alerts.
- When ending a meeting, moderators can choose to either disconnect but leave the meeting running, or to close the meeting and disconnect all connected users. Moderators can also lock and unlock an in-progress meeting to restrict participant access.

Participants

- Participants can send and receive chat messages, and join or exit the meeting at any time.
Installing the Desktop Client

Installing the desktop client with Smart Install

Smart Install allows you to download and install the desktop client from a meeting, and rejoin the meeting after installation completes.

Smart Install is typically initialised in one of two ways:

- On the Meeting Information tab, clicking **Install...**
- From in the Waiting Room, clicking **Install the required tools now**

While the desktop client is downloading, a popup appears at the left side of your screen that contains download and installation progress, a direct download link in case of technical difficulties, and the meeting code required to rejoin the meeting once installation has completed.

This popup will remain on top of your client window even if you navigate to other meeting tabs.

Checking for product updates

The Unified Meeting 5 desktop client requires occasional updates.

*Note:* You will be prompted to install new updates when you log in to the desktop launcher.

To check for updates

1. Navigate to the Meeting Information tab
2. Click **Check for updates...**
3. Follow installation prompts if updates are required, otherwise click **OK**
Installing the desktop client on Mac

Smart Install is unavailable for the Mac desktop client. Unlike the PC client, the desktop client for Mac does not automatically add a launcher icon to your application dock.

To install the desktop client on Mac

1. After joining a meeting using the web client, click the Meeting Information tab
2. Click Install the required tools now
3. Navigate to the download folder and open the installer
4. Follow the Apple installer confirmation prompts

*Note: You may need to provide your network login credentials.*

Checking for product updates

The Unified Meeting 5 desktop client requires occasional updates.

To check for updates

1. Navigate to the Meeting Information tab
2. Click Check for updates...
3. Follow installation prompts if updates are required, otherwise click OK
Enabling the Unified Meeting 5 Plug-In in Chrome and Firefox

By default, Google Chrome and Mozilla Firefox disable the Unified Meeting 5 plug-in after the desktop client is installed. If either is your default browser, you must manually enable the meeting plug-in prior to starting or joining meetings from the desktop launcher, meeting invitations or Conference Manager.

**Note:** *Your meetings will default to the web client until the plug-in is enabled.*

You may need to specify that you are the moderator and enter your log in credentials.

**Google Chrome**

---

### Enabling the Unified Meeting 5 Plug-In before a meeting

1. Open Google Chrome
2. Enter `chrome://plugins/` in the Chrome search bar
3. Scroll to the Unified Meeting 5 plug-in and click **Enable**
4. Check **Always Allowed**

To enable the Unified Meeting 5 plug-in after starting or joining a meeting:

1. In the Chrome search bar, click the blocked plug-in button 
2. Toggle **Always allow plug-ins…**
3. Click **Done**

   **Note:** *The Unified Meeting 5 desktop client will launch the next time you start or join a meeting.*

**Mozilla Firefox**

---

### Enabling the Unified Meeting 5 Plug-In before a meeting

1. Open Mozilla Firefox
2. In the menu bar, click **Tools > Add-Ons**
3. Click **Plugins**
4. Scroll to the Unified Meeting 5 plug-in and select **Always Activate** in its dropdown menu
User Profiles

User profile overview
Unified Meeting 5 provides a flexible user profile system that allows you to create custom profiles, or to load profile information from your Facebook and LinkedIn accounts. This information is then used to populate your in-meeting business card, and can be saved for future use.

Profile creation and management is accessed from the Quick Start menu by clicking the Custom Profile, LinkedIn, or Facebook buttons under your business card. You can also modify your profiles in-meeting from your business card.
Creating a custom profile
Unified Meeting 5 lets you create custom profiles with editable title, company, and e-mail address fields. By default, the profile is saved for use in future meetings.

To create a custom profile

1. From the Quick Start screen, mouse over the business card and click the Flip button
2. Enter a display name
3. (Optional) Enter a title, company, and email address
4. Select Remember Me
   Remember Me is selected by default. Deselecting this option prevents your business card information from being saved for future meetings.
5. Optionally, add a location.
6. Select your connection type and then click Start or Join Meeting to save your business card information and connect to your meeting.
**Loading profile information from LinkedIn**

Unified Meeting 5 lets you connect to your LinkedIn accounts and automatically populate the title, company, and e-mail address fields of your Unified Meeting 5 business card. By default, the login information provided for LinkedIn will not expire, and the business card information can quickly be recalled in later meetings by clicking the LinkedIn button in the Quick Start menu.

**To create a profile using your LinkedIn account**

1. From the Quick Start screen, click the LinkedIn button.
2. In the LinkedIn login popup, enter your LinkedIn login credentials in the required fields.
3. Click **Ok, I’ll Allow It** to authenticate  
   *Note: You can modify the information in any of the fields populated by LinkedIn before saving your profile.*
4. Click **Yes** to save the profile information.
Loading profile information from Facebook

Unified Meeting 5 lets you connect to your Facebook accounts and automatically populate the title, company, and e-mail address fields of your Unified Meeting 5 business card. By default, the login information provided for Facebook will not expire, and the business card information can quickly be recalled in later meetings by clicking the Facebook button in the Quick Start menu.

To create a profile using your Facebook account

1. From the Quick Start screen, click the Facebook button
2. In the Facebook Login popup, enter your Facebook login credentials in the required fields
   - Click Keep me logged in to automatically authenticate your Facebook profile in later meetings
3. Click Log In
   
   **Note:** Depending on your Facebook security settings, you may also have to provide a device name for your IUnified Meeting 5 profile.
   
   **Note:** You can modify the information in any of the fields populated by Facebook before saving your profile.
4. Click Yes to save the profile information
Creating a Meeting as a Moderator

Starting a meeting with Quick Start
A new meeting can be created at any time from the Conference Manager lobby, or by selecting Start Meeting from the Unified Meeting 5 launcher icon in your Window's taskbar.

Four audio connection options are available when you start, or connect to, a meeting. To connect to a meeting as a web-only participant, select Dial In from the audio connection menu and disregard the connection information. This information can be retrieved in-meeting from the Meeting Information tab.

Audio connection options

<table>
<thead>
<tr>
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<td>Call Me</td>
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<td>Select Call Me to have Unified Meeting 5 automatically dial your number. Call Me prompts for your phone number and extension if applicable. You must provide this information in order to join the meeting.</td>
</tr>
<tr>
<td>Dial In</td>
<td>☑️</td>
<td>Select Dial In to manually dial in to the meeting. Dial In displays the phone number and conference code for the meeting, as well as your Leader PIN if applicable. Depending on your location, you may have the option of local or international dial in numbers. <strong>Note:</strong> The Dial In number, Conference Code, and Identification Code can be found in-meeting under the Info Tab.</td>
</tr>
</tbody>
</table>
Audio Connection | Icon | Description
--- | --- | ---
Already On Audio | ![Icon](146x660 to 168x682) | Select Already On Audio if you are already connected to the audio portion of the meeting.

VoIP | ![Icon](148x592 to 166x610) | Select VoIP to use your microphone and computer speakers or headphones to connect to the meeting. VoIP allows you to establish a Voice over Internet Protocol (VoIP) connection to the meeting. The VoIP feature includes calibration options for your microphone and headphone/speaker audio levels.

*Note: The desktop client is required for VoIP. You may be prompted to enter a security code in the VoIP keypad.*

To start a meeting from Conference Manager

1. Choose one of either:
   - On the WELCOME tab, click the arrow button.
   - Click the **Start Meeting** button at the top right of the screen.
2. If required, enter a display name
   You can also add title, company, and email information by clicking the furled corner on the bottom right of the business card.
3. Select a voice connection option from the My Audio Connection menu
4. Click the **Start Meeting** button to connect

To start a meeting from your windows taskbar

1. Right click the Unified Meeting 5 icon
2. Select **Start Meeting**
3. If required, enter a display name
   You can also add title, company, and email information by clicking the furled corner on the bottom right of the business card.
4. Select a voice connection option from the My Audio Connection menu
5. Click the **Start Meeting** button to connect
Ending a meeting
While participants can disconnect at any time, only a moderator can end a meeting.

To end a meeting

1. Click the x on the browser window or the title bar.
2. Select either:
   **Disconnect all**
   Disconnects all participants and closes the meeting window.
   **Disconnect all participants and me on**
   Disconnects all participants but leaves you connected to the meeting with the meeting window open.
   **Choose another option...**
   Select a combination of:
   - Disconnect me from Web or Audio
   - Disconnect everyone else from Web or Audio
3. Click OK to end the meeting and perform the chosen action(s), or click Cancel to return to the meeting.
Joining a Meeting as a Participant

Joining a meeting

Four audio connection options are available when you start, or connect to, a meeting. To connect to a meeting as a web-only participant, select Dial In from the audio connection menu and disregard the connection information. This information can be retrieved in-meeting by navigating to the Info Tab.

Audio connection options

<table>
<thead>
<tr>
<th>Audio Connection</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Me</td>
<td></td>
<td>Select Call Me to have Unified Meeting 5 automatically dial your number. Call Me prompts for your phone number and extension if applicable. You must provide this information in order to join the meeting.</td>
</tr>
<tr>
<td>Dial In</td>
<td></td>
<td>Select Dial In to manually dial in to the meeting. Dial In displays the phone number and conference code for the meeting, as well as your Leader PIN if applicable. Depending on your location, you may have the option of local or international dial in numbers. <strong>Note:</strong> The Dial In number, Conference Code, and Identification Code can be found in-meeting under the Info Tab.</td>
</tr>
<tr>
<td>Already On Audio</td>
<td></td>
<td>Select Already On Audio if you are already connected by telephone to the audio portion of the meeting.</td>
</tr>
</tbody>
</table>
### Audio Connection

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="VoIP" /></td>
<td>Select VoIP to use your microphone and computer speakers or headphones to connect to the meeting. VoIP allows you to establish a Voice over Internet Protocol (VoIP) connection to the meeting. The VoIP feature includes calibration options for your microphone and headphone/speaker audio levels. <strong>Note:</strong> The desktop client is required for VoIP. You may be prompted to enter a security code in the VoIP keypad.</td>
</tr>
</tbody>
</table>

To connect as a web-only participant, select Dial In from the audio connection menu and disregard the connection information. This information can be retrieved in-meeting from the Info Tab. To access the Info Tab, click the gear button 🛠️.

### To join a meeting as a new user

1. After entering the Quick Start menu from the invitation link, enter a display name. You can also add title, company, and email information by clicking the furled corner on the bottom right of the business card.
2. Select a voice connection option from the My Audio Connection menu.
3. Click the **Join Meeting** button to launch the meeting.
Exiting a meeting
You can exit the meeting at any time. The meeting will remain running until it is closed by a moderator.

To exit a meeting

1. Click the X button on the browser title.
2. Click Ok to confirm your exist, or Cancel to return to the meeting.

Note: If you exit the meeting by closing the browser window, you will not be prompted to confirm your exit.
Inviting Meeting Participants

Inviting participants with Dial Participant(s)

As a moderator, you can invite one or more participants to join the audio portion of a meeting with Dial Participant(s). Dial Participant(s) can also be used to connect a web-only participant to the meeting by phone.

The Dial Participant(s) feature is accessible from both the toolbar and individual user cards.

To invite a participant

1. Click Audio > Dial Participant(s) in the Toolbar
2. Enter their contact information:
   - If you previously entered your network credentials and the contact is in your address book, begin typing their name and then select it from the drop down menu when it generates
   - If you have previously used Dial Participant(s) to invite a participant, their name will appear in the drop-down menu when you begin typing it
   - If the contact is not in your address book, select their country code and enter their phone number
     You can also enter a display name for the user to identify them when they first join the meeting
     *Note: Phone numbers can only contain the following characters: 0 1 2 3 4 5 6 7 8 9 ( ) # *

3. Click Dial to place the call or Cancel to return to the meeting.

To invite multiple participants

1. Click Audio > Dial Participant(s) in the Toolbar.
2. If the contact is in your address book, begin typing their name.
   Otherwise, select their country code and enter their phone number. You can also enter a display name for the user to identify them in the meeting.
Note: Phone numbers can only contain the following characters: 0 1 2 3 4 5 6 7 8 9 ( ) # *,

3. Click **Dial more participants** to enter additional contacts.

4. Click **Dial** to place the call to all participants, or **Cancel** to return to the meeting.

Connect a web-only participant to audio with Dial Participant(s)

Dial Participant(s) can be used to connect a web-only participant to the meeting by audio. After sending the Dial Participant(s) invitation, the user’s phone will be dialed and they will be prompted to join the audio meeting. Once they enter the meeting by phone, the separate web and audio connections are merged.

**To connect a web-only participant to audio**

1. Click the **Dial Participant** button on their business card.

2. If you previously entered your network credentials and the participant is in your address book, begin typing their name. Otherwise, select their country code and enter their phone number. **Note: Phone numbers can only contain the following characters: 0 1 2 3 4 5 6 7 8 9 ( ) # *,

3. Click **Dial** to place the call or **Cancel** to return to the meeting. When the participant accepts the call, they will connect to the meeting via audio and their web and audio connections will be merged.
Inviting participants with Quick Invite
The Quick Invite tool allows you to quickly invite users to a meeting using their email address.

If you provided network login credentials when prompted after installing the desktop client, Quick Invite syncs with your email or corporate contacts and allows you to search for users in your corporate address book.

*Note:* *Quick Invite does not have IM integration in the Mac client.*

To invite participants using Quick Invite

1. Click **Invite** on the tool bar.
2. Enter the e-mail address of the invitee. If you provided your login credentials after installing the desktop client, you can also search for a contact by name.
3. Click the name of the invitee when it appears in the search results, or enter their entire e-mail address. *Note:* *To add additional invitees, begin typing the name of the invitee, or type a semicolon and enter their email address. A combination of names and email addresses can be added to the list.*
4. Click **Send Invitation**.
Scheduling Meetings

Scheduling meetings for yourself

After installing the desktop client, a meeting can be scheduled at any time from Microsoft Outlook®, Office Communicator, or by selecting **Schedule a Meeting** from the Unified Meeting 5 launcher icon in your Window’s taskbar. The Microsoft Outlook® meeting invitation includes all information necessary to connect to the meeting and reserves the time slot on the invitee’s Microsoft Outlook® calendar if they accept.

**Note:** If you schedule a meeting for yourself, you are the moderator of the meeting by default.

To schedule a meeting from the windows taskbar

1. Right click the Unified Meeting 5 icon
2. Select **Schedule a Meeting**
   - On enabled accounts, select either **Unified Meeting (Web + Audio)** or **Call Manager (Audio Management)**
3. Enter a start and end time for the meeting
   By default, the meeting is scheduled for 30 minutes from the nearest bottom of the hour or half hour.
4. Add a subject line
5. Add any required invitees
6. Click **Send**

To schedule a meeting from Microsoft Outlook®

1. In Outlook, create a new Calendar event
2. In the Microsoft Outlook® Appointment window toolbar, click the **Web + Audio** button to populate the body with an invitation template
   **Note:** While the invitation template contains all information necessary to connect to the meeting, you can add additional information or edit the template as required. To select a different language for the template, click the drop down arrow.
   - On enabled accounts, select one of either **Web + Audio** or **Audio Management** depending on your meeting requirements
3. Select a start and end time for the meeting
   By default, the meeting will be scheduled for 30 minutes beginning from the nearest bottom of the hour or half hour.
4. Add a subject line
5. Add any required invitees
6. Click **Send**

To schedule a meeting from Office Communicator
1. In Office Communicator, right click on the name of an invitee and select **Schedule a Meeting**

2. In the Microsoft Outlook® Appointment window toolbar, click the **Unified Meeting 5 Details** button to populate the body with an invitation template

   **Note:** While the invitation template contains all information necessary to connect to the meeting, you can add additional information or edit the template as required. To select a different language for the template, click the drop down arrow.

3. Select a start and end time for the meeting
   By default, the meeting will be scheduled for 30 minutes beginning from the nearest bottom of the hour or half hour.

4. Add a subject line

5. Add any additional invitees

6. Click **Send**
Scheduling meetings for other accounts

You can schedule a meeting for someone else if your account is enabled as a delegate. You must also have the desktop client installed in order to access the delegate menu.

Before you can schedule a meeting for someone else, you must first add their account to your list of user logins in the Manage Accounts menu.

To add a user to the delegate menu

1. Right click the Unified Meeting icon
2. Select Manage Accounts
3. Click Schedule for Others
4. Click Add Account
5. Enter the user's login name and add any notes or comments under the Description column.
   Note: Their password is not required.
6. Click the + button

User logins can also be edited by first clicking on them and then making any necessary modifications.

To delete a user from the delegate menu

1. Right click the Unified Meeting icon
2. Select Manage Accounts
3. Select Schedule for Others
4. Click the - button adjacent to the account you want to delete.
   Note: There is no confirmation prompt to delete a user login.

To schedule a meeting for another user

1. Right click the Unified Meeting icon
2. Select Schedule a Meeting
3. Click the desired user from the list of available options
4. Select a start and end time for the meeting.
   By default, the meeting will be scheduled for 30 minutes beginning from the nearest bottom of the hour or half hour.
5. Add a subject line
6. Add any required invitees
7. Click Send
Scheduling meetings on Mac

Scheduling a meeting on Mac differs from PC in the following areas:

- Invitations will not be sent using Microsoft Outlook® by default. Instead, the program that is set to handle .ics files will be used to send the invitation.
- The language of the email template cannot be changed from the invitation itself as in Windows. When you first sign in using the Mac desktop client, a template is downloaded in the language used by the client.
- Quick Invite for MAC does not have IM integration.
- Mac users cannot schedule meetings for multiple accounts using the delegate feature.

When a user chooses to send an invitation, the invitation will open in the default program set to handle .ics files, such as Microsoft Outlook® or iCal. The meeting start time defaults to the nearest top or bottom of the hour and can be changed as required. A standard email template is included as the body of the email, and invitees can be added or removed as necessary.
Dual Account Management

Dual Account overview
On enabled accounts, both Reservationless-Plus and Unified Meeting 5 accounts can be tied to one desktop launcher, allowing you to start or schedule meetings with either service.

The Dual Account feature allows you to start or schedule either a Reservationless-Plus or Unified Meeting 5 depending on your feature requirements. For example, meetings that require audio-only participation or a reduced feature set can be scheduled with Reservationless-Plus, while meetings video or presentation sharing can be scheduled with Unified Meeting 5.

Note: Your billing will reflect the services used.

Unified Meeting 5 vs Call Manager Feature Comparison

Unified Meeting 5
- Share (Present)
- Share (Video)
- Meeting recording
- Connect by phone
- Connect by VoIP
- Connect via web
- Launch from desktop
- Polls (Created)
- Polls (Responded)
- Video

Reservationless-Plus
- Meeting recording
- Connect by phone
- Connect by VoIP
- Connect via web
- Launch from desktop

Note: This feature comparison assumes the desktop client is installed.
Dual Account management

On enabled accounts, both Call Manager and Unified Meeting 5 accounts can be tied to the desktop launcher, allowing you to start or schedule meetings with either service.

Accounts are managed through the Manage Accounts popup, accessed through Manage Accounts in the Launcher menu. The account that can be added to the Launcher is dependant on the credentials used to log in. A Reservationless-Plus account can be added if logged in with Unified Meeting 5 credentials, or a Unified Meeting 5 account if logged in with Reservationless-Plus.

To add a Reservationless-Plus or Unified Meeting 5 account

1. Right click the Unified Meeting 5 icon
2. Click Manage Accounts
3. Click either Add Reservationless-Plus or Add Unified Meeting 5
   
   **Note:** Which option is available is dependant on the credentials used to log in.
4. If adding a Reservationless-Plus account, enter your Conference Code and Leader PIN
   
   If adding a Unified Meeting 5 account, enter your Login and Password
5. (Optional) Enter a description
6. Click the + button

To delete a Reservationless-Plus or Unified Meeting 5 account

1. Right click the Unified Meeting 5 icon
2. Click Manage Accounts
3. Click the - button adjacent to the account you want to delete

   **Note:** There is no confirmation prompt to delete a user login.
Starting meetings with Dual Account

A new meeting by clicking **Start Meeting** from the Unified Meeting 5 launcher icon in your Window's taskbar. If a second account has been tied to your desktop launcher, you will be prompted to select which account to start the meeting with.

**To start a meeting from your windows taskbar with Dual Account**

1. Right click the Unified Meeting 5 icon
2. Select **Start Meeting**
3. Select one of either **Web + Audio** (Unified Meeting 5) or **Audio Management** (Reservationless-Plus)
4. If required, enter a display name
   (Optional) Add title, company name, and email information by clicking the furled corner on the bottom right of the business card.
5. Select a voice connection option from the My Audio Connection menu
6. Click the **Start Meeting** button to connect
Scheduling meetings with Dual Account

After installing the desktop client, a meeting can be scheduled at any time from Microsoft Outlook®, Office Communicator, or by selecting Schedule a Meeting from the Unified Meeting 5 launcher icon in your Window's taskbar. The Microsoft Outlook® meeting invitation includes all information necessary to connect to the meeting and reserves the time slot on the invitee's Microsoft Outlook® calendar if they accept.

When scheduling meetings with Dual Account, you must select either a Web + Audio (Unified Meeting 5) or Audio Management (Reservationless-Plus) meeting. Your selection determines what type of meeting is scheduled and generates an invitation with the correct connection information.

**Note:** If scheduling a meeting for yourself, you are the moderator of the meeting by default.

To schedule a meeting from the windows taskbar

1. Right click the Unified Meeting 5 icon
2. Select Schedule a Meeting
3. Select either Web + Audio (Unified Meeting 5) or Audio Management (Reservationless-Plus)
4. Enter a start and end time for the meeting
   By default, the meeting is scheduled for 30 minutes from the nearest bottom of the hour or half hour.
5. Add a subject line
6. Add any required invitees
7. Click Send

To schedule a meeting from Microsoft Outlook®

1. In Microsoft Outlook®, create a new Calendar event
2. In the Microsoft Outlook® Appointment window toolbar, click either the Web + Audio (Unified Meeting 5) or Audio Management (Reservationless-Plus) button to populate the body with an invitation template
   **Note:** While the invitation template contains all information necessary to connect to the meeting, you can add additional information or edit the template as required. To select a different language for the template, click the drop down arrow.
3. Enter a start and end time for the meeting
   By default, the meeting will be scheduled for 30 minutes beginning from the nearest bottom of the hour or half hour.
4. Add a subject line
5. Add any required invitees
6. Click Send

To schedule a meeting from Office Communicator

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1. In Office Communicator, right click on the name of an invitee and select **Schedule a Meeting**

2. In the Microsoft Outlook® Appointment window toolbar, click either the **Web + Audio** (Unified Meeting 5) or **Audio Management** (Reservationless-Plus) button to populate the body with an invitation template.  
   *Note: While the invitation template contains all information necessary to connect to the meeting, you can add additional information or edit the template as required. To select a different language for the template, click the drop down arrow.*

3. Enter a start and end time for the meeting.  
   By default, the meeting will be scheduled for 30 minutes beginning from the nearest bottom of the hour or half hour.

4. Add a subject line

5. Add any additional invitees

6. Click **Send**
Connecting to audio with Dial In

If you are connected to a meeting by web only, you can send an audio invitation to yourself using Dial In. Dial In automatically dials your phone number and extension (if applicable), and connects you by phone to the current meeting.

Alternatively, select VoIP to connect to the meeting with you speakers and microphone, or select Dial In to display the dial-in and conference numbers for manually connecting to the meeting.

To connect to audio with Call Me

1. Click the Dial In button on your business card.
2. To connect using your telephone, select **Dial In**.
   1. Select your country from the drop-down menu.
   2. Enter your phone number and extension (if applicable).
      
      **Note**: Phone numbers can only contain the following characters: 0 1 2 3 4 5 6 7 8 9 ( ) # *,
      
   3. Click **Ok**
   4. After clicking **Ok** and answering your phone, follow the operator instructions to connect to the meeting.
3. To display the call-in information to manually connect to the meeting, select **Dial In**.
4. To connect using your speakers and microphone, select **VoIP**.
   1. (Optional) To calibrate your speakers and microphone, click **Choose devices and adjust levels**
   2. Click **Ok**
Merging web and audio connections

In some circumstances, you may find your audio connection unlinked from your web connection.

For example, if you join a meeting by telephone and later connect with the web client, there will be two instances of you in the meeting: one for your web client connection and one for your audio connection. If this occurs, the two connections can be merged into one.

**Note:** The moderator must be merged with the audio leader line to access some audio controls, such as lecture muting and entrance alerts.

To merge separate web and audio connections

1. Open the context menu of either the web or audio business card.
2. Select **Merge Web and Audio**.
3. If merging the audio connection to the web connection, select the web connection display name from the list. Otherwise, select the phone number.
4. Click **Yes** to commit the merge or **No** to return to the meeting.

Splitting Web and Audio

If you merge the wrong phone number and display name, or you want to disconnect from the meeting by web or audio while leaving the other connected, you can split your web and audio connections.

To split web and audio

1. Right click on your business card.
2. Click **Split Web and Audio**
   
   **Note:** There is no confirmation popup when splitting a web and audio connection.
VoIP settings

The VoIP settings menu allows you to select your audio input and output devices, and to adjust volume levels.

![Computer Audio Settings](image)

The settings menu can be accessed from three areas:

1. From the **Choose devices and adjust levels (Optional)**... link under VoIP on the Quick Start page
2. From **Choose devices and adjust levels** in the toolbar menu’s **Audio** dropdown
   
   **Note:** The VoIP keypad can also be accessed from the dropdown menu.
3. From the VoIP flyout menu on your business card

To change your output device

1. In the VoIP Settings menu, select the output device from the dropdown menu
2. Click **OK**
To change your input device

1. In the VoIP Settings menu, click the Input Devices button.
2. Select the input device from the dropdown menu.
3. Click OK.
User Interface

Breakout Rooms

Breakout rooms overview
Meetings can be organised into breakout rooms. Breakout rooms allow moderators to sort users into separate subconference rooms, and are useful for scenarios such as training sessions. Multiple breakout rooms can be opened in one meeting.

Users in one breakout room cannot hear the audio lines of users in other breakout rooms, or in the main room. Users cannot view content being shared in other rooms, or send and receive chat messages to users in other rooms. However, users can interact with each other within a breakout room as normal, and can send and receive chat messages from the meeting moderator regardless of what room the moderator is in. The moderator can add or remove users to breakout rooms, move between breakout rooms, or close any or all of the rooms.

Waiting room exceptions

As a moderator, the following meeting management options are unavailable unless you are in the same room as the affected user:

- Passing sharing control
- Muting or unmuting a user
- Disconnecting a user’s audio connection
- Dismissing a user from the meeting
Breakout room features for moderators
The breakout room features for moderators allow for the easy management of multiple rooms within a single conference. While participants are limited to their typical options regardless of whether they are in the main room or a breakout room, moderators can rename, organise, or close breakout rooms as required.

Creating and managing a breakout room

To open a breakout room

1. From the participant list, open the business card menu of the user that will be sent to the breakout room
2. Click Move to
3. Select from the list of breakout rooms
   - You can filter the list by entering keywords in the search field.
   - **Note:** Up to fifteen breakout rooms can be active. The room labels can be updated to make the rooms more recognisable. New rooms cannot be created above the fifteen default rooms.

To change the room label

1. Click the room tab in the breakout room bar
2. Click Edit label
3. Enter the room label (maximum of 25 characters)
4. Click OK
   - **Note:** The room label will take the form of "Room # - ####". For example, renaming "Room 3" to "Sales" results in the new room label "Room 3 - Sales".
   - **Note:** Only active breakout rooms can be renamed.

To move to a breakout room

1. Open your business card menu
2. Click Move to
3. Select from the list of breakout rooms
   - You can also move to an active breakout room by clicking its label in the breakout room bar, and selecting Move me to this room from the dropdown menu.

To move to a user to a breakout room

1. Open the business card menu of the user that will be sent to the breakout room
   - If you are not in the same room as the affected user, you must either enter the room
they are in, or locate their business card in the View All panel available by clicking in the breakout room menu.

2. Click Move to
3. Select from the list of breakout rooms

**To close a room**

1. Click the room tab in the breakout room bar
2. Click Close this room
3. Click Yes to close the room and send all participants to the main room

To close all rooms, click in the breakout room bar.

**Filtering the participant list with active breakout rooms**

Users distributed into breakout rooms will only appear in the participant panel of their breakout room. They will not appear in the participant panel of the Main room, or of any breakout room that they are not attending. However, moderators can view a list of all meeting attendees by clicking in the breakout room menu to open the View All panel. The participant list in the View All panel displays business or minicards for users in the meeting, sortable by name or room, and filterable by room.
Business Cards

**Business cards overview**

Business cards store user information for use during meetings. They contain a display name, e-mail address, social networking, and location information, and can be edited or updated at any time. Business cards can also display custom avatars and user pictures.

After clicking on **Start Meeting**, your business card template is displayed under the My Information column of the quick start menu. New and returning users can load information from LinkedIn or Facebook, while returning users will display their previously entered information by default.

**Note:** *The display name is the only required field. All other fields are optional.*

While creating a business card is not required to join a meeting, opting out prevents your user information from being saved for later use.

Once a user login is created, it is stored locally on your computer.
**Business card formats**

Business cards are displayed in two ways: a large business card that appears in the main meeting tab, and a smaller minicard generated with the participant list.

The full-sized business card appears in the main meeting tab when the meeting has too few users to generate the participant list, or when the participant list has been minimised.

The front of the business card displays a full-size version of your user picture as well as your user status (moderator or participant), connection status (web, audio, or both), and the Call Participant(s) and business card menu buttons.

Clicking the curled corner on the bottom right of the card flips it over. The back of the card contains your name, email address, company and title information, and geocached weather information for your area. This information can be changed or modified at any time by clicking on the relevant field.

The smaller minicard appears in the participant list when it is generated in a large meeting, or when it is expanded.

The minicard displays a scaled-down copy of your user picture and contains your name, user type, connection information, and the Call Participant(s) button.

Clicking the minicard expands to display your connection information, title, company and email address, geocached weather information, and the business card menu button.

This information can be changed or modified at any time by clicking on the relevant field.
Business card menu

The business card menu is available on both full-size user cards and minicards by clicking the menu button accessible by mousing over the user picture on full-sized cards or clicking and expanding the minicards in the participant list.

The following tables provide an overview of the business card menu items by user type and connection.

**Moderator - own card**

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Web Only</th>
<th>Web &amp; Audio</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mute/Unmute</td>
<td></td>
<td></td>
<td>Mute or unmute yourself.</td>
</tr>
<tr>
<td>Move to</td>
<td></td>
<td></td>
<td>Move yourself to a breakout room such as the waiting room.</td>
</tr>
<tr>
<td>Split web and audio</td>
<td></td>
<td></td>
<td>Split your web and audio connections into separate connections.</td>
</tr>
<tr>
<td>Disconnect audio</td>
<td></td>
<td></td>
<td>Disconnect your audio connection.</td>
</tr>
<tr>
<td>Properties</td>
<td></td>
<td></td>
<td>Access meeting properties.</td>
</tr>
<tr>
<td>Join audio</td>
<td></td>
<td></td>
<td>Connect with audio with Call Participant(s).</td>
</tr>
<tr>
<td>Merge web and audio</td>
<td></td>
<td></td>
<td>Merge separate web and audio connections.</td>
</tr>
</tbody>
</table>

**Moderator - other/participant card**

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chat</td>
<td>Send a one-on-one chat message to the user.</td>
</tr>
<tr>
<td>Pass control</td>
<td>Pass presentation sharing control to the user.</td>
</tr>
<tr>
<td>Mute/unmute</td>
<td>Mute or unmute the user.</td>
</tr>
<tr>
<td>Split web and audio</td>
<td>Split the user's web and audio connections.</td>
</tr>
<tr>
<td>Replay name</td>
<td>Replay the name provided by the user when they connected via audio.</td>
</tr>
<tr>
<td>Dismiss participant</td>
<td>Dismiss the user from the meeting.</td>
</tr>
<tr>
<td>Disconnect audio</td>
<td>Disconnect the user's audio connection.</td>
</tr>
<tr>
<td>Properties</td>
<td>Access meeting properties.</td>
</tr>
<tr>
<td>Move to</td>
<td>Move the user to a breakout room such as the waiting room.</td>
</tr>
<tr>
<td>Merge web</td>
<td>Merge a user's separate web and audio connections.</td>
</tr>
</tbody>
</table>
and audio

*Note:* Available menu items are dependant on the user's connection type.

### Participant - own card

<table>
<thead>
<tr>
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<th>Web Only</th>
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<td>Mute or unmute yourself</td>
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<tr>
<td>Split web and audio</td>
<td></td>
<td></td>
<td>Split your web and audio connections into separate connections.</td>
</tr>
<tr>
<td>Disconnect audio</td>
<td></td>
<td></td>
<td>Disconnect your audio connection.</td>
</tr>
<tr>
<td>Exit meeting</td>
<td></td>
<td></td>
<td>Access meeting properties.</td>
</tr>
<tr>
<td>Properties</td>
<td></td>
<td></td>
<td>Access meeting properties</td>
</tr>
<tr>
<td>Merge web and audio</td>
<td></td>
<td></td>
<td>Merge separate web and audio connections.</td>
</tr>
<tr>
<td>Join audio</td>
<td></td>
<td></td>
<td>Connect with audio with Call Participant(s).</td>
</tr>
</tbody>
</table>

### Participant - other card

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chat</td>
<td>Send a one-on-one chat message to the user.</td>
</tr>
<tr>
<td>Properties</td>
<td>Access meeting properties</td>
</tr>
</tbody>
</table>

*Note:* Available menu items are dependant on the user's connection type.
My Picture

My Picture overview

My Picture allows you to change and modify the picture that appears on your business card during a meeting. While Unified Meeting 5 comes pre-loaded with a selection of stock avatars, you can also upload a picture or take a photo using a webcam or camera connected to your computer.

![Edit My Picture]

The maximum avatar size is 175x175 pixels. Unified Meeting 5 automatically detects larger images and allows you to resize and crop them to fit your business card.

Your picture can be changed at any time, including during meetings.
Selecting a default picture

Instead of using a photo or image from your computer, you can use a default avatar from the Unified Meeting 5 library.

Default pictures come pre-loaded with the Unified Meeting 5 client and do not require re-sizing or cropping.

To use a default avatar from the My Picture library

1. Click the Select an Image button on your business card.
2. Select one of the default avatars from the drop-down menu.
Browsing for an image

You can browse for an image on your hard drive to use as your user picture. While the maximum picture size is 176x176 pixels, larger images can be scaled and cropped to size.

To browse for an image

1. Click the Select an Image button on your business card
2. Click the Browse button
3. Navigate to the location of your image on your hard drive
4. Select the desired image and click Open
5. If the image is larger than the maximum avatar size, drag the desired portion of the image to the cropping box and/or resize the image using the resizing tool
6. Click Done to set it as your avatar, or Cancel to return to the meeting.

*Note:* You can cancel the picture while it's loading by clicking the Cancel button.
Taking a photo

If a webcam is connected to your computer, you can take a photo to use as your in-meeting picture.

Computers without a connected webcam will not have the option of taking a photo.

Note: The Take a Photo option requires Flash Player to be installed on your system. If Flash is not installed, a download link is provided.

To take a photo for your avatar

1. Click the Select an Image button on your business card
2. Click the Camera button to open the Edit My Picture menu
3. Select Take a Photo from the options on the left
4. Position yourself on screen and take a picture by clicking the Camera button
   Note: You can re-take the photo by clicking the camera button again. Doing this erases the previous photo.
5. If required, use the resizing tool to re-size the photograph
   Note: Your user picture will be created using only the portion of the photograph that appears in the cropping box. The scaling tool can be used shrink or expand the photo, and the photo can be repositioned by clicking and dragging.
6. Click Done to set it as your avatar, or Cancel to return to the meeting.
   Note: You can cancel the picture while it's loading by clicking the Cancel button.
Cropping and resizing images

Because user pictures are limited to 175x175 pixels, large images and photographs must be edited to appear properly during meetings. To help accomplish this, Unified Meeting 5 allows you to crop and resize images from within a meeting.

Cropping and resizing example

Images that are larger than the maximum 175x175 will appear in the **Edit My Picture** menu, scaled to fit within the screen area.

Using the resizing tool, you can zoom in or out by clicking and dragging the button right or left.

Zooming in allows you to focuses on a more specific part of the picture.
Once the image is appropriately resized, you can click and drag the desired part of the picture inside the cropping box, and crop the picture by pressing the crop button. Cropping the image will erase all parts of the image outside of the crop box. The image within the crop box can then be used as your in-meeting picture by clicking Done.

**Note:** You can cancel the picture while it's loading by clicking the Cancel button.
Waiting Room

**Waiting room overview**

If you connect to a locked meeting, you will be redirected to the Waiting Room until the moderator unlocks the meeting, or until the moderator admits you into the meeting.

A locked meeting has had its access restricted by the moderator, and is identified by the **Lock** button icon selected and highlighted in gray. The meeting moderator is notified when you enter the waiting room.

**Waiting room features**

While in the waiting room you can modify your business card or install the desktop client by clicking the **Install the required tools now** link.

**Reconnecting to a locked meeting as a moderator**

As the moderator, if you are disconnected from a locked meeting, you may be mistakenly sent to the waiting room when you reconnect.

**To resume moderating a locked meeting after disconnection**

1. Click the **I am the moderator** link
2. Enter your moderator password
3. Click Go
**Waiting room features for moderators**

As a moderator, you have the ability to lock or unlock a meeting at any time by toggling the unlock and lock buttons in the meeting's title bar.

When a meeting is locked, all users attempting to join are redirected to the waiting room and you will be notified of their connection via popup. While in the waiting room, users will have the option to download and install the desktop client and to modify their business card information.

**Setting a waiting room message**

As a moderator, you can set a message to be displayed in the waiting room. This message is displayed to all users, and can be erased or modified at any time by repeating the steps below.

**To set a waiting room message**

1. Click the **Info Tab** button
2. Under waiting room **Message**, enter your desired message
3. Click **Post**

**Reconnecting to a locked meeting as a moderator**

As the moderator, if you are disconnected from a locked meeting, you may be mistakenly sent to the waiting room when you reconnect.

**To resume moderating a locked meeting after disconnection**

1. Click the **I am the moderator** link
2. Enter your moderator password
3. Click **Go**
Video

Video overview
Unified Meeting 5 allows meeting attendees to view and broadcast video streams. The desktop client is not required for video, and users joining a meeting with active video broadcasts are automatically subscribed to active streams.

On video-enabled accounts, broadcasts can be initialised from the toolbar by clicking the Video button. Broadcast options and camera settings are accessible from the expanded video panel.

The video panel can be popped out and repositioned on-screen, and popped back in or minimised as required. By default, the video panel will follow the current video speaker. To set your panel to a specific speaker, select their name from the drop-down menu. Active streams will also appear in the broadcasters’ business cards in the meeting room.
Video controls

Broadcasts can be initialized from the toolbar by clicking the Video button. Video options and camera settings are accessible from the expanded video panel.

To start a video broadcast

1. In the toolbar, click the Video button
2. If prompted, allow Adobe Flash Player to access your camera and microphone
3. Click the Show Video button to begin broadcasting

To end a video broadcast

Two options are available for ending a video broadcast:

1. While broadcasting, click the toolbar Video button; or,
2. Click the Stop Video button on your video stream preview

To pop out or pop in the video panel

1. At the top of the video panel, click the Pop Out button
   To pop in the video button, click the Pop In button on the popped out panel

To select a video stream

1. On the video panel, select the stream you want to watch from the dropdown menu
   Note: To have the stream automatically switch to the most recent speaker, select Follow the video speaker

To change your selected camera

1. On your video stream preview, click the Camera settings button
2. Select your webcam from the dropdown menu
3. Click OK
Meeting information tab

The meeting info tab is accessed during meetings by clicking the info tab icon at the top of the tool bar.

The meeting info tab displays the moderator for the current meeting as well as the meeting’s web address and call-in numbers. The tab also provides links to customer tools, meeting options, product updates, customer support, and the Unified Meeting 5 help guide.

Meeting info tab links

<table>
<thead>
<tr>
<th>Info Tab Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check for updates...</td>
<td>Check for updates to your desktop meeting client.</td>
</tr>
<tr>
<td>Email</td>
<td>Email customer support for technical help.</td>
</tr>
<tr>
<td>Email Product Suggestions</td>
<td>Email a suggestion for product features or improvements.</td>
</tr>
<tr>
<td>Online Help</td>
<td>Access the online help documentation.</td>
</tr>
<tr>
<td>About Unified Meeting 5</td>
<td>Review product versions, licensing information, the Terms of Service, and the Privacy Policy.</td>
</tr>
</tbody>
</table>

Logging in as a moderator from the Info Tab

If you have moderator credentials, it is possible to log in as a moderator from the Info Tab if you have already connected to the meeting as a participant.

To log in as a moderator from the Info Tab

1. Click I am the moderator... under the moderator name
2. Enter your moderator password
3. Click Go

Setting a Waiting Room message

As a moderator, you can set a message to be displayed in the Waiting Room. This message is displayed to all users, and can be erased or modified at any time by repeating the steps below.
To set a Waiting Room message

1. Click the **Info Tab** button
2. Under Waiting Room Message, enter your desired message
3. Click **Post**
Participant list
The participant panel lists all users currently in the meeting, including the moderator.

The participant panel provides filtering options, audio controls, and private messaging/chat functionality.

The user mini-cards also indicate whether a user is connecting via audio, web, or both, and provides visual cues for current speakers.

Participant list elements

The participant list contains a number of elements to help you sort and keep track of user information during a meeting.

<table>
<thead>
<tr>
<th>Element</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active speaker</td>
<td>📞</td>
<td>Located on a user's minicard, this speaker icon displays if the user is currently speaking.</td>
</tr>
<tr>
<td>Muted speaker</td>
<td>✘</td>
<td>Located on a user's minicard, this speaker icon displays if the user is currently muted.</td>
</tr>
<tr>
<td>Inactive speaker</td>
<td>📞</td>
<td>Located on a user's minicard, this speaker icon displays when the user is inactive or silent.</td>
</tr>
<tr>
<td>Connecting speaker</td>
<td>🔊</td>
<td>Located on a user's minicard, this speaker icon displays while they are connecting to the meeting.</td>
</tr>
<tr>
<td>Call Participant(s)</td>
<td>📞</td>
<td>Located on a user's minicard, the Call Participant(s) button allows you to dial out to a web-only participant. This icon disappears once the user has connected by audio.</td>
</tr>
</tbody>
</table>
### Element | Icon | Description
--- | --- | ---
Sort List | ![Icon](image) | Located on the top right of the participant list, this button opens a list sorting menu, allowing you to sort alphabetically or by recent speaker.

Filter List - Recent Speaker | ![Icon](image) | Located on the top left of the participant list, this toggling this button will filter the participant list to display only recent speakers.

Expand/Minimise List | ![Icon](image) | Located on the top left of the participant list, toggling this button minimises or expands the list, but leaves the heading intact.

Hide Participant List | ![Icon](image) | Located to the left of the participant list, this button will hide the entire list, including the participant list heading.

---

**Participant list filtering**

You can filter the participant list by two criteria: All participant view and recent speakers view.

"All participant view" is the default filter. With all participant view selected, the list displays all users currently in the meeting. The list is automatically sorted with you at top, followed by the moderator and the remaining participants in alphabetical order.

"Recent speakers view" is an optional filter. When selected, the participant list will automatically sort recent speakers to the top of the list, followed by the user, the moderator, and the remaining participants.

To change the filter setting, click either the **All participant view** button for the Recent speakers view button.
Toolbar menu

The toolbar menu contains features that help to manage and participate in meetings. The items displayed depend on your user status and whether or not a Share session is running.

The toolbar menu displays four items by default. If additional items are available, the menu can scroll left or right by clicking on the arrow buttons.

### Toolbar menu items

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Audio** | ![Audio Icon] | Set or change meeting audio settings, including:  
- Mute Self  
- Unmute all  
- Group mute all  
- Lecture mute all  
- Show keypad  
- VoIP Settings  
- Call Me  
- Call participant(s) |
| **Alerts** | ![Alerts Icon] | Set entry and exit alerts:  
- Tone  
- Name  
- None  

**Note:** If enabled for your account, this feature will not appear until you are connected by audio. Your web and audio connections must be merged. For more information about merging connections, see [Merging web and audio connections](#). |
| **Chat All** | ![Chat Icon] | Send meeting-wide chat messages. |
| **Help** | ![Help Icon] | Lists links to help and customer support resources, including:  
- Online help  
- Live chat  
- Customer support (phone)  
- Customer support (e-mail) |
| **Exit** | ![Exit Icon] | Exit the meeting (participants) or end the meeting (moderators). |

### Toolbar menu items by user type

Your menu options are limited by your user type.
<table>
<thead>
<tr>
<th>User Type</th>
<th>Annotate</th>
<th>Audio</th>
<th>Chat All</th>
<th>Help</th>
<th>Invite</th>
<th>Polls</th>
<th>Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moderator</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participant</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Meeting Tools

Application and Presentation Share

Sharing overview
The Share tab allows presenters and moderators to share applications, presentations, and desktop views with meeting participants.

The sharing options are accessible through the Share tab at the top of the Unified Meeting client. Clicking **Share** opens the sharing menu and a list of applications available to share, with the Files & Applications option selected by default. Desktop sharing and presentation sharing options are also available under the sharing menu.

**Note:** Presentation sharing is not available for the Mac client. However, Microsoft® PowerPoint presentations can still be shared on Mac using Files & Applications share.

### WHAT WOULD YOU LIKE TO SHARE?

- **FILES & APPLICATIONS**
- **ENTIRE SCREEN**
- **SCREEN AREA**
- **PRESENTATION**

**Note:** The desktop client must be installed in order to use Share. If a participant using the web browser is promoted to presenter, they will be prompted to download and install the client.

Share sharing options

<table>
<thead>
<tr>
<th>Share</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Files &amp; Applications</strong></td>
<td>📄</td>
<td>While sharing files and applications, sharing controls appear at the top of all open windows. These controls allow you to begin sharing an unshared file or application, pause sharing, stop sharing, or select a new sharing option.</td>
</tr>
</tbody>
</table>
### Share

<table>
<thead>
<tr>
<th>Share</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entire Screen</td>
<td>![Icon]</td>
<td>Selecting Entire Screen allows you to transmit your screen to meeting participants. Meeting participants will see everything that is displayed on your monitor. If you have multiple monitors connected to your computer, you will be given the choice of which monitor to share.</td>
</tr>
<tr>
<td>Screen Area</td>
<td>![Icon]</td>
<td>As with Files &amp; Applications sharing, Share controls appear at the top of the Unified Meeting client while Entire Screen sharing is active. Unlike Files &amp; Applications sharing, these controls will not appear at the top of every application window.</td>
</tr>
<tr>
<td>Presentation</td>
<td>![Icon]</td>
<td>Selecting Screen Area allows you to designate and transmit a limited area of your screen to meeting participants. To designate the screen area to be shared, you will click and drag a border to the designated size. The designated screen area can be re-sized or re-positioned at any time. Like Entire Screen sharing, the designated Screen Area window will display everything within its frame to meeting participants. However, everything appearing on-screen outside the Screen Area frame will be blocked from participants' view.</td>
</tr>
</tbody>
</table>

When you begin sharing, your Unified Meeting client minimises to only display the tool bar, participant list, and participant view.

**Note:** Selected applications, screen areas, or presentations will not be shared until you click the **START SHARING** button.

### Participant View

Presenters and moderators with an active Share are able to see a view of the shared screen, applications or presentation, with the Participant View panel. The panel loads automatically when you start sharing, and can be found beneath the participant list.
The Participant View panel can be minimised or expanded by clicking the **arrow** button.
Promoting to presenter

A participant can be granted presenter rights by the meeting moderator, enabling them to use Share. Multiple users can have presenter rights in the same meeting. In addition to allowing them to share, promoting a participant grants them meeting privileges such as muting and unmuting, and creating and sharing polls.

Note: Participants connected through the web client are required to download and install the Unified Meeting application when promoted to presenter.

Multiple presenters can be active in the same meeting. If multiple presenters attempt to share presentations, applications or desktop views at the same time, they are organised into tabs labelled with the presenter name.

Presenters can also be demoted to participants, removing their presenter privileges.

To grant presenter rights

- Select Promote to presenter from the participant's context menu.
- Click the Promote button on their business card.

Participants can also request to present during a meeting. If a participant requests to present, you will be notified via popup.

To accept a request to present

- Click Accept to promote the participant or Decline to decline the request to present.

Demoting a presenter

As a moderator, you can demote a presenter at any time during a meeting. Demoting a presenter removes their presenter privileges, including audio controls and application sharing.

Presenters can also self-demote by clicking the Demote button on their business card, or selecting Demote to participant in their business card menu. You will be notified via popup if a presenter demotes themselves.

To demote a presenter

- Either click on the demote icon on the business card; or,
- Open the participant's context menu and select Demote to participant.

The presenter will be notified that they have been demoted.
Requesting presenter rights
As a participant, you can request to present by clicking the Request promote button or selecting Request to present from your business card menu.

Note: A participant running on browser will be invited to install. Only after the installation is completed successfully, the presentation rights will be granted.

If the meeting has multiple moderators, the promotion request is sent to the moderator with audio leader capabilities. If there are multiple audio leaders, all of them receive the participant request, and the first to respond determines whether the request is accepted or declined. Other responses are ignored.

To request presenter rights

- Click the Request Promotion icon
- Right click your business card and select Request to presenter

If the moderator grants or revokes presenter rights, you will be notified via popup.

Self-demoting

As a presenter, you can self-demote by clicking the Demote button on your business card, or selecting Demote to participant from your business card menu.

Demoting to a participant will restrict your access to in-meeting audio controls, poll creation, and application sharing.
Demoting to participant
Moderators can demote presenters to participants during a meeting. Presenters can also demote themselves to participants.

To demote a presenter to a participant

- Click the Demote icon
- Right click their business card and select Demote to participant

To self-demote

- Click the Demote icon on your business card
- Right click on your business card and select Demote to participant
Passing share control
Moderators and presenters with active sharing sessions can pass control of the presentation to a participant without promoting them. Passing share control to a participant will allow them to advance or regress through slides, annotate an active presentation, or click through windows and applications on an active application, screen area or desktop share.

Once sharing has been passed, a popup will appear at the corner of your client informing you that a participant has control of the presentation. Clicking this popup will return share control to you.

The participant is notified when they receive share control, and notified again when share control has been taken back.

To pass sharing control

1. Click the menu button on the desired user's business card or minicard
2. Select Pass sharing control
Files and applications
Applications and files can be shared with meeting participants through the Share tab. Selecting Files & Applications allows you to choose from a list of open files or applications on your computer to share with meeting participants. Only the file(s) selected for sharing will be transmitted to participants, and sharing can be paused, resumed, or stopped at any time.

WHAT WOULD YOU LIKE TO SHARE?

- FILES & APPLICATIONS
- ENTIRE SCREEN
- SCREEN AREA
- PRESENTATION

To share a file or application:
1. Click the Share tab
2. Under the sharing menu, click Files & Applications
3. Select the file or application you want to share.
4. Click the Start Sharing button to begin sharing with participants.

To stop sharing a file or application:
- Click the Stop button at the top of the application window you want to stop sharing.
Or,
1. Click the Share tab
2. Click the Stop Sharing button

File and application sharing controls

While sharing files and applications, the following controls appear at the top of all application windows:
### Sharing Control

<table>
<thead>
<tr>
<th>Control</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start</td>
<td>👉</td>
<td>Clicking the <strong>Start</strong> button will begin sharing the selected application window.</td>
</tr>
<tr>
<td>Pause</td>
<td>⏸</td>
<td>Clicking the <strong>Pause</strong> button temporarily suspends Share. Participants will continue to see a paused frame of the application window that was being shared. Unpausing Share resumes sharing, with the participants’ screens automatically updating to reflect the current state of the shared window or application.</td>
</tr>
<tr>
<td>Stop</td>
<td>✅</td>
<td>Clicking the <strong>Stop</strong> button ends the Share session.</td>
</tr>
<tr>
<td>Share Menu</td>
<td>❌</td>
<td>Clicking the <strong>Share Menu</strong> button opens a mini-Share menu, allowing you to select an application to share, or switch to sharing your entire screen, a screen area, or a presentation.</td>
</tr>
</tbody>
</table>

#### Share Status

- **Sharing**: The share status indicates whether or not an application window is being shared.
- **Not Sharing**: For Application and File share, the default is Not Sharing.

**Note:** *These share controls are not available with the Mac client.*
Sharing your entire screen
Selecting Entire Screen allows you to transmit your screen to meeting participants. Meeting participants will see everything that is displayed on your monitor. If you have multiple monitors connected to your computer, you will be given the choice of which monitor to share.

Selecting the Entire Screen option from the sharing menu shares your desktop screen. If you are using multiple monitors, you will have the option of which monitor to share.

To share your entire screen:

1. Click the Share tab
2. Under the sharing menu, click Entire Screen
3. If applicable, select the monitor you want to share

**CHECK SCREEN TO SHARE:**

- [ ] [1] Plug and Play Monitor

- [x] [2] Plug and Play Monitor

**Note** *Only one monitor can be shared at a time.*

4. Click the **Start Sharing** button to begin sharing with participants.

**To stop sharing your entire screen:**

1. Click the **Share** tab
2. Click the **Stop Sharing** button

**Entire Screen sharing controls**

While sharing your entire screen, the following controls appear above the Unified Meeting toolbar:

<table>
<thead>
<tr>
<th>Sharing Control</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start</td>
<td>🎬</td>
<td>Clicking the <strong>Start</strong> button will begin sharing the selected application window.</td>
</tr>
<tr>
<td>Pause</td>
<td>⏸️</td>
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</tr>
</tbody>
</table>
### Sharing Control

<table>
<thead>
<tr>
<th>Sharing Control</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stop</strong></td>
<td><img src="image" alt="Stop Icon" /></td>
<td>Clicking the <strong>Stop</strong> button ends the Share session.</td>
</tr>
<tr>
<td><strong>Share Menu</strong></td>
<td><img src="image" alt="Share Menu Icon" /></td>
<td>Clicking the <strong>Share Menu</strong> button opens a mini-Share menu, allowing you to select an application to share, or switch to sharing your entire screen, a screen area, or a presentation.</td>
</tr>
<tr>
<td><strong>Share Status</strong></td>
<td><img src="image" alt="Share Status Icon" /></td>
<td>The share status indicates whether or not an application window is being shared. For Application and File share, the default is Not Sharing.</td>
</tr>
</tbody>
</table>

**Note:** *These share controls are not available with the Mac client.*
Sharing a screen area

Selecting Screen Area allows you to designate and transmit a limited area of your screen to meeting participants. To designate the screen area to be shared, you must click and drag a border to the desired size. The designated screen area can be re-sized or re-positioned at any time.

WHAT WOULD YOU LIKE TO SHARE?

- FILES & APPLICATIONS
- ENTIRE SCREEN
- SCREEN AREA
- PRESENTATION

Selecting Screen Area from the sharing menu allows you to click and drag a screen area border. This border can be re-sized and re-positioned as needed.

When sharing with Screen Area, only files and applications that are positioned within the designated screen area are broadcast to meeting participants.

To share a screen area:

1. Click the Select Area button to select the area to be shared.
2. Click and drag the mouse to select the area to be shared.
3. Click the Start Sharing button to begin sharing the selected area.

**Note:** Pressing Esc will cancel the area selection.

To stop sharing a file or application:

1. Click the Share tab.
2. Click the Start Sharing button to stop sharing.
Presentations

Sharing a presentation

Selecting Presentation allows you to share a Microsoft® PowerPoint slide show with meeting participants. You will be prompted to either choose from a list of recently-shared presentations, or to browse for a new presentation on your computer.

WHAT WOULD YOU LIKE TO SHARE?

- FILES & APPLICATIONS
- ENTIRE SCREEN
- SCREEN AREA
- PRESENTATION

Selecting Presentation from the sharing menu opens a list of Microsoft® PowerPoint presentations available for sharing. By default, the list includes the most recently used presentations. To select a presentation other than those in the list, click Browse... and navigate to the presentation file.

After selecting a presentation and sharing it with the meeting, you can navigate through the slides in real time. You can also make temporary annotations to the slides that will appear to meeting participants, but will not be saved to the presentation file.

To share a presentation:

1. Select a presentation from the list, or click Browse... to navigate to a new presentation file.
2. Click the START SHARING button to begin sharing the selected area

To stop sharing a presentation:

- Click the STOP SHARING button
Presentation controls

When you begin sharing a presentation, a list of slides appears on the left hand of the screen while the currently-selected slide displays in the center. The currently selected slide is highlighted with a green border. Clicking on a slide will automatically share it with participants.

Located at the bottom of the screen, the Previous button and Next button navigate through the slides.

Keyboard shortcuts are also available:

- The Up Arrow and Down Arrow keys advance the presentation backwards or forwards
- The Enter key advances the presentation forward one slide

You can also end the presentation share by clicking the Stop Sharing button.
Annotations

While running a Share session, various annotation tools are available to aid in your presentation. These tools can be used to mark, highlight, or emphasise text and images in the presentation.

The annotation tools can be used in with all Share options, including application and screen sharing.

Annotation tools

<table>
<thead>
<tr>
<th>Annotation tool</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marker</td>
<td>![Marker Icon]</td>
<td>The marker tool lets you draw solid lines on your presentation using your mouse. The marker tool is useful for emphasising or marking areas of a presentation.</td>
</tr>
<tr>
<td>Highlighter</td>
<td>![Highlighter Icon]</td>
<td>The highlighter tool lets you draw semi-transparent lines on your presentation using your mouse. The highlighter tool useful for highlighting and emphasising text.</td>
</tr>
<tr>
<td>Arrow stamps</td>
<td>![Arrow Stamps Icon]</td>
<td>The arrow stamp tool lets you place left or right arrows on a presentation with the click of a mouse.</td>
</tr>
</tbody>
</table>

To annotate

1. Click the **Annotate** button in the toolbar to open the annotations menu.
2. Select your annotation type: marker, highlighter, or arrow stamps.
   
   **Note:** Annotation tools are only available to presenters during an active Share session. The annotation tools menu will remain open until you click **Stop annotating**, press your **Esc** button, or click the **x** to close the menu.
   
   - When annotating with the marker or highlighter, the color and thickness can be changed from the annotations menu.
   
   ![Annotation Tools Menu]
   
   - Holding shift while clicking and dragging with the marker or highlighter will draw a straight line.

To erase annotations
You can erase annotations in one of three ways:

- Click the **Annotate** button in the toolbar to open the annotations menu.
- To clear the last made annotation, select **Clear last**.
- To clear all annotations, select **Clear all**.

**To stop annotating**

You can stop annotating in one of three ways:

- Clicking **Stop annotating** in the annotation tools menu
- Clicking the **x** button in the annotation tools menu
- Pressing the **Esc** button on your keyboard
Polls

Polls overview
Polls offer a simple method of gauging participant opinions or gathering feedback during a meeting.
Polls can be created and distributed at any point during a meeting by moderators only. However, participants are free to respond to a poll and view the polling results.
Multiple polls can be created and sent during a meeting, and polls that have been closed can be re-distributed or deleted as required.
Poll results can be exported in .CSV format for future reference by downloading the results to your browser's default download directory.
Creating a poll

The poll menu is located in the toolbar at the top of the Unified Meeting client.

To create a poll

1. In the toolbar, click Polls.
2. Click the Add a Poll button.
3. Enter your poll question and answers.
   To add additional answers, click Add a response.
   Note: The maximum number of answers is five.
4. To immediately distribute the poll to the meeting, click Send.
   To save the poll for later in the meeting, click the arrow button to minimise the poll window.
Sharing a poll

To share a poll that was created but not yet shared

1. In the toolbar, click Polls
2. Click the poll you want to send
   At this point, you can also make any necessary edits before sending the poll.
3. To immediately distribute the poll to the meeting, click Send
   To save the poll for later in the meeting, click the arrow button to minimise the poll window

To re-send a poll that was already shared in the meeting

1. In the toolbar, click Polls
2. Click the closed poll that you want to re-send
3. Click Edit and make any necessary edits
   Note: You must click Edit in order to re-send the poll even if you do not make edits to the question or answer fields.
4. To immediately distribute the poll to the meeting, click Send
   To save the poll for later in the meeting, click the arrow button to minimise the poll window
Responding to a poll

When a poll is distributed by a moderator, it automatically opens for participants in the meeting.

The poll can be minimised without responding by clicking the **arrow** button ➤. Before submitting your own answers, you can also review poll results as they are received by clicking **Results**.

To respond to a poll

1. Under each question, select your desired answer
   
   Every poll will have one or more questions and between one and five answers

2. When you have finished the poll, submit your answers by clicking **Vote**
Viewing poll results
The results for closed polls are available to moderators and participants through the Polls menu.
Poll results can be reviewed even if the poll has not yet been closed.

To view poll results for a closed poll

1. In the toolbar, click Polls
2. On the desired poll, click View poll results

To view poll results for an open poll

1. In the toolbar, click Polls
2. On the desired poll, click Results
Exporting poll results
Poll results can be exported in .CSV format for later reference. They are downloaded to your browser download directory by default.

*Note:* *Only polls that have been closed can be exported.*

To export a poll

1. In the toolbar, click **Polls**
2. Click on the desired poll
3. Click the **Export** button
   
   If using the web client, the poll is exported to your browser's default download directory.
Deleting a poll

A poll that is closed or has not been sent can be deleted from the list of polls in the poll menu.

In-progress polls must be closed before they can be deleted.

To delete a poll

1. In the toolbar, click **Polls**
2. Click the x button beside the poll you want to delete
3. Click **Delete** to delete the poll
Chat

Chat overview

Unified Meeting 5 allows you to communicate via chat with individual participants, a selected user group, or the entire meeting.

Incoming chat messages appear as chat tabs at the bottom of your screen. If more tabs are opened than can fit on your screen, scroll arrows appear that allow you to navigate through the tabs. Blinking tabs indicate new or unread messages. If a message is received in an off-screen tab, the scroll arrow button will blink to notify you. The audio notification for incoming chat messages can be enabled or disabled in the settings menu accessible from the status bar.

Chat tabs display the name of the sender, the time when the last message was received, the first line of the most recent message, and the number of unread messages.

Tabs can be expanded or minimised, undocked to floating chat bubbles, or closed at any time.

If the chat tab is docked and expanded, it expands from its position at the bottom of the screen. It can be minimised back to a tab by clicking the Minimise button.

If the chat tab is undocked, it expands into a moveable chat box that can be repositioned anywhere on screen.
Chatting with active Share

When a chat message is received while Share is running, a chat panel expands below the Participant List.

Note: If you are presenting, the chat window will expand below your Participant View panel.

If you receive multiple messages, each message is minimised to a chat card in the chat panel. Messages from new users appear at the bottom and push the list up, while new messages from previous senders will return them to the bottom of the list. To reply to a message, expand the chat card by pressing the Expand button at the top of the card.

If the chat panel is minimised, the most recent message appears in the minimised tab displaying the first line of the new message, the name of the sender, and the number of new messages from the sender.

If the panel is collapsed, clicking on the most recent message will expand the chat window for that user only. To respond to older messages, the chat panel must first be expanded.

If the Share presentation is fully expanded and covering the participant list and chat panel, new messages appear in chat bubbles at the side of the screen. These chat bubbles can be expanded as normal.

When a Share presentation begins, the chat window defaults to expanded if there are active chats, or otherwise maintain its status when Share is initiated - it will remain expanded if it was previously expanded, or minimised if it was previously minimised.
One-on-one chat

Initiating one-on-one chat opens a chat window on your screen. When you send your first message, the recipient will be notified with a blinking chat tab at the bottom of their client window.

You can minimise the chat window to a tab, or click the undock button undock the window and reposition it on your screen.

To initiate one-on-one chat

- Click the Chat button on the business card of the participant you want to chat with; or,
- Click the participant's context menu and select Chat
Chat all
Chat all allows you to send a message to all meeting participants.

While meeting-wide chats are similar to private or group chats, they do not display a participant’s name in the titlebar. Instead, a Chat All message is labelled All.

You can minimise the chat window to a tab, or click the undock button undock the window and reposition it on your screen.

To send a meeting-wide message

- Click the Chat all button in the toolbar.
**Group chat**

In addition to private chat and Chat All, you can open a group chat with two or more users within a meeting. A group chat can contain moderators and participants, and there is no limit on the number of users that can be connected to the same group chat.

You can minimise the chat window to a tab, or click the **undock** button undock the window and reposition it on your screen.

**To initiate group chat**

Choose one of the following methods to initiate group chat:

- Drag and drop a business card into an open chat window
- CTRL + left click on multiple user cards and drag them into an open chat window
- CTRL + left click on multiple user cards and then right click and select **Group Chat**
- Click the **Invite...** link at the bottom of the chat window and select users to add to the chat

*Note: If you drag user cards into a private chat window, the private chat participant is included in the group chat.*
Personalised Invitation Links

**Personalised invitation links overview**
Your meeting link can be personalised from the **Edit my link** menu on the Meeting Information tab.

WEB This is a secure meeting

Copy and paste the invitation link into IM or email:

https://my.intercall.com/mymeeting

Edit my link

Newly created links can immediately be used to start or join meetings, and the invitation email templates will be updated within 24 hours. To immediately update your email templates, select **Options...** from the desktop launcher, and click **Update...** under Schedule Tool - Email Templates.

**Note:** You must manually update previously scheduled or recurring meetings.

Personalised links can be updated or modified at any time. Up to three links can be active at once.
Creating a personalised invitation link

Your meeting link can be personalised from the Edit my link menu on the Meeting Information tab.

After creating your link, a confirmation email will be sent to the address associated with your account.

To create a personalised invitation link

1. On the Meeting Information tab, click Edit my link
2. Enter your personalised link in the Create a new link field:
   **Note:** Your link can only contain the following characters: A-Z a-z 0-9 - _
3. Click OK
**Updating your default link**

Your default meeting link is the link used in meeting invitations and quick invites. It can be updated at any time from the **Edit my link** menu on the Meeting Information tab.

While only one link can be set as the default, up to three links can be active at a time. Anyone attempting to connect using an older - but still active - link will be joined to your meeting.

**To update your default link**

1. On the Meeting Information tab, click **Edit my link**
2. Click the radio button adjacent to the link you want to use as the default
3. Click **OK**
Deleting a personalised invitation link

Personalised invitation links can be deleted from the Edit my link menu on the Meeting Information tab.

Deleted links will no longer work to join your meetings.

Note: If you attempt to create more than three personalised links, you will be prompted to delete an older link.

To delete a personalised invitation link

1. On the Meeting Information tab, click Edit my link
2. Click the X icon ✗ adjacent to the link you want to delete
3. Click Delete to confirm
4. Click OK
Meeting Management

Promoting and Demoting Participants

Promoting and demoting
You can promote a participant to a presenter at any time during a meeting. Promoting a participant grants them meeting privileges such as muting and unmuting, creating and sharing polls, and application sharing.

*Note:* Participants connected through the web client are required to download and install the Unified Meeting application when promoted to presenter.

Multiple presenters can be active in the same meeting. If multiple presenters attempt to share presentations, applications or desktop views at the same time, they are organised into tabs labelled with the presenter name.

Presenters can also be demoted to participants, removing their presenter privileges.
**Promoting a participant**

You can promote a participant to a presenter at any time during a meeting. Promoting a participant grants them meeting privileges such as muting and unmuting, creating and sharing polls, and application sharing.

Users can also request to present during the course of a meeting by clicking the **Request promote** button on their business card, or selecting **Request to present** from their business card menu. If a user requests to present, you are notified via pop-up.

When a web client user is promoted to presenter, they are invited to download and install the desktop client. They are reconnected to the meeting after the installation completes.

If they decline the invitation to install, they will not be able to share presentations with Share.

**To promote a participant**

You can promote a participant in one of two ways:

- Click on the **Promote** button on the participant card
- Open the participant's context menu and select **Promote to presenter**.

**To accept a request to present**

- Click **Accept** to promote the participant or **Decline** to decline the request to present.

**Requesting to present**

As a participant, you can request to present by clicking the **Request promote** button or selecting **Request to present** from your business card menu.

*Note: A participant running on browser will be invited to install. Only after the installation is completed successfully, the presentation rights will be granted.*

If the meeting has multiple moderators, the promotion request is sent to the moderator with audio leader capabilities. If there are multiple audio leaders, all of them receive the participant request, and the first to respond determines whether the request is accepted or declined. Other responses are ignored.

**To request presenter rights:**

- Click the **Request Promotion** button
- Right click your business card and select **Request to presenter**

If the moderator grants or revokes presenter rights, you will be notified via popup.
Demoting a presenter
As a moderator, you can demote a presenter at any time during a meeting. Demoting a presenter removes their presenter privileges, including audio controls and application sharing.

Presenters can also self-demote by clicking the Demote button on their business card, or selecting Demote to participant in their business card menu. You will be notified via popup if a presenter demotes themselves.

To demote a presenter

- Either click on the demote button on the business card; or,
- Open the participant’s context menu and select Demote to participant.

The presenter will be notified that they have been demoted.

Self-demoting

As a presenter, you can self-demote by clicking the Demote button on your business card, or selecting Demote to participant from your business card menu.

Demoting to a participant will restrict your access to in-meeting audio controls, poll creation, and application sharing.
Recording a Meeting

Recording a meeting
Meetings can be recorded and archived for future reference. Recorded meetings are listed in the Recordings section of Conference Manager.
Depending on your account type, charges may be incurred for recording a meeting.

To record a meeting archive

1. Click the Record button to open the Recording menu
2. In the *Enter recording name... field, enter a name for the archive
3. Select Voice and/or Web to specify what you would like to record
   - Voice records only the audio portion of the meeting
   - Web records only the Web portion of the meeting, including Share presentations
4. To begin recording, click Record
5. To cancel, click the x button
Recording controls
When a meeting begins recording, the recording control panel expands above the participant list.

The panel displays the name of the recording and the recording progress. If the recording fails or is otherwise terminated unexpectedly, you will be notified via popup and the control panel will display a Recording Error message.

Clicking the Stop button prompts you to choose to stop the meeting or disregard and continue recording.

To end a recording

1. Click the Stop button
   - Select Stop Recording to end the recording
   - Select Continue Recording to resume recording
Delivery options
When you select to end the recording, the archive delivery menu opens automatically.

From the archive delivery menu you can select your delivery option(s) and order or discard the recorded archive.

Delivery options

- **Download as Zip file**
  Download the meeting archive in a compressed .zip file.

- **Host on secure server**
  Host the meeting archive on a secure server. The hosted archive will automatically renew according to your account settings and can be deleted at any time. If electing to host on a secure server, you have the option of setting a password to restrict access to the recorded archive.

To order an archive

1. Select your delivery option
   Enter an access password (optional)
2. Click Order.

To discard a meeting recording

1. Click Discard.
2. At the confirmation prompt, select **Yes** to discard the recording or **Cancel** to return to the delivery menu.
Locking and unlocking a meeting

Meetings can be locked or unlocked at any time.

If participants attempt to join a locked meeting, they will be sent to the Waiting Room by default. When a user enters the Waiting Room, the tab will update with the current number of users waiting to join. You will also be notified with a popup that allows you to immediately accept or reject the connecting user.

To admit them into the meeting, either unlock the meeting, or click **Open Door** under the Waiting Room tab.

- To lock a meeting, click the **Lock** button in the titlebar.
- To unlock a meeting, click the **Unlock** button in the titlebar.

From the information tab, you can also set the message that displays to participants in the waiting room.