

Colt Conferencing User Guide

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1 Overview

Colt Conferencing is your perfect everyday business conferencing tool. Our award-winning technology integrates fully-automated voice conferencing with easy-to-use web conferencing and desktop video, turning your PC into a universal communications tool. Reliable and secure, you can present PowerPoint slides, share applications, quiz and survey participants, lead a web tour, all with the same impact and results as in-person meetings. So you meet more productively and more often without the time and expense of travel.

Use Colt Conferencing for:

- Sales Presentations
- Training and e-Learning Programs
- Marketing Seminars
- Company Announcements
- Collaboration and Project Management

2 Tips for a successful meeting

The following are some helpful hints for conducting an efficient and productive Colt Conferencing conference.

- Prepare in advance. To avoid meeting delays, take time before the conference to create and upload any resources you'll need for your meeting, such as presentations, surveys or quizzes.
- Enter the meeting early to ensure participants can access your meeting at the scheduled start time. Give yourself a few minutes to open the meeting room and make sure all necessary system components are loaded.
- When speaking, talk directly into either a headset or telephone receiver for optimal clarity.
- Mute all participants in non-collaborative meetings to minimize background noise.
- For optimal application sharing performance, keep the number of open windows to a minimum.
- Prior to the meeting, all participants should perform a browser test included in the meeting invitation to ensure their browsers and operating systems are compatible and that there are no firewall issues.
- Be sure participants download the Meeting Centre Application prior to your meeting if they wish to use certain features such as Presenter capabilities and/or Video access.

Note: Your participants are not required to download the application to join your meeting.

3 Steps to start

Now you can visualise your audio conference on your PC screen and manage your call with a simple “point” and “click”. These steps will guide you through the set up and progress of your meeting.

New users: To start using Colt Conferencing you need to [open an account with Colt](#)

Note: Participants do not need to have an account with Colt to join a Colt Conference.

3.1 Moderators

3.1.1 Install the software – Full Moderator Tools

- If you have administrator rights on your computer [click here](#) to download the moderator software (this will allow you to use all features of the service).
- If you do not have administrator rights contact your IT department with the below download link for installation:
http://content101.mc.iconf.net/gcc_installer/install.asp?ba=300000066&type=2
- Click **Download**.
- Once the download prompt appears, click **Run**, then click **Next** on the subsequent screen prompts.
- Select **I accept the terms in the license agreement** and click **Next**.
- Enter your Meeting Number and PIN (* are not required) in the fields shown. Check the box if you want to use the Outlook Calendar tool (if you have Outlook installed already) and click **Next**.

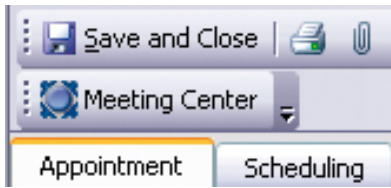
3.2 Browser Moderator

- If you do not install the Moderator software, you can launch browser-only meetings to manage your audio participants online. You can utilise features such as mute, dial me, chat and open/close meeting room door. You will not be able to use collaborative features such as presentation slide show, application sharing, surveys, etc.
- Supported browsers and operating systems for Browser Moderator include: IE 6.0+ (Windows), Firefox 2.0+ + (Windows/Mac/Linux), Safari 2.0+ (Mac).

3.2.1 Schedule and start meetings

Using Microsoft Outlook:

- Open an appointment time in your Outlook Calendar, then click the **Meeting Center** tab. The meeting access information will appear in the body of the appointment so all you need to do is add participants and send.



- To start the meeting click on the link to **join** in the meeting invite and the system will recognise that you are the moderator.
- Conferencing will prompt Moderators and Participants to enter their telephone numbers to be automatically dialled or choose to dial into the meeting.
- Conferencing then dials out to both moderators and participants to begin the meeting if the Dial Me Now option is selected.



3.2.2 Using the Internet:

- Log-in to the Colt Conferencing website www.coltconferencing.co.uk
- Enter your meeting number and password
Note: *If you do not have a meeting number and PIN [contact Colt](#)*
- Click on "Schedule a Meeting" and follow the steps to send out an email invitation to your participants.
Note: *It is not necessary to set up a meeting in advance. You may also start a meeting immediately using the 'Start' button next to 'Ad Hoc Meeting' on the left hand side menu.*
- To start the meeting click on the 'Start' button next to your scheduled meeting.
- Conferencing will prompt Moderators and Participants to enter their telephone numbers to be automatically dialled or choose to dial into the meeting.
- Conferencing then dials out to both moderators and participants to begin the meeting if the Dial Me Now option is selected.



3.3 Participants

3.3.1 Join a meeting with Colt Conferencing

- If you have received an e-mail invitation, click on the link provided in the invitation.
- Alternatively [log in to the Colt Conferencing website here](#).
- Enter the meeting number provided by the moderator. Click on "Join Meeting as Participant". Enter name.

4 Installing Colt Conferencing

4.1 Downloading Colt Conferencing

When you start a meeting, the component updater detects if you are using an older version of Colt Conferencing and asks if you would like to download the updates. It presents you with the option of downloading and installing these components at that time.

This page provides a link to download the latest version of Conferencing.



Figure 1: Installing Conferencing

The application does not require JavaVM or additional plug-ins.

Participants are able to join meetings using Internet Explorer 6.0 + (Windows),

Mozilla Firefox 1.5 + (Windows/Mac/Linux) or Safari 2.0 + (Macintosh).

Note: In order to install the latest application, you must have administrative rights on your computer.

4.1.1 Which version?

Colt Conferencing offers two meeting platform options:

NEW! Conferencing 4.0: This installed Windows-based application, which does not require JavaVM or additional plug-ins, offers more capabilities, ease of use, and expanded support for browsers and operating systems.

Meetings launch faster, functionality is vastly improved, and pop-up blockers no longer cause issues in meetings. Conferencing 4.0 provides an intuitive and customizable interface, slide previews for presentations, and improved annotation abilities.

Participants will be able to join meetings using Internet Explorer 6.0 + (Windows), Mozilla Firefox 1.5 + (Windows/Mac/Linux) or Safari 2.0 + (Macintosh).

Please note that in order to install the Conferencing 4.0 application, you must have administrative rights on your computer and be running Windows 2000 or XP and Microsoft Internet Explorer 5.5 or higher (with javascript and session cookies enabled). Also required is a 800MHz or equivalent computer with 96 MB of RAM (Note: Application Sharing requires 128 MB of RAM and requirements increase slightly depending on the number of participants). Internet connection should be a minimum of 56K for Application Sharing, 128K for broadcasting video. Contact your system administrator for more information.

Conferencing 3.9: This previously existing version requires both moderators and participants to have Internet Explorer version 5.0 or higher on Windows 2000 or XP and also requires JavaVM.

How to do this needs to be captured in this document.

4.1.2 Installing Colt Conferencing

1. Download Colt Conferencing by going to <http://www.genesys.com/go> and click **Get It Now**.
2. Click **Download**.
3. Once the download prompt appears, click **Run**, then click **Next** on the subsequent screen prompts.
4. Select **I accept the terms in the license agreement** and click **Next**.
5. Enter your Meeting Number and PIN (* are not required) in the fields shown.

6. Select the check box if you want to use the Outlook Calendar tool and click **Next**.

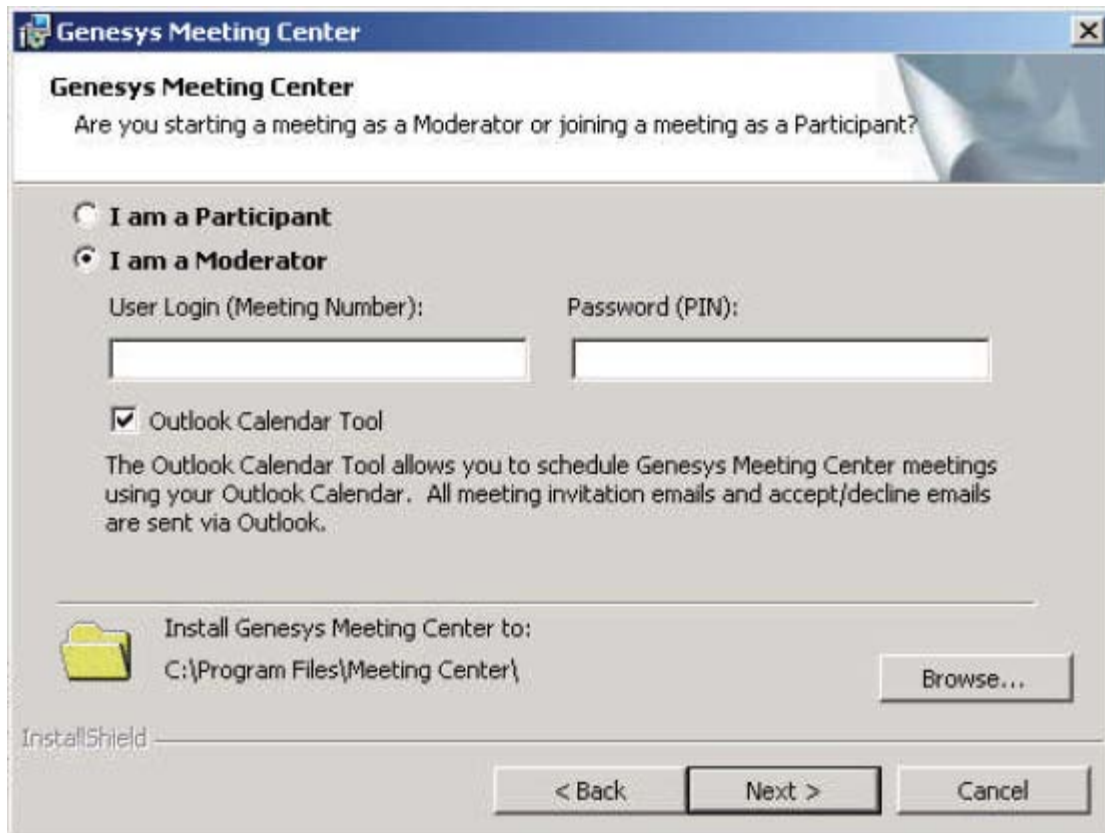



Figure 2: Installing Conferencing

7. Upon completion download, select the **Sign in to Genesys Meeting Center** check box and click **Finish**.



Figure 3: Signing in to Conferencing

8. Soon, you will see the Colt Conferencing desktop icon  in your system tray.

4.1.3 Browser Moderator

If you do not install the meeting application, you can launch browser-only meetings to manage your audio participants online.

You can utilize features such as mute, dial me, chat and open/close meeting room door.

You will not be able to use collaborative features such as presentation slide show, application sharing, surveys, etc.

Supported browsers and operating systems for Browser Moderator include: IE 6.0+ (Windows), Firefox 2.0+ + (Windows/Mac/Linux), Safari 2.0+ (Mac).

5 Before the meeting

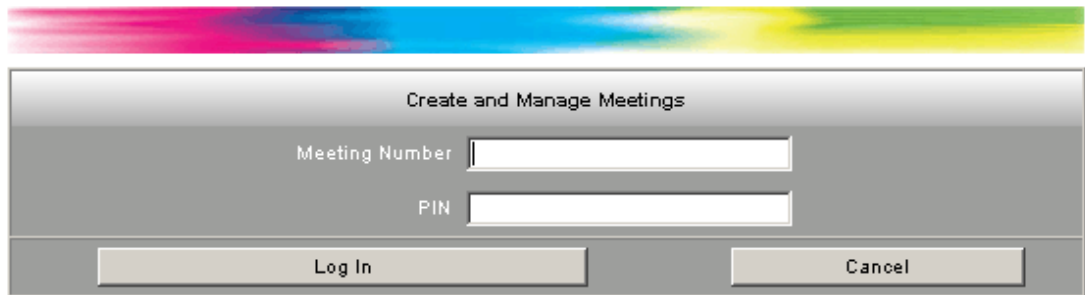
5.1 Logging in

1. Go to <http://www.coltconferencing.co.uk>.
2. Enter your meeting number and PIN in the Moderator Login region as shown in the following figure.

The image shows two login forms. The top form is titled 'Moderator Login' and contains two input fields: 'Meeting Number' and 'Pin', followed by a 'Login' button. The bottom form is titled 'Participant Login' and contains one input field: 'Meeting Number', followed by three buttons: 'Join Live Meeting', 'Join Meeting as presenter', and 'View List of Archives'.

Figure 4: Login region

3. In the Colt Meeting Centre Access dialog box, enter your meeting number and PIN again as shown in the following figure.



The dialog box is titled "Create and Manage Meetings". It features two input fields: "Meeting Number" and "PIN". Below these fields are two buttons: "Log In" and "Cancel". The dialog has a grey background with a white border.

[Join a Meeting](#)

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Figure 5: Colt Meeting Centre Access dialog box

The Welcome dialog box appears as shown in the following figure.



Figure 6: Welcome dialog box

5.2 Setting up for instant message integration

Quickly invite participants to your meeting using instant messenger. Colt Conferencing is fully integrated with a variety of instant messaging programs.


1. After you have installed Colt Conferencing, click the desktop icon  in your taskbar and select Start Meeting.



Figure 7: Setting up instant message integration

2. Click the Meeting drop down menu and select **Meeting Options**.

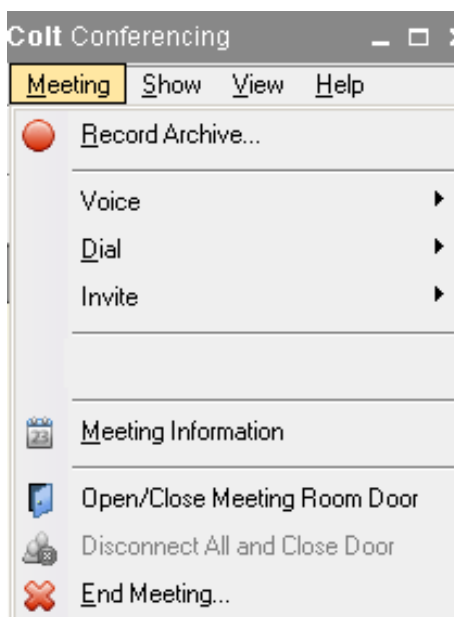


Figure 8: Setting up the meeting options

3. Click **Instant Messenger**, and then select corresponding check boxes to integrate with Windows Live Messenger and/or Microsoft Office Communicator.

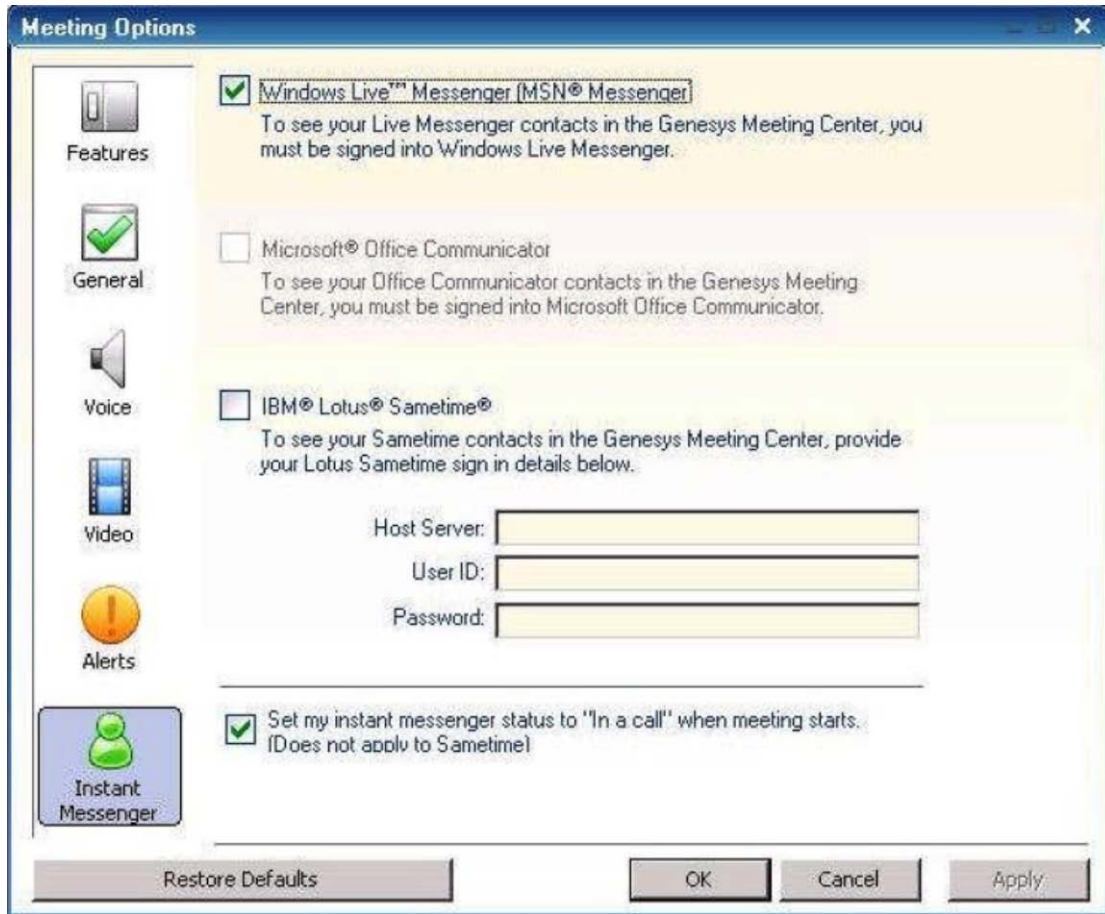


Figure 9: Integrating with Windows Live Messenger and/or Microsoft Office Communicator

4. To integrate with Lotus Sametime, select the corresponding check box and enter your host name, communication port, user ID and password. Click **OK** to save the setting.



Figure 10: Integrating with Lotus Sametime

Note: Your instant messenger program must be running while performing the instructions above and to send invitations to your Colt Conferencing participants.

5.3 Configuring preferences

1. Log in to Conferencing as described in [Logging In](#).
2. In the Setup area, click **Preferences** to configure options for the Conference Manager

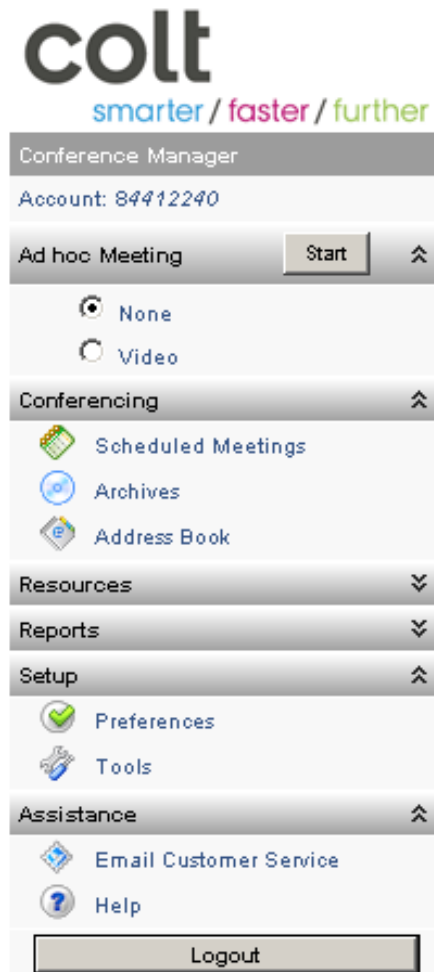


Figure 11: Preferences

3. The Preferences dialog box appears as shown in the following figure.

Figure 12: Setting preferences

4. Enter details in the Personal Account Information tab to enter personal information required to run a meeting as follows:
 - First and last names, as well as the name you want to display during meetings
 - Email address
 - Country
 - Telephone numbers (at least one must be entered - if multiple numbers are entered, click to select your primary number which the meeting will use to dial out to you)
 - Time zone
5. Enter details in the General tab to set specific accessibility options for your meeting:
 - Restrict Video broadcasting.
 - You can also control dial out options for the Moderator and Participants:
 - **Allow dial out to Moderator upon web meeting entry** - Allows you to be dialled by the teleconferencing service when the meeting starts. After you check this option, you are asked to type in your telephone number.
 - **Allow Participants to dial out to themselves upon web meeting entry** - To provide participants with an option to be automatically called when joining the meeting, check this option. When you enable this option, participants are provided with the following options on their second login screens:
 - a Dial Me Now option and prompt for entering their telephone numbers

- an option for selecting their telephone Country Code
6. Enter details in the Meeting Security tab to enhance security for our meeting as follows:
 - **Participant Identification** - when participants enter a meeting they receive a 5-digit personal security code, and are asked to enter it using their telephone keypads. This code merges their web and audio presence. When entered successfully, the synchronized participant's name appears on the Participant's List with web and audio symbols merged on one line. If a participant does not synchronize, the participant list will show presence for telephone and a separate presence for web connection
 - **Enable Secure Data Transmission (SSL)** - applies SSL to your meeting to securely transmit your chat, display presentation slides and other information during your meeting

6 Creating an ad hoc meeting

1. In the Ad hoc Meeting region, select the **Video** radio button if you want to stream video; otherwise, select **None**.
2. Click **Start**. Meeting Centre launches.

7 Creating a scheduled meeting

1. In the Conferencing region, click **Schedule a Meeting**. The Schedule a Meeting wizard appears as shown in the following figure.

Figure 13: Schedule a Meeting wizard

2. Follow the instructions in the next sections to complete the wizard.

7.1 Date and duration

1. In the **Meeting Topic** field, enter a topic or name for your meeting.
Tip: Always try to enter a topic for your meeting. This will help you track your meetings when using the Reports function in the Colt Conferencing Centre.
2. Enter, date, time and approximate duration for your meeting.
3. Click **Recurrence** to set up a recurring meeting. The Recurrence Pattern dialog box appears. Enter the appropriate values and click **Set Recurrence**.
4. Select a value for the **Meeting Type** field.
5. Click **Next** to select the Participants tab.

7.2 Participants

1. In the **Select Names** section, click the list of values and select an available address book.
2. Highlight a contact name.
3. Click the **Add>>** button to add the name to the **Participants list**.
4. Click **Next** to select the Invitations tab.

7.3 Invitations

1. If you want to include a personalized message with the meeting invitations, type it in the **Agenda** field.
2. From the **Choose language for default invitation** field, select the language in which you want the invitations to be sent.
3. Click the **Preview Invitation** button to see how the invitation will look.
4. Select the **Email Reminders** you would like to send out to participants before the meeting and the length of time before the meeting to send them. You can choose one or two reminders (or none). A link to join the web portion of the meeting will be sent to participants and/or phone connection information.
5. The **Include calendar link attachment with invitation** option sends the invitation with an attachment that can be clicked to save the meeting into the recipient's calendar. Directions for saving this attachment will be included in the invitation. As a moderator, you will also receive an email with this attachment because it must also be added to your calendar.
6. Select **Meeting Registration** options. If your company has a public calendar, you may have the option to display your meeting in it.
7. Optionally, if the **Ask Participants to Accept or Decline Invitation** radio button is selected, you can send a survey or quiz with the invitation. Click **Create Survey** to create a survey or click **Create Quiz** to create a quiz.
8. Click **Next** to select the Security tab.

7.4 Security

Security options chosen in this tab override any security options you have chosen in the Preferences section for this meeting only.

1. For participants joining the web portion of the meeting and also using telephone to connect to the voice portion, a **Participant Identification** number can be provided to them in order to synchronize their web and audio presence in the moderator's participant list. Each participant will be prompted after dialling into the meeting to use his or her unique ID to synchronize.
2. Industry standard Secure Sockets Layer (SSL) encryption can be enabled for a meeting to transmit content securely. To do this, select the **Enable Secure Data Transmission** check box.
3. A **Web Room Password** can be added to give extra security to your meeting. This password will be sent to participants in the invitations and must be entered when a participant is signing in to a meeting.
4. Click **Next** to select the Resources tab.

7.5 Resources

1. In the Optional Media region, add voice streaming or video to enhance your meeting. Choose your source from the list of values.
2. In the Images region, choose a previously uploaded image or to upload a new image to add your logo or a photo (for example of yourself or a presenter) at the top of the control panel on the Conferencing desktop. From within a meeting, you can use Meeting Options to choose whether to display the image in the Moderator and/or Presenter or Participant interface.
3. In the Surveys/Quizzes region, create surveys and/or quizzes to launch upon your participants' entry to or exit of your meeting. You can still send surveys and quizzes during your meeting.
4. Click **Finish** to set up the meeting.

8 Uploading and creating meeting materials

There are some items that you may want to prepare in advance of your meeting, such as uploading presentations, creating surveys, polls, web tours and your file transfer database.

1. To prepare these items, click the type of resource that you want to upload in the **Resources** region as shown in the following figure.

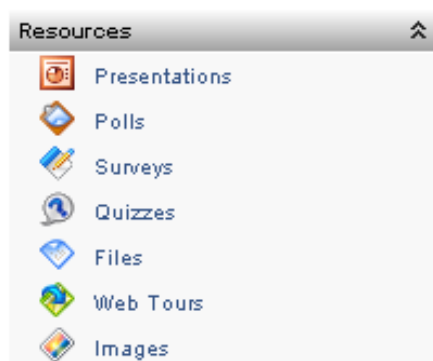


Figure 14: Resources region

8.1 Presentations

1. To upload a presentation to be used in your meeting, click **Presentations**.
2. Click **Upload a Presentation**. Enter details about the presentation as shown in the following dialog box.

Presentation Name:

Description:

Presentation File:

Screen Resolutions:

Convert slides to images (no animation)
Use this option if your presentation is Unicode or if you have PowerPoint 2007® installed.

i Multiple resolutions will be uploaded by default which allows for automatic scaling of your presentation. Select a single resolution to help increase upload speed.
NOTE: Upload times vary based on the speed and strength of your Internet connection, file size and the number of resolutions you choose. 1024 X 768 is the most common resolution.

Figure 15: Uploading presentations

Tip: Installing the Enhanced Publisher on your computer will optimise the uploading process.

3. Click **Upload Presentation**.

8.2 Polls

Note: Polls must be created in advance of your live meeting.

1. To create a poll to be used in your meeting, click **Polls**.
2. Click **Create New Poll**. The following dialog box appears.

Enter Question:

Enter Response:

Responses:

Figure 16: Creating a poll

3. Enter a question.
4. Enter your first response choice.
5. Click the **Add** button.
6. Add additional responses as necessary.
7. To delete a response, select it from the Answers box and click the **Delete** button.
8. To preview a poll, click the **Preview** button.
9. When you finish entering responses, click the **Save Poll** button. The poll is saved to the poll list, which you can access during the meeting.

8.3 Surveys

Note: Surveys must be created in advance of your live meeting.

1. To create a survey, click **Surveys**.
2. Click **Create New Survey**. The following dialog box appears.

The dialog box for creating a survey is structured as follows:

- Survey Name:** A text input field.
- Description:** A text input field with a scroll bar.
- Enter Question:** A text input field.
- Questions:** A large empty list area.
- Buttons:** 'Add', 'Delete', 'Move Up', and 'Move Down' buttons are positioned to the right of the 'Enter Question' and 'Questions' fields.
- Question Type:** A dropdown menu below the 'Questions' list.
- Enter Response:** A text input field.
- Responses:** A large empty list area.
- Buttons:** 'Add', 'Delete', 'Move Up', and 'Move Down' buttons are positioned to the right of the 'Enter Response' and 'Responses' fields.
- Footer Buttons:** 'Preview', 'Save', and 'Cancel' buttons are located at the bottom center of the dialog.

Figure 17: Creating a survey

3. Enter the **Survey Name** and a short **Description**.
4. Create a question in the **Enter Question** field and click the first **Add** button.

5. Highlight the question you created, and select a format option from the **Question Type** list of values.
6. Keep the question highlighted, and create a response in the **Enter Response** field. Click the second **Add** button.
7. Create additional responses if desired.
8. Create additional questions if desired.
9. Use the **Move Up**, **Move Down**, or **Delete** buttons to change the order in which the options appear.
10. Click the **Preview** button to see how the Survey will appear to participants.
11. Click **Save** when finished.

8.4 Quizzes

Note: Quizzes must be created in advance of your live meeting.

1. To create a quiz, click **Quizzes**.
2. Click **Create New Quiz**. The following dialog box appears.

Quiz Name:

Description:

Scoring: Total Score:

Passing Score:

Show score to user after completion

Enter Question:

Questions:

Question Type:

Enter Response:

Response Score:

Responses:

Figure 18: Creating a quiz

3. Create a title in the **Quiz Name** field.
4. Provide a sentence to describe the quiz's purpose in the **Description** field.
5. Provide scoring details by selecting the right most radio button of the **Total Score** line and enter a total in the adjacent field.
6. Provide the minimum score required to pass the quiz in the **Passing Score** field.
7. Enable the **Show score to user after completion** check box if you intend to share quiz results to the participant after completion; otherwise, leave the checkbox blank.
8. Provide a question in the **Enter Question** field.
9. Click the **Add** button to add the question to the survey.

10. Highlight the question in the **Questions** field and select a **Question Type** from the list of values.
11. While keeping the question highlighted, create its answer in the **Enter Response** field.
12. Provide the score value for the answer in the **Response Score** field and click **Add**.
13. Create additional responses to the question as necessary.
14. Create additional questions as necessary.
15. Click the **Preview** button to see how the quiz will appear to participants.
16. Click **Save** to finish.

8.5 Files

1. To upload a file to be used in your meeting, click **Files**.
2. Click **Upload File**. The following dialog box appears.

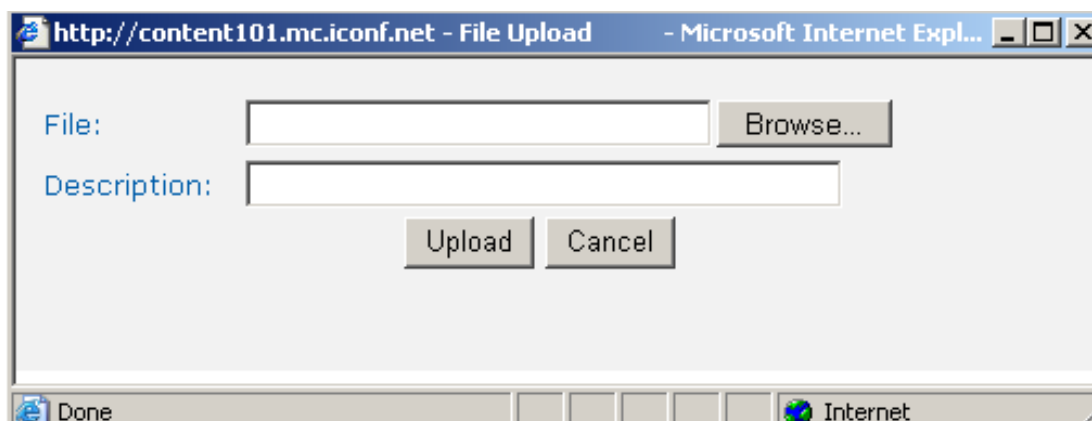


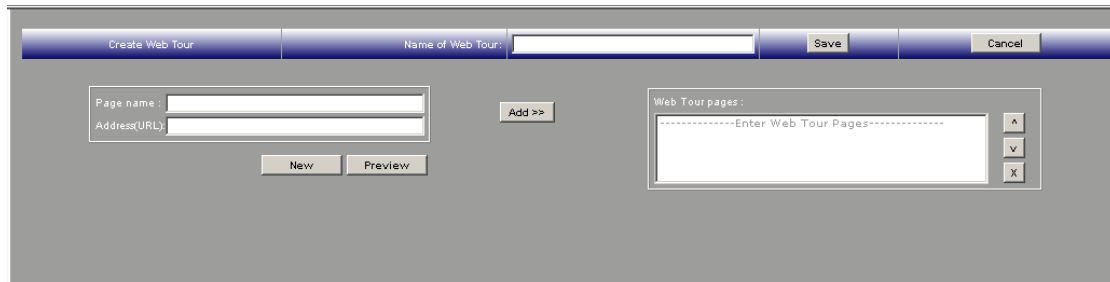
Figure 19: Uploading a file

3. Browse for the file you want to upload into the list. **Note:** Please be aware that .exe files cannot be transferred.
4. Enter a brief description of the file.
5. Click **Upload**.
Note: Please do not refresh this page while the file is uploading. Interrupting this process may result in an unusable file.
6. When the file is uploaded it appears in the Files List. Select the check box next to the filename listed in the Shared Files List. The file is now available to your meeting's participants.

8.6 Web tours

Note: Creating a web tour in advance is not necessary, but it is recommended to streamline your meeting.

1. To create a web tour, click **Web Tours**.
2. Click **Create New Web Tour**. The following dialog box appears.



Create a Web Tour

1. Enter a URL in the address field above and Press *Preview* to preview the Web Page.
2. If you are satisfied with the page, enter a *friendly* name for the page.
3. Click *Add* to add the page to your web tour.
4. Choose a name for your Web Tour and click *Save*.

Some Web Pages are not supported by Web Tour

- Pages that try to load themselves into the top frame window of the Browser.
- Hyperlinks that try to load a new Web Page into a Sub Frame of the Web Tour Page.
- Hyperlinks that try to load a new Web Page into a New Browser Window.

Figure 20: Creating a Web tour

3. Type in a **Name of Web Tour**. Begin adding URLs of web pages that you would like to tour.
4. Click the **Add** button to add each one to your Web Tour pages list. Press the **Preview** button to view a web page before adding it to the Web Tour.
5. Click the **Save** button beside the **Name of Web Tour** field to save the Web Tour.

8.7 Images

For best results, your images should be a maximum size of 225 x 150 pixels. If an image exceeds this size, it will be compressed to fit the space. The following graphic formats are supported: .jpg, .gif and .png.

1. To upload an image, click **Image**.
2. Click **Upload Image**. The following dialog box appears.

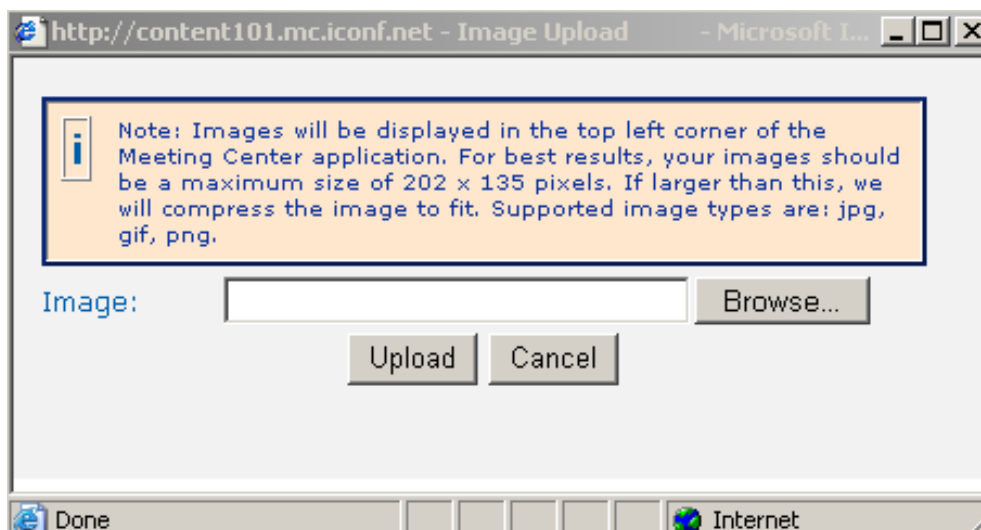


Figure 21: Uploading an image

3. Browse for the image file for the image you wish to upload.
4. Click the **Upload** button.

9 During the Meeting

9.1 Starting a meeting

9.1.1 Ad hoc meetings

To start an ad hoc meeting:

1. Go to <http://www.coltconferencing.co.uk>.
2. Enter your meeting number and PIN in the Moderator Login region.
3. In the Colt Meeting Centre Access dialog box, enter your meeting number and PIN again. The Welcome dialog box appears as shown in the following figure.
3. In the Ad hoc Meeting region, select the **Streaming Voice** radio button if you want to allow participants to listen to audio over the Internet; otherwise, select **None**.

Note: Starting an Ad Hoc Meeting with the **Video** option selected will launch Conferencing with controls available to broadcast live video to meeting participants. You will need to have a webcam connected to your computer in order to use this feature.

4. Click **Start** to launch a meeting.

9.1.2 Scheduled meetings

To start a scheduled meeting:

1. Go to <http://www.coltconferencing.co.uk>.
2. Enter your meeting number and PIN in the Moderator Login region.
3. In the Colt Meeting Centre Access dialog box, enter your meeting number and PIN again. The Welcome dialog box appears as shown in the following figure.
3. In the Conferencing region, click **Scheduled Meetings**. The right pane refreshes with a list of all scheduled meetings.
4. Click **Start** next to the meeting that you want to launch.

9.1.3 Through Microsoft Outlook

1. From Outlook Calendar, double-click the appointment time or select the Meeting Center folder.



Figure 22: Microsoft Outlook

2. Enter the meeting topic in the Subject line, and click the **Meeting Center** button.
3. Click the Scheduling tab/icon, invite participants as you normally do, and send.
4. To join the meeting, the Moderator and Participants click the respective link in the meeting invite.
5. Colt Conferencing will prompt moderators and participants to enter their telephone numbers to be automatically dialed or choose to dial into the meeting.
6. Colt Conferencing then dials out to both the moderator and participants to begin the meeting if the Dial Me Now option is selected.

Note: If you do not install the Outlook or Lotus Notes Calendar tools, click the Colt Conferencing icon in your taskbar and select **Schedule a Meeting**. Follow the steps through the scheduling wizard.

9.1.4 Through Lotus Notes

1. From Lotus Notes Calendar, open the appointment time.
2. Enter the meeting topic in the Subject line Install Meeting Center and click the **Conferencing Meeting Center** button.
3. Invite participants as you normally do, and click the **Save and Send Invitations** button.

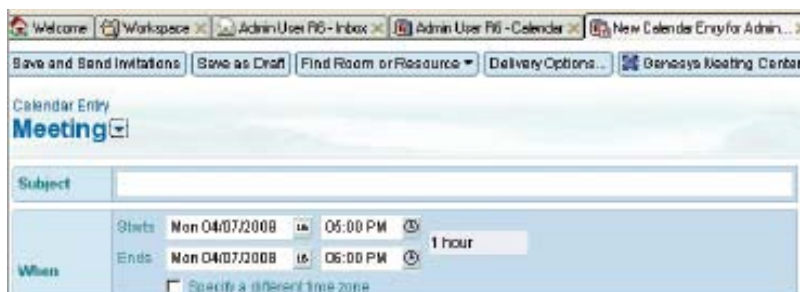


Figure 23: Lotus Notes

4. Your Lotus meeting invite will be automatically populated with meeting access links for the Moderator and Participants.

5. To join the meeting, the Moderator and Participants click the respective link in the meeting invitation.
6. Colt Conferencing will prompt moderators and participants to enter their telephone numbers to be automatically dialed or choose to dial into the meeting.
7. Colt Conferencing then dials out to both the moderator and participants to begin the meeting if the Dial Me Now option is selected.

10 Starting a scheduled meeting

Moderator:

1. Open the scheduled meeting in your Outlook or Lotus Notes Calendar.
2. Click the "JOIN meeting" link.
3. Select how you would like to join the voice portion of your meeting in the first Quick Start menu and click **Next**.
4. Select what you would like to do first when your meeting begins (i.e. Show Presentation, Share Application, etc.) in the second Quick Start menu and click **Finish**.

Note: If you have not installed the Outlook or Lotus Notes Calendar tools, click the desktop icon in your taskbar and select Start Meeting. Click on the specific scheduled meeting link.

11 Starting an ad hoc meeting

1. Click the desktop icon in your taskbar and select **Start a Meeting**.
2. Select how you would like to join the voice portion of your meeting in the first Quick Start menu and click **Next**.
3. Select what you would like to do first when your meeting starts (i.e. Show Presentation, Share Application, etc.) in the second Quick Start menu and click **Finish**.

Participants Access:

1. If the meeting was scheduled in advance, participants click on the link provided in the email invitation to join.
2. For instant (Ad Hoc) meetings, participants go to www.genesys.com and click **Participant**. Participants will be prompted to type in your Meeting Number and their names.

Note: Moderators can also send a Quick Invite via Instant Messenger or email using the Quick Invite in-meeting shortcut toolbar. Participants simply click on the link to join the meeting.

3. Participants will be asked how they wish to access the voice portion of your meeting and prompted to identify themselves if they choose the options **Already Dialed In** or **Dial In Now**.

Note: Web conference room door remains closed and participants are sent to the waiting room until the moderator starts the voice portion of the call or opens the web door.

12 Conferencing Desktop Icon

The Conferencing Desktop Icon is automatically populated to your taskbar when you install the Conferencing Application.



Figure 24: Conferencing Desktop Icon

This user-friendly tool can be used for:

- Click access to scheduled or Ad Hoc meetings
- Scheduling meetings
- Joining meetings
- Access to your Conference Manager (online Conferencing account)

13 Dialing out to participants

1. Click on the **Dial Out** button in the shortcut toolbar.
2. Enter the name and number of the person to call or click the **Address Book** button and select the previously stored contact from your Address Book.
3. Click **Dial**.

14 Additional security / closing the door to the meeting

The moderator can screen participants via the waiting room then provide them access to the meeting one at a time.

1. From the Participants panel, check/uncheck **Close meeting room door** to close and open the meeting to attendees.

Note: By default the door to the meeting is closed.

15 Connection status

The moderator can see how participants are connected to the meeting by viewing the

Status column in the Participants panel.





Status types include:

- Phone
- Web
- Phone/Web
- Streaming/Web



Note: Sort participants by Name, Emoticon or Status in the Participants panel by clicking on the specific column header.



16 Voice status icons

The moderator can always see the voice status of the participants in the Participants panel.

Icon	Description
	<p>Standard voice icon</p> <p>The participant (or moderator) is currently in the main voice meeting room.</p>
	<p>Active speaker icon</p> <p>The participant (or moderator) is currently speaking, or it may indicate background noise coming from this line.</p>
	<p>Muted line icon</p> <p>Participants cannot be heard when their lines are muted. In Group Mute mode, participants have the ability to unmute themselves.</p>
	<p>Lecture Mute icon</p> <p>Participants cannot be heard when their lines are muted and do not have the ability to unmute themselves.</p>

17 Muting/unmuting participants

1. Click on the **Voice** icon  next to the participant's name to mute or unmute that participant.
2. You can also mute or un-mute all participants at once by clicking the **Mute/Unmute All** button in the shortcut menu.
3. Click the **Lecture Mute All** icon  to mute all participants. If you click this icon, participants cannot unmute themselves.

4. Click the **Q&A Mute All**  icon to inform your participants that their lines have been muted. Instruct your participants to hit the * key to indicate that they would like ask a question. Click the raised hand  to give the floor to the participant.

18 Controlling entry and exit notifications

1. Click **Notifications** at the top of the meeting interface to control participant entry and exit notifications for your current meeting.
2. Choose from **Tones**, **Names** or **Nothing**.

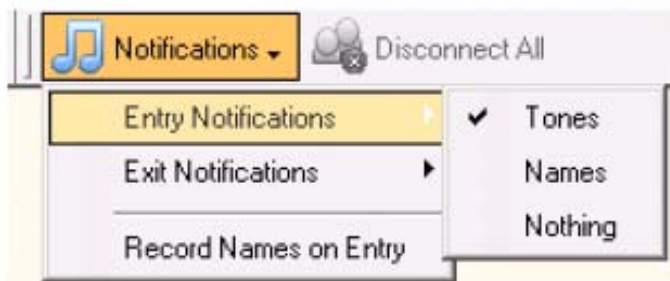




Figure 25: Controlling entry and exit notifications

Note: To change notification settings for all meetings, click the Voice icon from the Meeting/Meeting Options menu.

19 Initiating Q&A

The moderator can initiate a Q&A session where participants request the right to speak by using their touchtone telephones.

1. Click on the Meeting menu at the top of the interface.
2. Select **Voice** and then **Voice Q&A** . Your participants will be informed that their lines have been muted.
3. Instruct your participants to hit the * key to indicate that they would like ask a question.
4. Click on the raised hand  in order to give the floor to the participant.

Note: The first participant in line will have a highlighted hand icon.

20 Contacting technical support

1. Click on the Help menu and select **Dial Customer Support**.

21 Showing a presentation

The moderator can easily show a PowerPoint presentation to participants.

21.1 Before the meeting

1. In your Conference Manager, under Resources, select **Presentations**.
2. Click **Upload a Presentation**.
3. Name the presentation, browse to select the presentation you want to upload and click the **Upload Presentation** button.

Note: You can also Upload a Presentation from within a Conferencing web meeting. In the Show panel, select Presentation, click **Browse** to select your presentation and click **Upload**.

21.2 During your meeting

1. In the Show panel, select **Presentation** and choose your presentation from the pull-down menu. It will load automatically.
2. Click on the slide preview “thumbnails” or the forward and back buttons to navigate through your presentation.
3. Click on the slide being displayed to proceed to the next slide.

22 Sharing an application

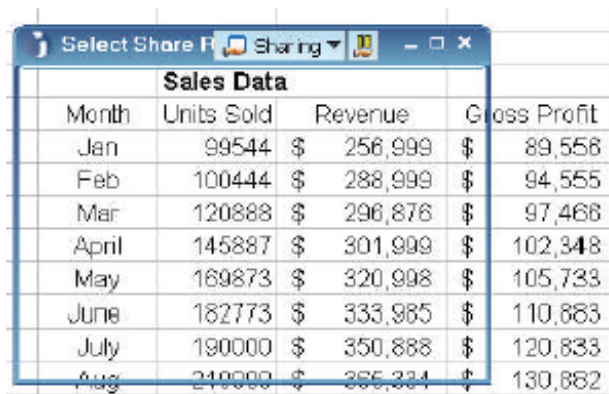
1. In the Show panel, select **File or Application** and choose the application(s) you would like to show to participants. Check the application(s) to begin sharing.
2. Alternatively, click **Entire Desktop** to share all applications open on your computer.

Note: You can click on the shared application to hide the moderator control panel. Simply click the Meeting Centre tab on the right-hand side of your screen for the control panel to reappear on top of the application.

22.1 Region sharing

1. Share a specific region of a file or application from your desktop.
2. In the Show panel, select **Region**. A small window will appear.
3. Scroll over the specific section of the file or application you would like to share to the audience.
4. Select **Start Sharing** from the drop down menu to begin sharing.
5. To exit Region Share, click the X on the top right corner of the window.

6. The Welcome Screen will now be displayed.



Sales Data			
Month	Units Sold	Revenue	Gross Profit
Jan	99544	\$ 256,999	\$ 89,558
Feb	100444	\$ 288,999	\$ 94,555
Mar	120888	\$ 296,876	\$ 97,466
April	145887	\$ 301,999	\$ 102,348
May	169873	\$ 320,998	\$ 105,733
June	182773	\$ 333,985	\$ 110,883
July	190000	\$ 350,888	\$ 120,833
Aug	210000	\$ 365,334	\$ 130,882

Figure 26: Sharing a region

22.2 Pausing application sharing

Moderators and Presenters can pause an application from being shared to the audience. Once paused, anything the moderator/presenter does on his desktop will not be seen by participants until sharing is continued.

To pause a shared application:

1. Click **Pause** next to **Sharing** at the top right corner of the screen.
2. The icon will flash and **Sharing** will change to **Sharing –Paused**.

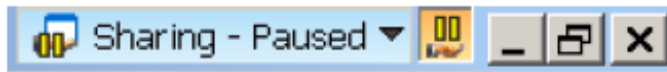


Figure 27: Pausing application sharing

To continue sharing:

1. Click **Pause** again. **Sharing –Paused** will change back to **Sharing**, indicating that the application is no longer paused.

23 Granting control to participants

Participants can be granted control to manipulate an application the moderator is sharing from their computer. This does not promote them to a presenter role, but allows them to edit the moderator's shared application.

To grant control to a participant:

1. Right-click the name of the participant you wish to grant control.
2. Select **Grant Control of Desktop / Application**.
3. The participant will receive a notification to take control by clicking her mouse.
4. To revoke control from a participant at any time, simply click your mouse.

24 Promoting participants to presenter

Participants can be promoted to a Presenter during a meeting so they can share content from their own computers and push slides in Presentation mode.

To promote a participant to Presenter:

1. Right-click the name of the participant you wish to promote.
2. Select **Promote to Presenter**.
3. The participant will receive a notification that he has been promoted to the role of Presenter.



Figure 28: Promoting participants to presenter

To revoke control and demote a Presenter to participant, simply right click the participant's name and select **Demote to Participant**.

Note: Participants must install the Colt Conferencing application in order to be promoted to Presenter.

25 Surveys, quizzes and polls

1. In Conference Manager, find **Surveys, Quizzes and Polls** under Resources.
2. Click **Create New Survey [Quiz/Poll]** and make your selections.
3. During a meeting, click on the Meeting Menu at the top of the interface. Select **Meeting Options**, check **Display Survey-Quiz-Poll** and click **OK**. The Survey-Quiz-Poll panel will appear in the meeting interface which allows you to display or upload your surveys/quizzes/polls.
4. After the meeting, review the results from the **Survey [Quiz] Summary** under Reports.

26 Desktop Video

Easily broadcast your webcam video from your desktop into your meeting.

1. Click the Meeting drop-down menu at the top of the meeting interface and select **Enable Desktop Video**.
2. Upon meeting start, click **Broadcast My Video**.
3. Select the video device in the drop-down menu and click **OK**.

27 Uploading a picture or other image to broadcast in a meeting

1. In the Conference Manager, go to Resources, then **Images**.
2. Click **Upload Image** and follow the upload wizard.
3. During the meeting, to display the image, click on the Meeting menu at the top of the interface. Select **Meeting Options**, check **Display Image**, select image from the pull-down and click **OK**. The image will be displayed in the top right corner of the meeting interface.

28 Broadcast live video of yourself and/or other meeting participants

1. During the meeting, click on the Meeting menu at the top of the interface and select **Enable Desktop Video**.

29 Archiving

1. Click on the Meeting menu and click **Record Archive**.
2. Name the archive, select **Voice and/or Web** and click **Record** (allow up to 30 seconds for the recording to start). The Archive panel will then appear in the meeting interface.
3. To stop the recording, click **Stop** in the Archive panel.
4. After the meeting you can find the Archive in the Conference Manager, under **Conferencing/Archives**.

Note: Additional charges will apply.

30 Desktop VoIP

Connect to the audio portion of an online meeting via Voice over IP. All you need is an Internet connection and headset with microphone connected to your computer.

1. To connect via Desktop VoIP upon joining a meeting, simply click **Connect via Desktop VoIP** in the first Quick Start menu.

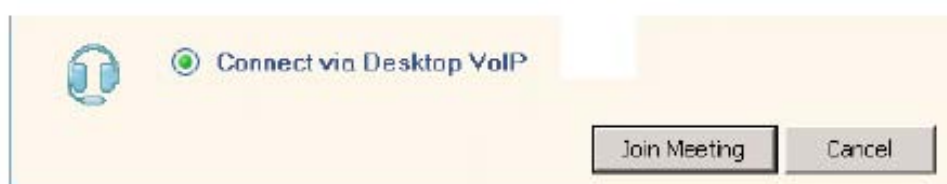


Figure 29: Connecting via Desktop VoIP

2. Easily toggle between telephone and Desktop VoIP connection during a meeting with the Voice Connection panel.

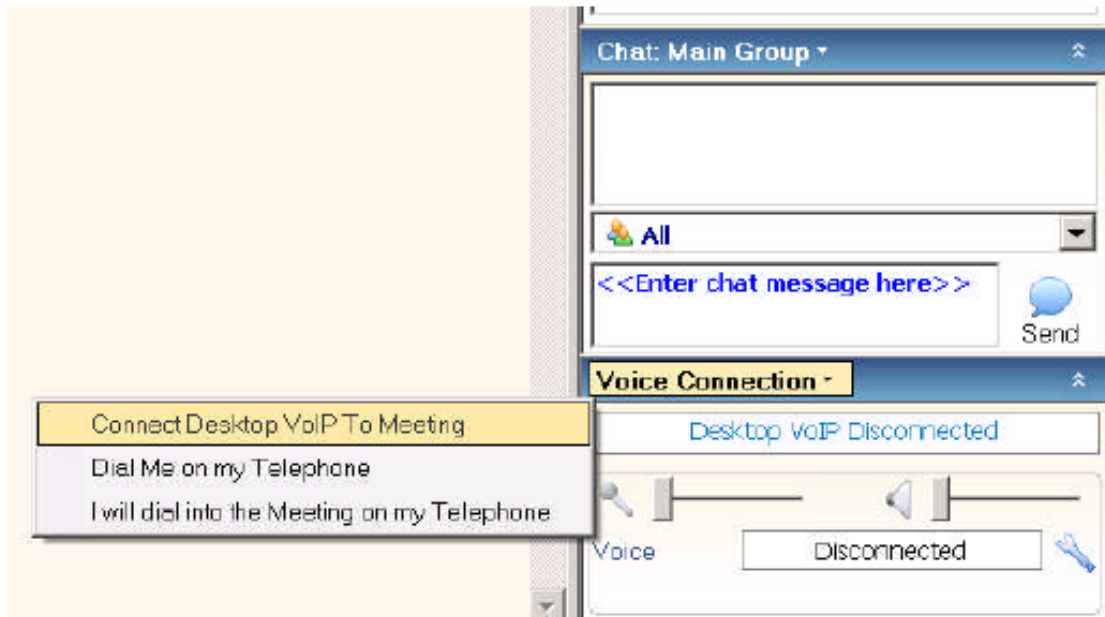


Figure 30: Toggling between telephone and Desktop VoIP

31 Reports

Conferencing stores detailed reports from scheduled and Ad hoc Meetings, with information on duration of the meeting, number of participants, participant name and/or telephone number, participant connection type (voice, web, streaming), who accepted and declined the invitation as well as Survey or Quiz results.

1. Click on the Reports tab in Conference Manager to access meeting reports.

32 After the meeting

32.1 Viewing meeting reports

32.1.1 Web Summary

The Web Summary report lists information on past meetings, upcoming meetings, and meetings in progress.

To view summary information:

1. In the left panel, expand the **Reports** section and then click **Web Summary**.
2. Use the list of values for the **From** and **To** fields to specify the date range of the report.
3. Click the **Go** button to display the summary.
4. To export the **Web Summary** to a file for Excel, click the **Export as CSV file** button.

32.1.2 Survey Summary

The Survey Summary shows you a summary of questions and responses for all surveys.

It enables you to sort and list survey responses by meeting, and then export the data into a file which you can open using Microsoft Excel.

To view the Survey Summary:

1. In the left panel, expand the Reports section and then click **Survey Summary**.
2. Select the survey you wish to view from the **Select Survey** list of values.
3. Select how meeting results should be displayed from the **Display Results** list of values.
4. Click the **Go** button to display the summary.
5. To export the **Survey Summary** to a file for Excel, click the **Export as CSV file** button.

32.1.3 Quiz Summary

The Quiz Summary shows you a list of questions and responses for all Quizzes. It enables you to break down quiz responses by meeting, then to export the file in a csv format and open it using Excel.

To view the Quiz Summary:

1. In the left panel, expand the Reports section and then click **Quiz Summary**.
2. From the **Select Quiz** list of values, select the specific quiz to display.
3. From the **Display Results** list of values, select a display option.
4. Click the **Start** button to display the summary.
5. To export the **Quiz Summary** to a file for Excel, click the **Export as CSV file** button.

32.1.4 Meeting Usage Reports

Meeting Usage Reports contain information about meetings that were run in the Moderator's account.

Note: Due to the nature of the data retrieval process, the information in this report will be a day old.

To view Meeting Usage Reports:

1. From the Conference Manager, click **Reports**.
2. Select **Meeting Usage Reports**.
3. Select a date range to generate a report for a specific time period.
4. Click the **Display** button. This displays the Meeting Usage Reports page listing all meetings that took place during the period you specified. It also lists meeting date, moderator and meeting duration.

- Clicking on a specific meeting displays more details, including meeting participants, their connection type (audio, web or streaming), the time they entered the meeting, meeting duration, costs they incurred and currency used.

33 Phone Access

Use this as a guide for your voice-only meetings

Starting/accessing a meeting

Moderator:

- Dial your Meeting Number.

LocalConnect Service:

- Dial the closest city dial-in number, then your Meeting Number. Ensure that the Meeting Number is preceded and followed by the b key.
- Enter your 4-digit PIN, ensuring the number is preceded and followed by the b key.

Note: Moderators with the account code option will be prompted to enter a 1-16 digit number that represents a billing or project code, prefixed and followed by the b key. Please contact Customer Service to activate this option.

Participants:

- Participants dial your Meeting number.

LocalConnect Service:

- Participants dial the closest city dial-in number, then the Meeting Number, ensuring that the Meeting Number is preceded and followed by the * key.

Feature	Function	Description
*phone number *	Dial Out	Dial out to participants (include country code if international participants)
2	Disconnect Last Participant	Disconnect last entered participant or last number dialed out to.
3	Redial	Redial the latest outgoing call.
*6 *	Self Mute / Unmute	Moderator and Participants can self-mute / unmute their own line.
7	Close/Open Door	Close/Open meeting room.
PIN 7	Open Meeting with Door Closed	Open meeting room but keep door closed.
1	Receive Participants	Allow participants into the meeting one by one from the waiting or greeting rooms.
9	End Conference	End the conference call and disconnect all participants.

Feature	Function	Description
10	Connect/Disconnect Global Helpdesk	Provides private conversation with Helpdesk Technician
50	Listen Only Q&A	Activates/Deactivates Listen Only (Mute) with Q&A
*	Request the Floor	A participant requests the floor to ask a question.
5	Grant the Floor	Moderator gives the floor to the next participant who has requested the floor.
51	Listen Only	Activates/Deactivates the Listen Only (mute all) mode.
52	Listen Only	Mutes/Un-mutes all participants. Allows participants to unmute themselves using *6*
70	Enable/Disable Conference Security Code	Enable/Disable Conference Security Code on a per call basis.
*4#### *	Set the Conference Security Code	Provides an additional security option for conferences in addition to the meeting room number.
4	Delete Conference Security Code	Delete the current Conference Security Code
73	Activate/Deactivate Entry/Exit Announcements	Activates/Deactivates Participant Entry and Exit Announcements. Note: When Roll Call is enabled,* 73* allows moderator to cycle through 4 announcement options (tone, announcement, name announcement, or no announcement)
74	Activate/Deactivate Roll Call	Allows Moderator to activate/deactivate roll call. Participants are prompted to record their name that will be played upon conference entry and exit.
78	Participant Name Record	Requires participants who have not recorded their name to do so.
007	Replay Participant Name/Count	Announces each participant's name when roll call is active. When roll call is not active, participant count will be given.