



Cisco IP SoftPhone 1.3

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1 How to Get Started with Cisco IP SoftPhone

This guide is a quick reference for you to get started with Cisco IP SoftPhone. For detailed information about how to install and use your Cisco IP SoftPhone, refer to the *Cisco IP SoftPhone User Guide*. To view the user guide online, go to **Start > Programs > Cisco IP SoftPhone > User Manual**. This information is also available through the online help. To access the online help, click the **HELP** icon in the Cisco IP SoftPhone main dialing window, or click the **Help** button in any dialog box.

How to Obtain Documentation

The following sections provide sources for obtaining documentation from Cisco Systems.

World Wide Web

You can access the most current Cisco documentation on the World Wide Web at the following sites:

- <http://www.cisco.com>
- <http://www-china.cisco.com>
- <http://www-europe.cisco.com>

Documentation CD-ROM

Cisco documentation and additional literature are available in a CD-ROM package, which ships with your product. The Documentation CD-ROM is updated monthly and may be more current than printed documentation. The CD-ROM package is available as a single unit or as an annual subscription.

How to Order Documentation

Cisco documentation is available in the following ways:

- Registered Cisco Direct Customers can order Cisco Product documentation from the Networking Products Marketplace:
http://www.cisco.com/cgi-bin/order/order_root.pl
- Registered Cisco.com users can order the Documentation CD-ROM through the online Subscription Store:
<http://www.cisco.com/go/subscription>



Nonregistered Cisco.com users can order documentation through a local account representative by calling Cisco corporate headquarters (California, USA) at 408 526-7208 or, in North America, by calling 800 553-NETS(6387).

2 How to Install Cisco IP SoftPhone

Depending on how your system administrator has set up Cisco IP SoftPhone on your network, you can install the Cisco IP SoftPhone using one of the following procedures:

- How to Install from a Web Page, page 3
- How to Install from a Self-extracting Executable, page 4
- How to Install from a CD-ROM, page 6

How to Install from a Web Page

Use this procedure to install Cisco IP SoftPhone from an intranet web page.



Note You can use this procedure only if your Cisco IP SoftPhone administrator has created a “one-click install” on your web server.

Before You Begin

- Install Microsoft Internet Explorer 4.01 or later.
- You can download this browser from the Microsoft web site at <http://www.microsoft.com/windows/ie/>
- Obtain the following information from your network or system administrator:
 - The URL for the Cisco IP SoftPhone installation files
 - The username and password configured for you on the Cisco CallManager

Procedure

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- Step 1** Open a web browser and go to the URL where the Cisco IP SoftPhone installation files reside.
 - Step 2** Choose the language in which you want to view Cisco IP SoftPhone.
 - Step 3** If you are use Netscape Communicator, click **Grant** in the Java Security window.
 - Step 4** Click the **Install Now** button.
 - Step 5** Read the software authenticity verification and click **Next** to begin the installation.

- Step 6** For a first-time installation of Cisco IP SoftPhone:
- Click **Next** in the Welcome screen to begin the installation.
 - Read the software license agreement and then click **Yes** to accept the terms of the agreement.
 - Choose a destination where you want to install Cisco IP SoftPhone and then click **Next**.
- For upgrades to a newer version of Cisco IP SoftPhone, choose **Upgrade to a Newer Version** and click **Next** in the Welcome screen.

- Step 7** In the Local TSP Configuration screen, enter your username and password and then click **Next**.



Note The username and password you configure for Cisco IP SoftPhone must be exactly the same as your username and password on the Cisco CallManager.

- Step 8** For a first-time installation of Cisco IP SoftPhone, select a Program Folder where you want the Installer to add icons.

By default, the Installer adds icons to a folder called Cisco IP SoftPhone.

- Step 9** Click **Next** and follow the instructions on the screen.

- Step 10** In the Install Wizard Complete dialog window, choose whether you want to restart your computer now or later, and click **Finish** to complete the installation.

You must restart your computer before you can use Cisco IP SoftPhone.

How to Install from a Self-extracting Executable

Use this procedure to install Cisco IP SoftPhone from a self-extracting executable. This installation procedure allows you to download Cisco IP SoftPhone to your local drive and install the program at a later time.

Before You Begin

- Install Microsoft Internet Explorer 4.01 or later.
You can download this browser from the Microsoft web site at <http://www.microsoft.com/windows/ie/>
- Obtain the following information from your network or system administrator:
 - The URL for the Cisco IP SoftPhone installation files
 - Your username and password on the Cisco CallManager



Procedure

-
- Step 1** Open a web browser and go to the URL where the Cisco IP SoftPhone installation files reside.
- Step 2** Click the language in which you wish to install Cisco IP SoftPhone.
- Step 3** If you are using Netscape Communicator, click **Grant** in the Java Security window.
- Step 4** Click **download the Cisco IP SoftPhone installation**.

The Cisco IP SoftPhone download instructions window appears with the URL where the Cisco IP SoftPhone customization files reside.

- Step 5** Make a note of the URL which you must provide in step 13.
- Step 6** Click **Cisco IP SoftPhone** to download the self-extracting executable.
- Step 7** In the File download window, choose either to **Run this program from its current location** or **Save this program to disk** and then click **OK**.

If you select **Run this program from its current location**, skip to Step 10.

- Step 8** Choose a destination where you want to download the installation files and click **Save**.
- Step 9** In the Download complete window, choose one of the following procedures:
- Click **Open** to launch **CiscoIPSoftPhoneSetup.exe** and begin the installation.
 - Click **Open Folder** and launch **CiscoIPSoftPhoneSetup.exe** from the folder.
 - Click **Close** to launch **CiscoIPSoftPhoneSetup.exe** at a later time.
- Step 10** Choose the language in which you would like the installation screens to appear and click **OK**.
- Step 11** Choose the destination where you want to download the installation files and click **Save**.
- Step 12** For first-time installation of Cisco IP SoftPhone:
- a. Click **Next** in the Welcome screen to begin the installation.
 - b. Read the software license agreement and then click **Yes** to accept the terms of the agreement.
 - c. Choose a destination to which you want to install Cisco IP SoftPhone and then click **Next**.

For upgrades to a new version of Cisco IP SoftPhone, choose **Upgrade to a Newer Version** and click **Next** in the Welcome screen.

- Step 13** In the Setup window, specify the URL where the customization files reside.



Caution

If you do not specify the correct URL, you will not receive customization files such as Microsoft NetMeeting 3.01, Cisco TSP and Cisco IP SoftPhone settings. You need these files to run Cisco IP SoftPhone.

Step 14 In the Local TSP Configuration screen, enter your username and password.



Note The username and password you configure for Cisco IP SoftPhone must be exactly the same as your username and password on the Cisco CallManager.

Step 15 Click **Next**

Step 16 For a first-time installation of Cisco IP SoftPhone, select a Program Folder where you want the Installer to add icons.

By default, the Installer adds icons to a folder called Cisco IP SoftPhone.

Step 17 Follow the instructions on the screen.

Step 18 In the Install Wizard Complete dialog window, choose whether you want to restart your computer now or later, and click **Finish** to complete the installation.

You must restart your computer before you can use Cisco IP SoftPhone.

How to Install from a CD-ROM

Use this procedure to install Cisco IP SoftPhone from a CD-ROM.

Before You Begin

- Install Microsoft Internet Explorer 4.01 or later.

You can download this browser from the Microsoft web site at <http://www.microsoft.com/windows/ie/>

- Obtain the following information from your network or system administrator:
 - Your username and password on the Cisco CallManager.
 - The location of the customization files (if any) for the Cisco IP SoftPhone installation.
 - Which version of Cisco CallManager your Cisco IP SoftPhone is configured with, for example, Cisco CallManager 3.2.

For Cisco CallManager 3.1 and later:

- The primary and backup CTI IP Manager addresses of the Cisco CallManager server you use.
- Whether the Cisco Emergency Responder (CER) service is configured on the Cisco CallManager.
- If CER is configured, the primary and backup server URLs for Cisco IP SoftPhone.



For Cisco CallManager 3.0:

- The IP address of the Cisco CallManager server you use.

Procedure

- Step 1** Insert the installation CD-ROM and run **Launch.exe** to start the Cisco IP SoftPhone installation.
- Step 2** In the Demonstration Language window, select the language in which you want to view the installation windows and click **OK**.
- Step 3** Click **Install Products**.
- Step 4** Click the **Cisco IP SoftPhone** button.
- Step 5** Choose the language in which you want to install Cisco IP SoftPhone from the drop-down menu and click **OK**.
- The InstallShield wizard launches and prepares for the installation.
- Step 6** Click **Next** in the welcome screen to begin the installation.
- Step 7** Read the software license agreement and then click **Yes** to accept the terms of the agreement.
- Step 8** Choose a destination where you want to install Cisco IP SoftPhone and then click **Next**.
By default, the installation program installs Cisco IP SoftPhone in the following directory:
C:\...\Cisco Systems\Cisco IP SoftPhone
- Step 9** If you use customization files:
- Enter the URL where the customization files reside and click **Next**.
- If you do not use customization files:
- Leave the URL field blank and click **Back**. A question box asks whether you want to download and import the customization files.
 - Click **No**.
- Step 10** If the Cisco Emergency Responder (CER) service is configured on the Cisco CallManager, you are asked if you wish to configure the SoftPhone for Cisco Emergency Responder:
- Click **Yes** in the question box.
 - Enter the primary and backup CER server URLs and click **Next**.
- If the CER service is not configured on the Cisco CallManager:
- Click **No**.

Step 11 In the SoftPhone Setup screen, choose the Cisco CallManager version you use and click **Next**.

Step 12 Use one of the following procedures to configure the Local TSP:

For Cisco CallManager 3.1 and later:

- a. Enter your username and password in the Local TSP Configuration screen.



Note The username and password you configure for Cisco IP SoftPhone must be exactly the same as your username and password on the Cisco CallManager.

- b. If you do not use customization files, enter the primary and backup CTI Manager IP addresses for the Cisco CallManager.

For Cisco CallManager 3.0:

- a. Enter your username and password in the Local TSP Configuration screen.



Note The username and password you configure for Cisco IP SoftPhone must be exactly the same as the username and password assigned to you on the Cisco CallManager.

- b. If you do not use customization files, enter the IP address for the Cisco CallManager.

Step 13 Click **Next**.

Step 14 Select a Program folder to which you want the Installer to add icons.

By default, the Installer adds icons to a folder called Cisco IP SoftPhone.

Step 15 Follow the instructions on the screen.

Step 16 In the Install Wizard Complete dialog window, choose whether you want to restart your computer now or later, and click **Finish** to complete the installation.

You must restart your computer before you can use Cisco IP SoftPhone.

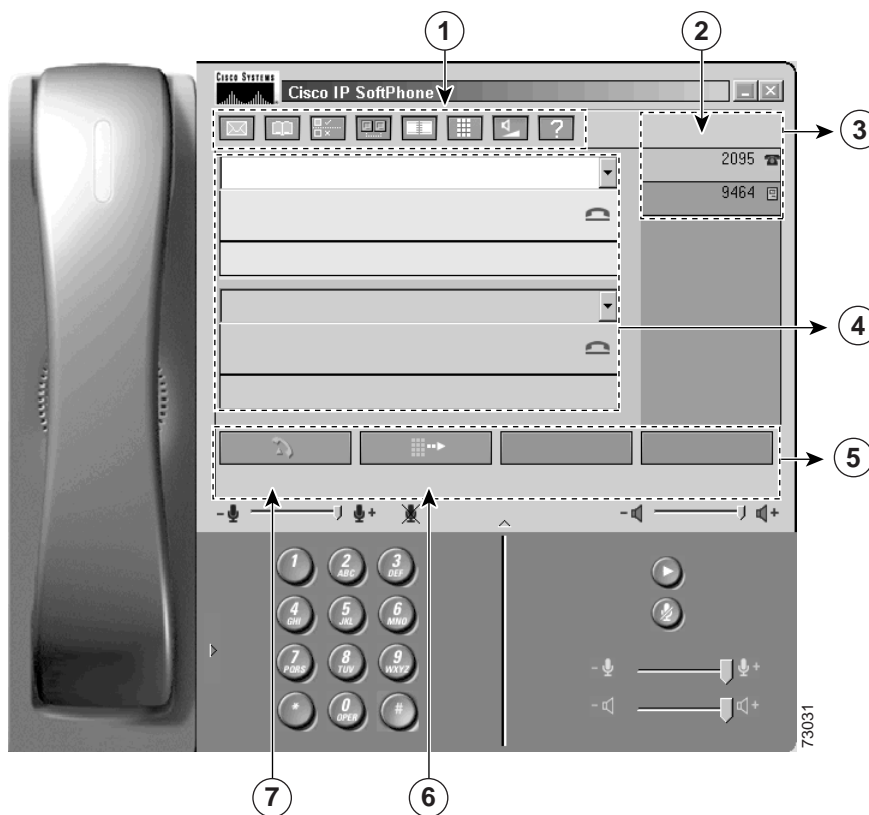


3 How to Use Cisco IP SoftPhone

Cisco IP SoftPhone turns your computer into a full-feature IP telephone. Cisco IP SoftPhone performs all the functions of a traditional telephone with the added advantages of call tracking, desktop collaboration, and one-click dialing from online directories. You can also use Cisco IP SoftPhone in tandem with a Cisco IP Phone to place, receive and control calls from your desktop PC. Both devices reflect the same current call state.

Figure 1 shows the key components of the main dialing window.

Figure 1 Main Dialing Window



1	Icon bar	2	Line(s) display	3	Line buttons	4	Call blocks
5	Context-sensitive button bar	6	Redial soft key	7	OffHook soft key		

How to Start Cisco IP SoftPhone



Caution

If you are using VPN software, be sure to launch it and verify that it is working before you start Cisco IP SoftPhone.

Procedure

Step 1 From the Windows Start menu, choose **Programs > Cisco IP SoftPhone > Cisco IP SoftPhone**.

The first time you start Cisco IP SoftPhone, the Microsoft NetMeeting configuration program display followed by the Cisco IP SoftPhone Line Selection window. On subsequent sessions, the main dialing window opens.

Step 2 In the NetMeeting configuration window, follow the instructions on the screen to tune audio parameters and to specify user information for your system.

You do not see this window if you have previously configured Microsoft NetMeeting.



Caution

You must configure settings for NetMeeting for the collaboration features of Cisco IP SoftPhone to work.

Step 3 In the line selection window, click on the line(s) you want to control and click **OK**.

If no lines display in the line selection window, see the troubleshooting procedures in the online help and the *Cisco IP SoftPhone User Guide*.

How to Exit Cisco IP SoftPhone

To exit Cisco IP SoftPhone, use one of the following procedures:

- Click your right mouse button and select **Exit** from the floating menu.
- Click the **x** in the upper right corner of the main dialing window.
- Press the ALT-F4 on your keyboard.



How to Select Lines to Control

The first time you launch Cisco IP SoftPhone, a dialog box appears for you to select the lines your system administrator has assigned to you on the Cisco CallManager. Or, you can use this procedure to select the lines.

Procedure

Step 1 Click the **Settings** toolbar icon.



This opens the Settings dialog window.

Step 2 Click the **Advanced** tab.

Step 3 Click **Select Lines...** on the Advanced tab.

This opens the SoftPhone Line Selection window.

Step 4 Select the line(s) you want to control and click **OK**.



Note If no lines display in the line selection window, see the troubleshooting procedures in the online help and the *Cisco IP SoftPhone User Guide*.

Step 5 Click **OK** to close the Settings dialog window.

When the lines connect, the main dialing window appears.

How to Select Your Cisco IP Phone Line

If you have multiple lines configured for you on the Cisco CallManager, you may see two types of entries in the line selection window:

- An entry with the device name and extension assigned to your Cisco IP Phone or Cisco IP SoftPhone. For example:

```
Cisco Line: [CTIPJSmith] [52222]
```

- An entry with the Media Access Control (MAC) address and extension assigned to your Cisco IP Phone. For example:

```
Cisco Line: [SEP003049C2B80F] [52222]
```

To use Cisco IP SoftPhone as a stand-alone phone, select the entry that contains the device name assigned to your Cisco IP Phone or Cisco IP SoftPhone.

To use Cisco IP SoftPhone in tandem with your Cisco IP Phone, select the entry that contains the MAC address for your Cisco IP Phone.



Note Cisco IP SoftPhone can also be used to control phones on supported analog lines. If you are using an analog line, your line displays like the MAC address.

How to Place a Call

Procedure

Step 1 In the main dialing window, click the line button for the line you want to use.

Step 2 Dial the number you want to call in one of the following ways:

- Use your keyboard to type the number in the destination box and press **Enter**.
- Enter the e-mail address or name (partial or full) for the person you want to call and press CTRL-K.



Note To use this feature, you must have a directory entry for the recipient that includes an e-mail address and phone number or you must have a Cisco CallManager (LDAP) directory configured.

- Use your mouse to click the keys on the online keypad and click **Dial**.
- Drag the number from your Internet browser into the destination box.
- Open a Cisco IP SoftPhone directory, click your mouse on the name of the person you want to dial and click **Dial** or drag the dialing directory number to the dialing box.
- Click on the arrow next to the dialing box, select the number from the list of recently dialed numbers, and click **Dial**.
- Copy the number from any Windows program, paste it into the destination box, and click **Dial**.

When the call connects, the context-sensitive button bar displays buttons that enable you to perform additional call functions.



How to End a Call

To disconnect a call, click the **End Call** button, or press ESC on your computer keyboard.

To use Cisco IP SoftPhone with a Cisco IP Phone, you can also put the phone on-hook to end a call.

How to Answer a Call

Click the **Answer** button to answer an incoming call.

Additionally, if you use Cisco IP SoftPhone with a Cisco IP Phone, you can answer an incoming call simply by picking up the handset or by using any answering method supported by the physical phone.

Placing a Call on Hold

To place an active call on hold, click the **Hold** button in the context-sensitive button bar or the **Hold** button on the Cisco IP Phone.

While the call is on hold, caller information, and the time on hold are displayed in the call block.

To retrieve a call on hold, press the **Resume** button in the context-sensitive button bar, or the **Resume** key on the Cisco IP Phone.

How to Transfer a Call

Call transfer allows you to send an existing call to another internal or external extension. With Cisco IP SoftPhone, you can perform a consult transfer or a direct transfer.

How to Perform a Consult Transfer

In a consult transfer, also called an attended transfer, you place a consultation call to the intended recipient before you transfer the call.

Procedure

- Step 1** During an active call, click the **Transfer** button in the context-sensitive button bar or the **Transfer** key on the Cisco IP Phone.
 - Step 2** In the dialing box, enter the new destination.
 - Step 3** Press **Consult** and announce the call to the new destination.
 - Step 4** Press **Send Call**.
When the transfer is complete, both the original and the consultation call are removed from your screen.
-

How to Perform a Direct Transfer

In a direct transfer (also called an unattended transfer), you immediately transfer the original call to the destination without a consultation call.

Procedure

- Step 1** During an active call, click the **Transfer** button in the context-sensitive button bar, or the **Transfer** key on the Cisco IP Phone.
 - Step 2** In the transfer destination box, enter the new destination.
 - Step 3** Press **Enter** on the keyboard or click **Send Call** to complete the transfer.
-



How to Start an Audio Conference

You may add participants to an audio conference call at any time, even while a collaboration session is in progress. The new participant join both the audio and data portions of the conference. The most current data from the collaboration session displays on the new participant's PC. Up to six can participate in any given conference.

Procedure

- Step 1** Place a call to the first conference call destination.
- Step 2** Once you have established a connection, click the **Conference** button in the context-sensitive button bar.
- Step 3** In the destination box, enter the second conference call destination.



Timesaver You can drag conference call destinations from your personal and public dialing directories into the destination box.

- Step 4** Click **Invite** or press **Enter**.
 - Step 5** Click **Join** to set up a three-way conference between yourself, the first destination, and the second destination.
 - Step 6** Repeat steps 2 through 5 to add additional participants to the conference. A maximum of six can participate in an audio conference.
-

How to Leave a Conference Call

To leave an audio conference, click the **End Call** button in the context-sensitive button bar.

How to Configure Your Voice Mailbox

Before you can access your voice mail with Cisco IP SoftPhone, you must configure the number for your voice mailbox.

Procedure

Step 1 Click the **Settings** toolbar icon.



This opens the Call Control tab.

Step 2 Enter the number for your voice mailbox in the Voice mail Destination box.
Your system administrator assigns this number.

Step 3 Click **OK**.

How to Check Voice Mail

When you have a voice mail message, the messages icon in the icon bar turns red until you check your messages as follows:

Prerequisite

Configure your voice mailbox.

Procedure

Step 1 Click the **Voice Mail Message** toolbar icon.



A pop-up dialog box displays the lines which have voice mail.

Step 2 Select the line for which you want to check voice mail.
Cisco IP SoftPhone automatically dials your voice mailbox.

Step 3 Follow the voice prompts to access your voice mail.



How to Forward All Calls to Voice Mail

Use this procedure to automatically forward all calls to voice mail.

Prerequisite

Configure your voice mailbox.

Procedure

Step 1 Click the **Settings** toolbar icon.



This opens the Call Control tab.

Step 2 Enable the checkbox next to “Forward All Incoming Calls to Voicemail.”

Step 3 Click **OK**.

How to Remove Call Forward

Procedure

Step 1 Click the **Settings** toolbar icon.

Step 2 Uncheck the “Forward All Incoming Calls to Voicemail” option on the Call Control tab.

Step 3 Click **OK**.

How to Use the Call Log



Whenever you place a call, Cisco IP SoftPhone displays the caller address, caller name, and the number dialed for the duration of the call. It also logs this information to a call history file. The call history file contains the call destination, time, and the call length.

Use Call Log to perform the following tasks:

- To view the call history file, click the Call Log icon in the icon bar or click your right mouse button and choose **Call Logs** from the floating menu.
- To place a call to someone in the Call Log, simply select the entry and click **Dial** or select the entry and drag and drop it to the SoftPhone interface.
- To clear all entries in the Call Log, click **Clear All**.

How to Use Dialing Directories

Cisco IP SoftPhone integrates with the directory service on the Cisco CallManager. Additionally, the Cisco IP SoftPhone provides a personal directory for you to store directory entries that are not available in the corporate or public directories. It also integrates with other private directories like those implemented by various email clients.

How to Dial from the Online Directories

Procedure

Step 1 Click the **Directories** toolbar icon.



This opens the directories window.

Step 2 Select the desired directory from the drop-down list box.



Step 3 Enter the name of the person you want to call in one of the following ways:

- Click in the Find box and type the person's name.
- Click **Show All** and scroll to the name in the directory.
A maximum of 500 entries are displayed.
- Drag the name of the person you want to call from the directory to the destination box in the main dialing window.

Step 4 Click **Dial**.



Timesaver To narrow the list of names displayed in the directory, type the first few characters of the person's name in the find box and then click **Find**.

How to Add a Directory Entry

Procedure

Step 1 Click the **Directories** toolbar icon.



This opens the directories window.

Step 2 Click the **Add** button to open the Add/Edit Directory Entry dialog window.

Step 3 Type the address information in the entry boxes.

Step 4 When you are finished, click **OK**.

How to Delete a Directory Entry



Note You cannot delete names from a public directory.

Procedure

Step 1 Click the **Directories** toolbar icon.



This opens the directories window.

Step 2 Select the **Personal** directory name from the drop-down list box.

Step 3 Select the entry you want to delete.

Step 4 Click **Remove Entry**.

Step 5 A confirmation message asks if you want to delete the entry.

Step 6 Click **Yes** to remove the entry from the Directories dialog window or click **No** to retain the entry.

How to Edit a Directory Entry



Note You cannot edit names in a public directory.

Procedure

Step 1 Click the **Directories** toolbar icon.



This opens the directories window.

Step 2 Select the Personal directory name from the drop-down list box.

Step 3 Double-click on the directory entry you want to edit, or select it with your mouse and then click **Edit**.

This opens the Add/Edit Directory Entry dialog window.



Step 4 Make the desired changes to the address information.

Step 5 Click **OK** to enable your changes.

4 How to Collaborate with a Virtual Conference Room

Cisco IP SoftPhone includes a desktop collaboration utility called Virtual Conference Room. You can use Virtual Conference Room to create online meetings where all parties can hear each other and any party can share a document, application, or whiteboard with other participants. Only one computer must have the program, and any participant can be given control of the document. Additionally, you can integrate with Microsoft NetMeeting for video and other modes of collaboration.

Collaboration Checklist

Before you begin a collaboration session, check the following settings:

- **Collaboration Setting.** Open the Settings window and verify that “Virtual Conference Room” is selected for the Collaboration Setting on the Advanced tab.
- **Associated PC Setting.** Open your personal or public directory and verify that the correct host name or IP address is specified for the “Associated PC” entry for all participants in the collaboration session, including yourself. If the “Associated PC” is not specified or incorrect for a participant, you must add or update the entry in your personal directory, or contact your system administrator to update the public directory. When you set up a collaboration session, Cisco IP SoftPhone first looks for the participants in your personal directory. If it does not find an entry, it then looks in the public directory.



Note If you are using a public directory, make sure that the Net IP Audio Setting is configured for Automatic and that the Cisco CallManager directory is correctly configured.

- **NetMeeting Settings.** If you have upgraded your NetMeeting installation (version 3.01 or greater) since you installed Cisco IP SoftPhone, be sure to tune your audio settings and configure user settings for NetMeeting.

NetMeeting version 3.01 gets installed as part of the Cisco IP SoftPhone installation. You typically tune your audio settings and configure user settings for NetMeeting the first time you run Cisco IP SoftPhone.

When all collaboration settings are correct, the icon next to each participants name is highlighted in green in the roster window.

How to Start a Document Sharing Session

Procedure

Step 1 While in a call or audio conference, click the collaboration icon.



In the roster window, verify that each participant's name is highlighted in green.

If a participant's name is not highlighted in green on the roster, use the collaboration checklist to verify that you met all collaboration conditions.

Step 2 Click the **Applications List** button on the roster.

A list of the applications that are currently active on your computer is displayed.

Step 3 Click **Browse** and choose the file you want to share, or open your Microsoft Windows Explorer and drag the file icon into the list of applications in the roster window.

Cisco IP SoftPhone opens the file and associated application on your desktop and adds it to the list of active applications in the roster window.

Step 4 Select the file from the list of applications in the roster window and click **Share**.

The file is displayed in a new window on each participant's computer screen, whether they have installed the associated application or not.

Initially, you have control of the file. However, you can allow transfer of control at anytime.



Timesaver You can also share an application or document by dragging it from the Windows Explorer onto the Applications button in the roster window.

How to Request Control of a Document

While in a document or application sharing session, only one person can control a shared program at a time. Initially, the person who started the application or document sharing session has control. However, you can request control simply by double-clicking in the document sharing application window, or choosing **Control > Request Control** in the roster window. Cisco IP SoftPhone sends a message to the person in control, asking them to accept or reject your request. If the person does not respond to your request within 10 seconds, the request fails.



How to End a Document Sharing Session

A document sharing session can only be ended by the person who initiated the session. To end a document sharing session, select the document in the roster window and click **Unshare**, or simply close the document or application. The document window for the shared file is removed from each participant's screen.

How to Start a Whiteboard Session

Procedure

Step 1 While in a call or audio conference, click the collaboration icon



The roster displays all the participants in the call.

Step 2 In the roster window, verify that each participant's name is highlighted in green.

If a participant's name is not highlighted in green on the roster, use the collaboration checklist to verify that you met all collaboration conditions.

Step 3 Click the whiteboard icon in the roster.



An empty whiteboard window will display on each participant's computer screen.

Step 4 Use the whiteboard tools to illustrate your ideas in the whiteboard window. Each meeting participant will see your work without having access to your desktop.

For details on how to use the whiteboard tools, click the **help** button in the whiteboard window to access online help.

How to End a Whiteboard Session

To end a whiteboard session, close the whiteboard window after (optionally) you save its contents. When you close the whiteboard, it remains open on each participant's computer screen. This allows participants to save its contents on their local drive and then close the whiteboard window when they are done.

If you leave a whiteboard session but remain in the call, you can re-join the whiteboard session at any time. Simply click the whiteboard button.



Note If you initiate a whiteboard session and exit Cisco IP SoftPhone while other participants remain in the whiteboard session, the whiteboard session automatically terminates on each participants' PC.

How to Send a Chat Message

Procedure

Step 1 While in a call or audio conference, click the collaboration icon.



The roster displays all the participants in the call.

Step 2 Click the **Chat** button to open the Chat window.

In the **Message** block, type the message you want to send, then do one of the following:

- To send a message to all meeting participants, select **Everyone In Chat** from the **Send to** drop-down list.
- To send a message to just one person, select the person's name from the **Send To** drop-down list.

Step 3 Click the **Send Message** button or press **Enter** on your keyboard to send the chat message.



How to Prepare for a Video Collaboration Session

To use the video collaboration features of NetMeeting, you must disable Virtual Conference Room and enable NetMeeting as follows.

Procedure

Step 1 Click the **Settings** toolbar icon.



This opens the Settings dialog window.

Step 2 Click the **Advanced** tab.

Step 3 Change the collaboration setting to NetMeeting.

Step 4 Click **OK**.

Step 5 Restart Cisco IP SoftPhone for this setting to take effect.

When you restart Cisco IP SoftPhone, Cisco IP SoftPhone uses the NetMeeting user interface to place calls. To start NetMeeting, open the roster and click the **Launch NetMeeting Call** button.

See the Microsoft NetMeeting online help for details on how to do use the video collaboration features of NetMeeting.



**Corporate Headquarters**

Cisco Systems, Inc.
170 West Tasman Drive
San Jose, CA 95134-1706
USA
www.cisco.com
Tel: 408 526-4000
800 553-NETS (6387)
Fax: 408 526-4100

European Headquarters

Cisco Systems Europe
11 Rue Camille Desmoulins
92782 Issy-les-Moulineaux
Cedex 9
France
www-europe.cisco.com
Tel: 33 1 58 04 60 00
Fax: 33 1 58 04 61 00

Americas Headquarters

Cisco Systems, Inc.
170 West Tasman Drive
San Jose, CA 95134-1706
USA
www.cisco.com
Tel: 408 526-7660
Fax: 408 527-0883

Asia Pacific Headquarters

Cisco Systems, Inc.
Capital Tower
168 Robinson Road
#22-01 to #29-01
Singapore 068912
www.cisco.com
Tel: +65 317 7777
Fax: +65 317 7799

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