



How to Use Virtual Conference Room

These sections help you understand and use the Virtual Conference Room desktop collaboration features of Cisco IP SoftPhone:

- [How to Verify Settings, page 4-1](#)
- [How to Use the Roster, page 4-3](#)
- [How to Use the Application Sharing Window, page 4-4](#)
- [How to Start a Whiteboard Session, page 4-8](#)
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- [How to Prepare for a Video Collaboration Session, page 4-12](#)

How to Verify Settings

Before you begin a collaboration session, verify the settings in [Table 4-1](#).



Note

The collaboration features of Cisco IP SoftPhone do not work unless you configure settings for NetMeeting. See [“How to Diagnose Problems with Collaboration” section on page A-17](#) for details on how to configure settings for NetMeeting.

Table 4-1 How to Verify Settings

Setting	Description
Collaboration	Open the Settings window and verify that “Virtual Conference Room” is selected for the Collaboration Setting on the Advanced tab.
Associated PC	<p>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. (This includes yourself.) If you do not specify the “Associated PC” or if it is 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.</p> <p>When Cisco IP SoftPhone sets up a collaboration session, it first looks for the participants in your personal directory. If it does not find an entry, it then looks in the public directory.</p> <p>Note If you are using a public directory, make sure that the “Auto Network IP Setting” is properly configured and selected.</p>
Microsoft NetMeeting	<p>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.</p> <p>NetMeeting version 3.01 is installed as part of the Cisco IP SoftPhone installation. You typically tune your audio settings and configure user settings for NetMeeting the very first time you run Cisco IP SoftPhone.</p>

How to Use the Roster



When you click the Collaboration icon while in a call or audio conference, Cisco IP SoftPhone displays a roster window on your computer screen. The roster shows a list of the participants in the call and their phone numbers. It updates this list as participants join and exit the conference. The roster includes icons you can click to share a whiteboard, application, or document, or start a chat session with other participants in the call.

If participants are able to collaborate, the icon next to their name in the roster window is highlighted in green.

**Tip**

If the roster does not display a participant's name highlighted in green, verify that you have met all collaboration conditions. See the [“How to Verify Settings” section on page 4-1](#) for details.

Related Topics

- [Desktop Collaboration with Virtual Conference Room, page 1-7](#)
- [How to Verify Settings, page 4-1](#)
- [How to Use the Application Sharing Window, page 4-4](#)
- [Start a Document Sharing Session, page 4-5](#)
- [How to Start a Whiteboard Session, page 4-8](#)
- [How to Send a Chat Message, page 4-11](#)

How to Use the Application Sharing Window

The Applications List button in the roster window displays a list of the applications and files you currently have open on your machine.

In the Application Sharing Window, you can perform the following tasks:

- To start a whiteboarding session, click the checkbox to the left of the Chat button.
- To start a chat session, click **Chat**.
- To initiate a data collaboration session or to collapse or expand the application window, click **Applications List**.
- To share a file with other participants, click on the file and drag it into the roster window.

Table 4-2 describes the application sharing controls in the button bar.

Table 4-2 Application Sharing Controls

Control	Description
Refresh button	Refreshes the list of applications in the roster window.
Share button	Shares the application or file selected in the roster window with all participants in the call.
Unshare button	Stops sharing the application or file selected in the roster window and removes the image from each participant's computer screen.
Browse button	Opens the file you choose, adds it to the list of applications in the roster window, and shares the associated application.
“Allow control of shared applications” checkbox	Assigns and removes control of shared applications. This option is active only when at least two parties in the call can collaborate.

Related Topics

- [How to Verify Settings, page 4-1](#)
- [How to Use the Roster, page 4-3](#)
- [Start a Document Sharing Session, page 4-5](#)
- [Transfer Control of a Document, page 4-7](#)
- [Request Control of a Document, page 4-8](#)
- [End a Document Sharing Session, page 4-8](#)

Start a Document Sharing Session

When you start a document or application sharing session, Cisco IP SoftPhone opens a new window on each person's desktop and displays the shared file. Initially, you have control of the file. However, you can transfer control to any of the participants. This allows them to make changes even if they do not have the associated application installed on their computers.

You can share more than one program at a time and several people can share programs simultaneously. Also, you can share a whiteboard and document at the same time.



Note

To share applications and documents, you must list each participant in your public or personal directory with the correct Associated PC address configured. See [“Add a Directory Entry” section on page 3-32](#) for details.

Procedure

- Step 1** While in a call or audio conference, click the **Applications List** button on the roster.
- A list of the applications that are currently active on your computer displays.
- Step 2** 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.

Step 3 Select the file from the list of applications in the roster and click **Share**.

The file is displayed in a new window on each participant's computer screen, regardless of whether they have the associated application installed.

Initially, you have control of the file. However, you can allow transfer of control at any time. See the "[Transfer Control of a Document](#)" section on page 4-7 for details.

**Tip**

Another way to share an application or document is to drag it from the Windows Explorer into the roster window.

**Caution**

If you share a Windows Explorer window, such as My Computer, Control Panel, or a folder on your computer, you share all the Explorer windows you have open. Also, once you share such a window, every program you start while you are still in the meeting is automatically shared with the other participants.

Related Topics

- [Desktop Collaboration with Virtual Conference Room, page 1-7](#)
- [Application and Document Sharing, page 1-8](#)
- [How to Verify Settings, page 4-1](#)
- [How to Use the Application Sharing Window, page 4-4](#)
- [Transfer Control of a Document, page 4-7](#)
- [Request Control of a Document, page 4-8](#)
- [End a Document Sharing Session, page 4-8](#)

Transfer Control of a Document

While in a document or application sharing session, the person who initially shared the document or application controls the file. This person, called the “Top Provider” can transfer control of the file to other participants in the session. However, only one person can control a shared program at a time. When the Top Provider allows others to work on the program, the word **Controllable** appears in the title bar of the shared program window. Participants can send a request to the Top Provider to ask for control of the file. If the mouse pointer has a box with initials, then another meeting participant controls the program.

**Note**

You can only transfer and remove control of a shared file if you are the Top Provider.

Procedure

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- Step 1** Start a document sharing session.
See the [“Start a Document Sharing Session” section on page 4-5](#).
- Step 2** In the roster window, click on the participant to whom you would like to transfer control of the document.
- Step 3** Click in the checkbox next to “Allow control of shared applications.”
The roster displays “In Control” next to the participant’s name. This person now has control of the file. **Controllable** appears in the title bar of the shared program window on each participant’s computer screen.
To regain control of a shared application or file, double-click on the shared application.
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Related Topics

- [Request Control of a Document, page 4-8](#)
- [End a Document Sharing Session, page 4-8](#)

Request Control of a Document

If you are a participant in a document sharing session, you can request control of the document from the Top Provider in a couple of ways: double-click in the document sharing application window, or choose **Control > Request Control**. Cisco IP SoftPhone sends a message to the Top Provider to accept or reject your request. For example,

Jane Smith would like to take control of your shared programs.

If the Top Provider does not respond to your request within 10 seconds, the request fails.

End a Document Sharing Session

To end a document sharing session, select the document in the roster window and click **Unshare**. This closes the document window for the shared file and removes the document from each participant's screen. Only the Top Provider can end a document sharing session.

How to Start a Whiteboard Session

When you start a whiteboard session, a whiteboard appears on each participant's computer screen. While in a whiteboard session, any participant can use the whiteboard tools to draw structured or free-hand objects on a shared screen. To dismiss the whiteboard, close it after (optionally) you save its contents. When you close the whiteboard, it disappears only from your computer screen; other participants can still see and participate in the whiteboard session. To re-enter an active whiteboard session at any time, click on the whiteboard button.

Only one whiteboard session may be open at a time. However, there can be a concurrent whiteboard and document sharing session.

**Note**

To whiteboard, you must list each participant in your public or personal directory with an entry in the "Associated PC" field. See ["Add a Directory Entry" section on page 3-32](#) for details.

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 whiteboard icon in the roster.

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

Step 3 Use the whiteboard tools to illustrate your ideas in the whiteboard window. Each meeting participant sees 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.

To limit control of the whiteboard, see the [“Remove Whiteboard Synchronization”](#) section on page 4-10.

Related Topics

- [Desktop Collaboration with Virtual Conference Room, page 1-7](#)
- [Whiteboarding, page 1-7](#)
- [How to Verify Settings, page 4-1](#)
- [End a Whiteboard Session, page 4-10](#)
- [Remove Whiteboard Synchronization, page 4-10](#)

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 them to save the 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, click the whiteboard button at any time to re-join the whiteboard session.

**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.

Remove Whiteboard Synchronization

Synchronization allows everyone to automatically view the same whiteboard page. By default, Cisco IP SoftPhone always selects synchronization when you first start a whiteboard session.

If you want to work on a page privately, you can remove synchronization so the page does not automatically display. Synchronization does not affect other participant's views of the current page. If you turn off synchronization and work on the current page, the other participants can view your actions.

Procedure



Step 1 Start a whiteboard session.

See [“How to Start a Whiteboard Session”](#) section on page 4-8.

Step 2 On the whiteboard screen, click **View > Synchronize**.

This removes the check mark next to “synchronization” that indicates it is active.

How to Send a Chat Message

The roster window includes a **chat** button that launches the Microsoft NetMeeting chat application. Use the chat application to send a message to all or selected meeting participants.

When someone sends you a chat message, the message appears in the Chat window. For example,

```
Jane Smith  
Are You Ready?
```

For details on how to customize the fonts, information display, and message format for the chat application, click the help menu in the chat window.

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.
- Step 3** 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 4** Click the **Send Message** button or press **Enter** on your keyboard to send the chat message.
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Related Topics

- [Chat, page 1-9](#)
- [How to Verify Settings, page 4-1](#)
- [How to Use the Roster, page 4-3](#)

How to Prepare for a Video Collaboration Session

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

Procedure



- Step 1** Click the **Settings** toolbar icon.
- Step 2** Click the **Advanced** tab.
- Step 3** Change the collaboration setting to NetMeeting.
- Step 4** Click **OK**.

You must 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 use the video collaboration features of NetMeeting.

Related Topics

- [Video Collaboration, page 1-9](#)
- [How to Verify Settings, page 4-1](#)