CollabraSuite BEA Edition®

User Guide

Version 5.1

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CollabraSuite BEA Edition

CollabraSuite BEA Edition offers a metaphorical representation of a physical workplace. The virtual environment is made up of rooms, which can be arranged into a virtual floor of unlimited rooms, thus allowing for the grouping of like rooms by functionality or other common means. The floors can then be arranged within a virtual building, and numerous buildings can be grouped to create a virtual campus. Within this campus and its encompassing buildings, floors, and rooms, users can communicate seamlessly. CollabraSuite BEA Edition provides a means of hosting private meetings, group communications, or seminar style conferences for an entire enterprise.

When a user logs into the CollabraSuite BEA Edition system, they are entering a virtual room where they can meet other users, chat with users, share documents, or participate in audio and/or video conversations. Not only can users collaborate with others in their current room, but presence awareness capabilities enable them to see users working in other virtual rooms. Users can instantly join other users in any room by simply clicking a button. As users move around the collaborative environment, they can bring their virtual briefcase with them—a portable folder filled with documents that only they can see. Documents in a user’s briefcase can easily be shared with other users by dropping a document into a room. In addition to storing private documents in a user’s briefcase, CollabraSuite BEA Edition provides the ability to store public documents in virtual file cabinets. These documents can then be viewed by users within the room the file cabinet is located.

The metaphorical representation of a physical workspace provided by CollabraSuite BEA Edition also offers security aspects of the physical environment. Strong security features make it possible to permit or deny access to all areas of the collaborative environment and its contents. Individual rooms can be locked with Access Control Lists (ACLs). Read and write ACLs control access to documents and folder stored in rooms as well. The CollabraSuite BEA Edition environment provides the flexibility and the security of the physical work environment, all while having the freedom to connect users in any location.

Visit www.collabraspace.com for more information on CollabraSpace and our products. For technical support, please email support@collabraspace.com.

Toolbar Options

CollabraSuite BEA Edition has a unique toolbar which provides easy one-click access to many collaborative features. Each icon will open a separate window with the information or function available. Users are able to see the function of each icon by mousing over the toolbar. Many components have additional toolbar functions with the same or different icons to aid in flexibility of use. The main toolbar includes the following icons:

Table 1-1 Toolbar Icons

Manual Scrolling	Manually control the room chatter display.
Idle	Alert other online users that you are user will be idle within the collaborative environment.
Lock Room	Lock or unlock the current room.
Mark Chat Messages	Highlight the room text that has already been read in the Text Chat area.
Whiteboard	Open the whiteboard to view the current session.
Chat	Access the Public Chat window.
Navigator	Display the Navigator.
Online Users	Display the users currently logged into the system.
Skill Search	Search for users by skill.
Room Occupants	View room occupants.
Page Viewer	View archived pages.
Briefcase	Launch the document navigator displaying the contents of the user briefcase.

File Cabinet	Launch the document navigator displaying the contents of the current room.
Audio Conference	Participate in an audio conference with other users in the same room.
Audio/Video Conference	Participate in an audio/video conference with other users in the same room.
Preferences Editor	Display the Preferences Editor.
Associates	Display the user's Associates.
User Information	Display detailed User Information on a selected user account.
Sidebar	Initiate a sidebar session with selected online user(s).
Send Page	Send a page to selected user(s).
Phone	Establish a point-to-point audio phone call to a selected user.
User Guide	Display this User Guide in a browser.

Enabling Popups

In many IT environments, web browsers are configured to block popups by default. Users will need to enable popups for sites containing CollabraSuite. JavaScript and Java Applets are technologies vital to CollabraSuite's functionality and should therefore be enabled within a browser.

Online Users

Within the collaborative environment, users may view and collaborate with other online users within their home campus, users who have access to their home campus, or users in any remote campuses to which they have access. Presences awareness features in the Online Users component allow users view and access collaboration features for other users in the same collaborative environment. Preferences may be set to provide audio alerts, view icons, and other information regarding other online users. An associates list may be set including users most often collaborated with to allow certain users to have different preferences. Users are also able to search for other users by skill.

Online Users Component

The Online Users component provides presence awareness features useful for determining where other users are located within the collaborative environment. The component displays each user that is logged into the environment as well as the room the user is currently in. User information is displayed in a table containing the user's name, home campus, and the campus, building, floor, and room where the user is located. The comment column displays a message indicating the user's idle status or personalized idle message. Additional features of the Online Users component include easy access to information about other users, joining another user, entering sidebar chats, paging, or phoning. Local users are also able to view any remote user who is logged into the home campus. For remote users, the Online Users component displays online users in every campus to which they are logged in. Remote users who are logged into one or more remote campuses may have several entries, one for each campus to which they are logged in. The user will have the location fields filled out only for the campus they are currently visiting. These fields will remain blank in the entry lines for the campuses this user is logged into but not currently located.

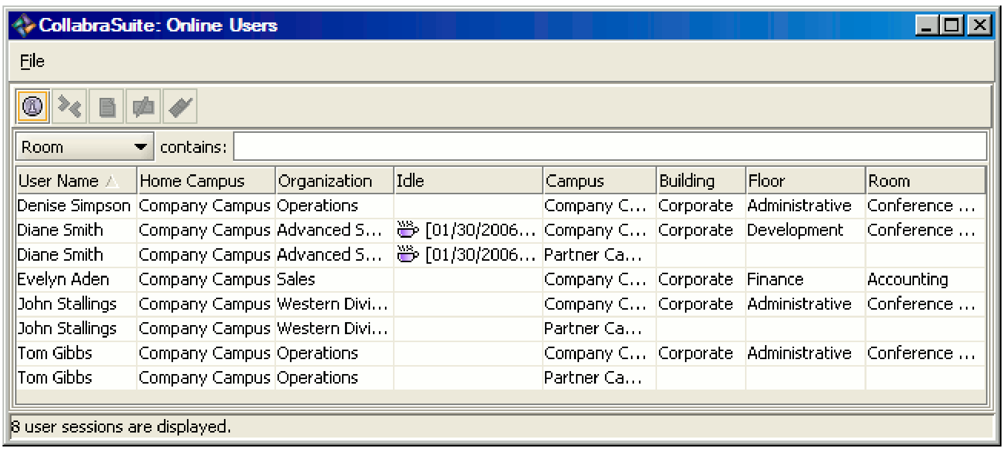
Details provided by the Online Users component include:

- User Name—The name of a specific user.
- Home Campus—The home campus of the user, regardless of the user's location.
- Organization—The organization the user belongs to.
- Idle—The current status of the user, which can be active or idle, and the time and the comment the user entered when they went idle.
- Campus—The specific campus, whether home or remote, where the user is located within the collaborative environment.
- Building—The specific building a user is in within the collaborative environment.
- Floor—The specific floor a user is in within the collaborative environment.
- Room—The specific room a user is in within the collaborative environment.

To access the Online Users component:

- Click the **Online Users icon** on the toolbar.

The Online Users window will appear.

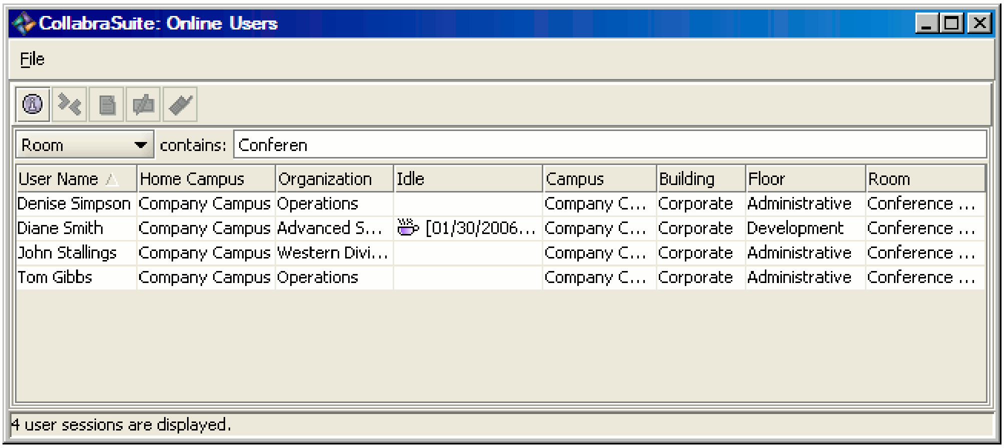


To sort the online users list:

- Select a column header. The list of users will be sorted in ascending order according to the selected column.
- To sort the list in descending order, select the same column header again.
- To sort by another column, simply select the appropriate column header.

To filter the online users list:

1. Select a column name from the filter type pull-down menu next to the contains field.
2. Enter your filter text in the **contains text field.** Only the entries that match the filter will be displayed.



Associates

While in the collaborative environment, users may view and come in contact with many other users. To aid in more efficient collaboration, users may set an associates list to include users who frequently collaborate with them, including users in accessible remote campuses. The Associates component allows users to view detailed presence awareness information about those associates. Additional icons are displayed beside each user indicating if the user is logged on, idle, in the room, or viewing the whiteboard.

Once the associates list has been set, users may set preferences for viewing associates in the collaborative environment by using the Associates tab of the Preferences Editor. Each user has the option of displaying user icons, or hiding the user icons for a more compact display. Users may also set audio alerts for when associates enter a room.

To set or update the associates list:

1. Click the **Associates icon**  on the toolbar. The Associates window will appear with associates icons displayed.

2. Right-click to access the context menu.

3. Select **Update Associates.** The Update Associates window will appear.

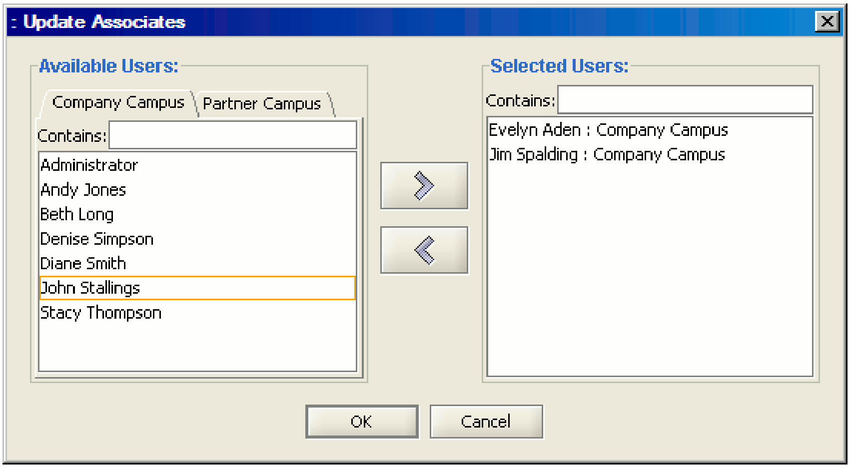
4. Search for a user by typing the name in the **Contains field** of the Available Users section.

5. Select the user or users to add to the associates list and click the **right arrow button.** The users in the **Selected Users** section will be added to the associates list. Remove users from the associates list by selecting from the **Selected Users** section and clicking the left arrow.

   Note: Accessible remote campuses will be displayed as tabs in the **Available Users/Groups** section. Click on the tabs to select users or groups from each campus and continue until all desired users or groups are displayed in the **Selected Users/Groups** list.

6. Click **OK** to set the associates list.

   Note: Additional features of the Associates component are accessing contact information on associates, initiating a sidebar conversation, and placing point-to-point phone calls. Right-click in the component to access these features.



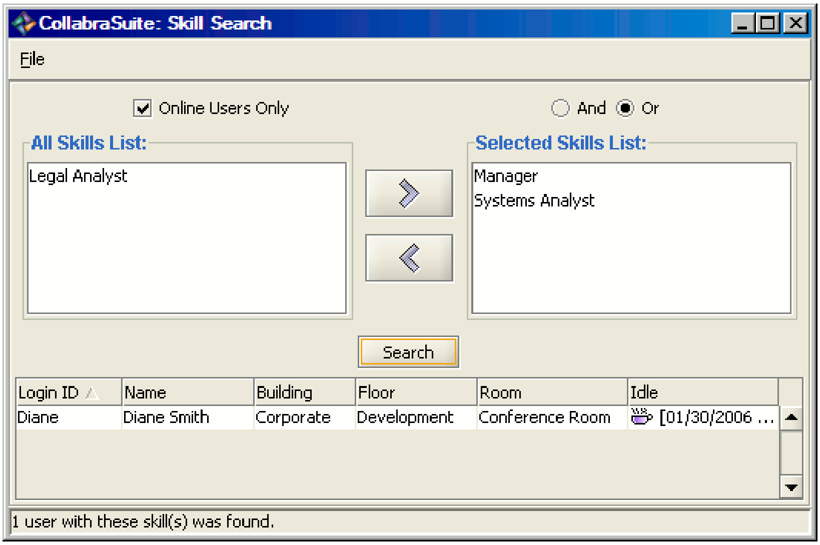
Skill Search

CollabraSuite BEA Edition skill mapping capabilities allow users to be mapped to a customized set of skills. The list of available skills is customizable at the campus level. Once skills are assigned to users, others can search for available personnel with a particular skill set. By enabling users to find others based on skill, this feature facilitates both knowledge sharing and problem solving.

To access the Skill Search window:

- Select the **Skill Search icon**  from the toolbar.

The Skill Search window will display.



To search for users with a particular skill set:

1. In the Skill Search window, highlight the desired skills in the **All Skills List.**
2. Click the **right arrow** to move the highlighted skills to the Selected Skills list.
3. Select the **Online Users Only checkbox** if the search should be limited to users that are currently online.
4. Select the **And radio button** to search for users that have all of the skills selected, or select the **Or radio button** for users that have one or more of the skills listed in the **Selected Skills** result set.
5. Click **Search** to begin the search. The search results table will display all of the users that match your criteria.

   Note: See the Online Users topic for actions that can be performed on users listed in the search results table.

Text Chat

The CollabraSuite BEA Edition Text Chat component enables users to collaborate using a variety of text based methods, including public chats, directed chats, sidebar chats, and pages. Public chats take place inside rooms, and are usually displayed automatically when a user enters a room. Any user in the room may view and participate in the text chat. Directed chats occur within the public text chat and allow users to direct their comments to other users while remaining visible to the entire chat session. Paging and Sidebar Sessions are mechanisms used to send instant messages to other users outside the context of a room chat. Sidebar chats may occur with both users inside and outside of the user's current room, and are visible only to users included in the sidebar session. Pages are used to send a light-weight email in real-time to users in or outside of a room which will pop-up on the recipient's screen.

All chat sessions and pages are recorded and archived so they can later be searched to provide a context for discussion history. Chat sessions are enriched by features such as priority tags, recalling chat sessions, locking rooms, accessing manual scrolling, marking read text, marking users as idle, URL links, and document links.

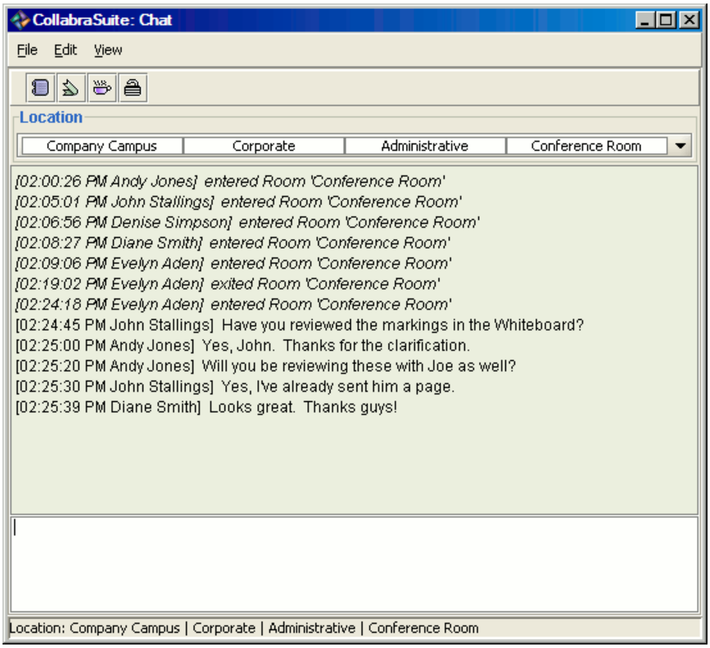
Access the Public Chat window

Usually, the Public Chat window is configured to display upon entry to a room, including the Chat Messages, Chat Input, and Room Occupant component. If the Chat window does not display upon entry in the room, a separate Chat window may be opened in order to display the public chat for that room.

To access the Public Chat window if it does not display upon entry:

- Click the **Chat icon**  on the toolbar.

The Chat window will display.



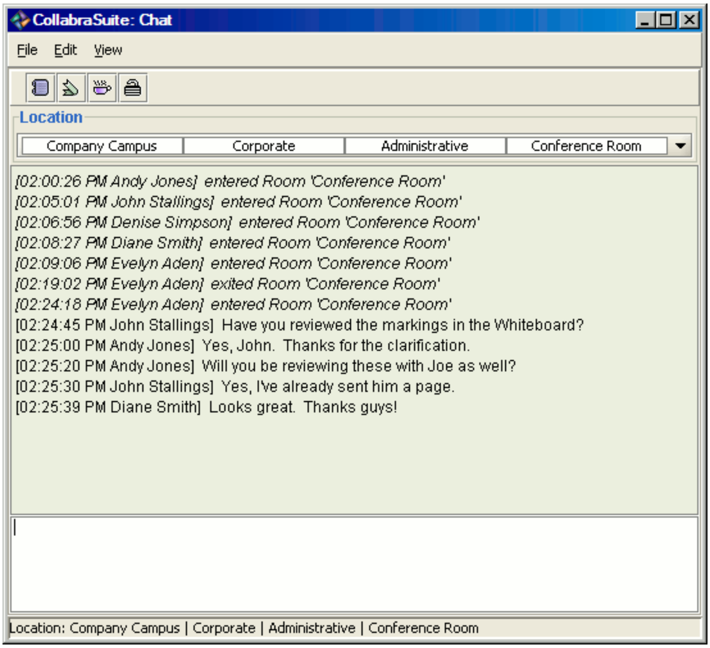
Initiate a Public Chat Session

Public chat sessions enable users to send instant chat messages to everyone in a room simultaneously. When users enter a room, the chat session is usually displayed with the current chat displayed in the Chat Messages field. Every message sent during the session may be viewed by any user in the room no matter when that user enters the room.

To initiate a public chat session:

1. Click the **Chat icon** in the toolbar if the Public Chat window is not displayed.
2. Enter a text message in the **Chat Input field**, located under the Chat Messages field.
3. Press the **enter key.**

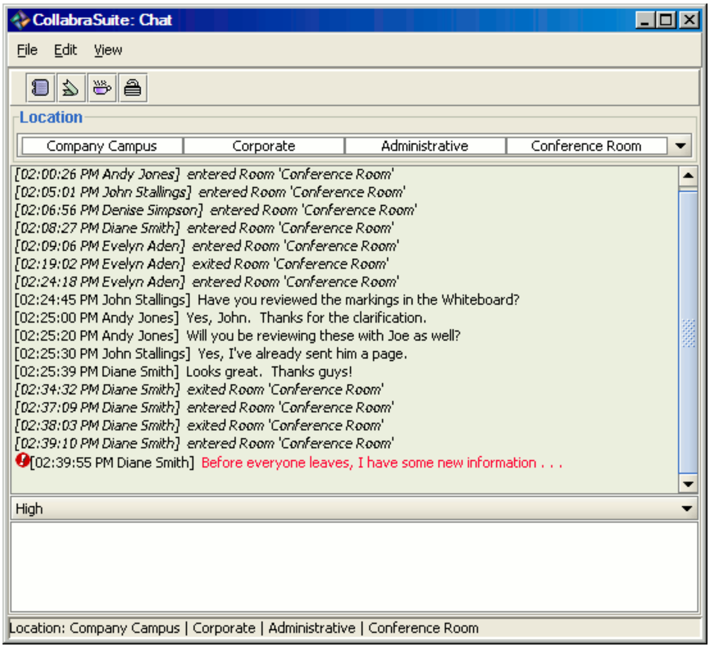
Your message will display in the chat messages field with a time/name stamp displayed before the message. As other room occupants respond, all messages will display in the chat window.



Chat Priorities

If enabled, messages in the public room chat may be marked for priority. This enables users to mark, view, and filter messages by importance. Each user may assign a priority to each message. When in a room on a remote campus, the priorities available in the chat input window will be the priorities of the remote campus. Messages marked for priority will be displayed in the Chat Messages field with a priority icon. Default colors for the priority icon are red for high priority, orange for medium priority, and green for low priority. If no priority has been selected for the message, no icon will display. Priority chat text colors can be customized in the Chat Monitor tab of the Preferences Editor.

Users may select to filter messages to show all, low priority, medium priority, or high priority messages. When first entering the chat room, all messages, whether marked for priority or not, will be displayed in the chat field. Filtering by low priority will show all messages marked with a priority, whether low, medium, or high. A medium priority filter will display both medium and high priority messages. Filtering by high priority will only show high priority messages.



To assign a priority to a message:

1. Select a priority level from the priority drop-down list in the Chat Input section of the window.
2. Type the priority message in the **Chat Input field.**
3. Press the **enter key.**

The message will be displayed in the Chat Messages field with a priority marker.

To filter by priority:

1. Right-click in the **Chat Messages field.**
2. Select **Show Priority** from the menu.
3. Select the level of priority from the **Show Priority menu.**

Only messages with priorities equal to or higher than the priority specified in the filter will be displayed in the Chat Messages field.

Chat Session Information

Each session automatically saves once all users have exited the room. Chat sessions are saved using the default information available including the room, start date and time, and end date and time. More detailed information, including a session name and description, may be added by a user to aid in recalling or searching chat sessions.

To assign detailed session information:

1. Right-click on the Chat Message field to access the context menu and select **Session Information.**
2. Enter name and description information in the appropriate fields.
3. Click **Apply.**

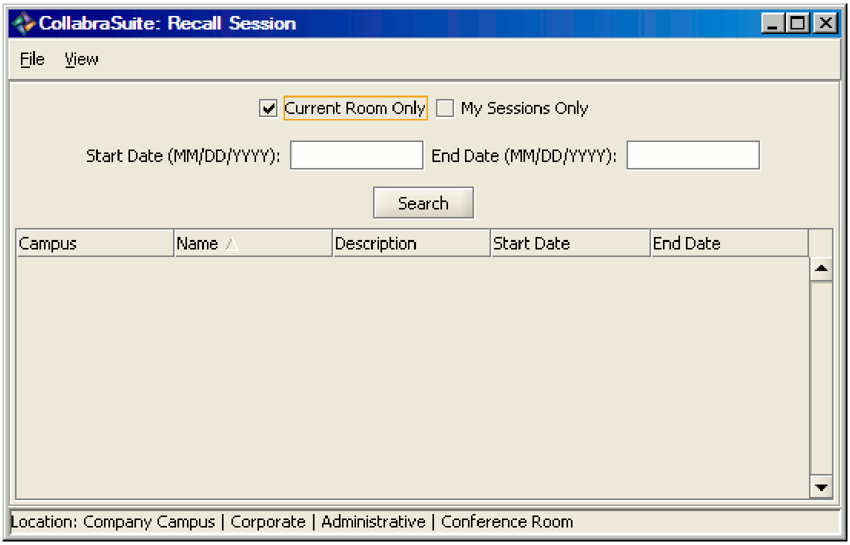
Recall Chat Session Information

Each session is automatically saved once all users have exited the room and may be recalled. This also includes sidebar sessions. Users with remote campus access may recall chat sessions across multiple campuses. Chat sessions are saved using the default information including the campus, room, start date and time, and end date and time. More detailed information, including a session name and description, may have been added.

To recall a closed chat session:

1. Open the **Chat window.**
2. Right-click in the **Chat Messages field**.

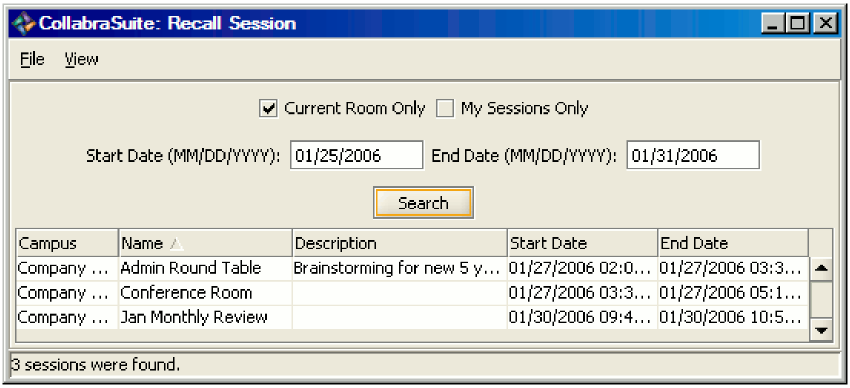
3. Select **Recall Session.** The Recall Session window will appear.



4. Select your search criteria from the following options: **Current Room, My Sessions Only, Start Date**, and **End Date**.

Note: You can use as many or as few search criteria as desired. To retrieve sidebar sessions, uncheck **Current Room Only** and check **My Sessions Only.**

5. Click **Search.** A list of sessions based on your criteria will display.



6. Double-click on the field with the desired session to open that session in a new chat window.

Note: Recalled sessions are read-only. Users can not post new chat messages to these sessions.

Locking and Unlocking Rooms

Locking a room blocks new users from entering a room so a discussion may be limited to the current occupants. However, the room lock feature does not keep locked session details private. Once a room is unlocked the chat messages are available and can be viewed by anyone with access to the room. A room can be locked by one user and unlocked by another. All room occupants have the ability to lock or unlock at any time. Some rooms may have had the lock/unlock feature disabled by a campus administrator.

To lock a room:

- Select the **Lock Room icon** from the toolbar.

  Or

- Right-click in the Chat Messages field to access the context menu and select **Lock Room.**

A Room Locked message will display with your time/name stamp in the Chat Messages field.

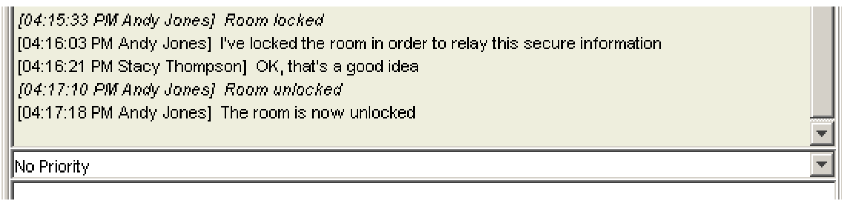
To unlock a room:

- Select the **Lock Room icon** again

  Or

- Right-click and select **Unlock** Room from the context menu.

A Room Unlocked message will display with your time/name stamp in the Chat Messages field.



Manual Scrolling

The chat message field scrolls as new entries are added by room occupants. In a public chat with many users, this can scroll quickly. Manual scrolling enables you to control scrolling and read each entry at your own convenience. This also allows users to review discussions held prior to entering the room.

To enable manual scrolling:

- Select the **Manual Scrolling icon**  from the toolbar.

  Or

- Right-click in the **Chat Messages field** to access the context menu and select Manual Scrolling.

  Or

- Move the scroll bar up to view previous chat messages.

The Chat Messages field will no longer automatically scroll to display new chat messages.

To disable manual scrolling:

- Select the **Manual Scrolling icon**  again from the toolbar.

  Or

- Right-click in the Chat Messages field to access the context menu and select **Manual Scrolling.**

  Or

- Move the scroll bar to the bottom to view the latest chat messages.

The Chat Messages field will begin to automatically scroll as new chat messages arrive.

Idle

To step away from a room without having to exit the room, users can set an idle message to notify other room occupants that they are inactive or not currently available. Idle messages can be personalized to identify idle status more specifically by using the Chat Monitor tab on the Preferences Editor. If users take certain actions in CollabraSuite BEA Edition, such as changing rooms or posting a chat message, they will be changed from idle to active status automatically.

To change status to idle:

- Select the **Idle icon** from the toolbar.

  Or

- Right-click in the Chat Messages field to access the context menu and select **Idle.**

Your idle message will display with your time/name stamp in the Chat Messages field.

To change status to active:

- Select the **Idle icon** again from the toolbar.

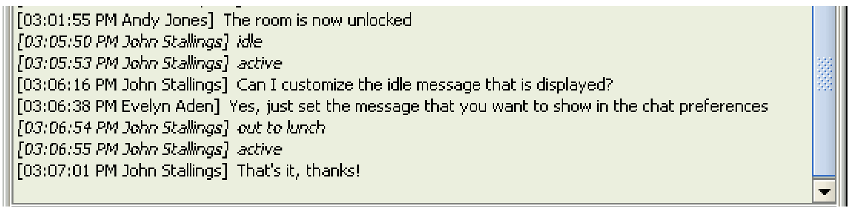
  Or

- Right-click in the Chat Messages field to access the context menu and select **Idle**

  Or

- Take action within CollabraSuite, such as sending a chat message

An active message will display with your time/name stamp in the Chat Messages field.



Mark Current Chat Messages

Chat messages may get lengthy with multiple users contributing at a rapid pace. To easily keep track of what you had read and pick up on the most recent room messages, you can highlight all messages currently displayed in the chat messages field.

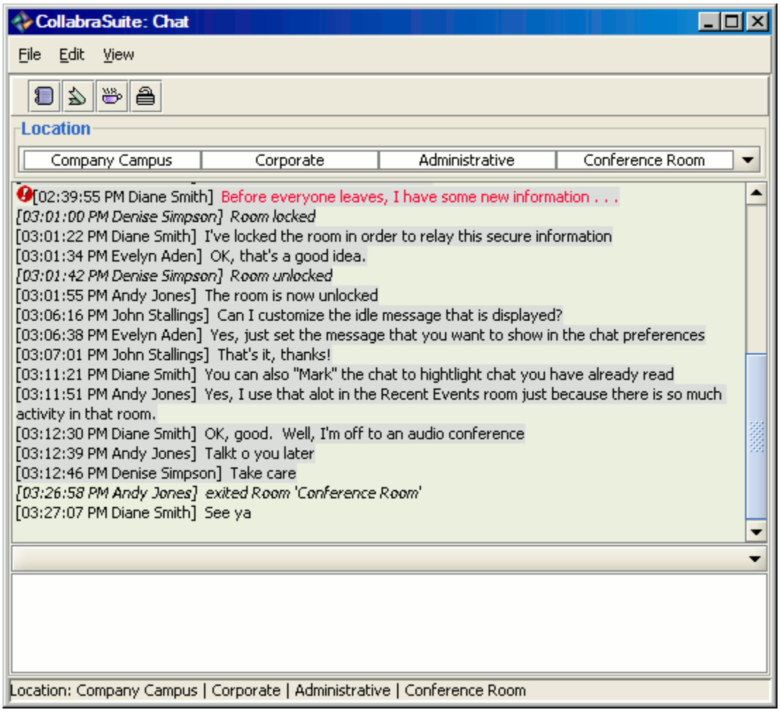
To mark current chat messages:

- Select the **Mark Chat Messages icon** from the toolbar.

Or

- Right-click in the Chat Messages field to access the context menu and select **Mark Current Chat Messages.**

All message current displayed in the Chat messaged field will be highlighted. New messages will display below the highlighted block.



URL Link

Users may direct other users to a specific URL by adding a URL link to the chat session. Typing in a URL will create a link in the chat monitor which will be accessible to any users within the room or sidebar. Users may also drag and drop a URL from a browser into the chat input field which will also create a link on the recipient's end. Clicking on these links will open a new browser with the URL displayed.

To send a URL link within a room:

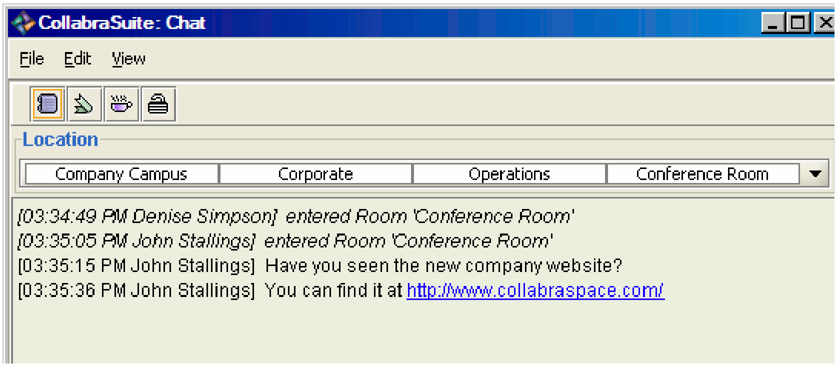
1. Enter a URL (web address) in the **Chat Input field.** The URL must be fully qualified such as http://host/page.html

   Or

   Open a browser with the URL displayed, click on the URL and drag the mouse into the **Chat Input field.**

2. Press the enter key.

A URL link will be displayed in the chat session.



Document Link

Documents may be shared inside a chat session through a document link. Adding a document link to a chat will enable users to view or edit documents without having to move themselves to the document location. Users can drag and drop a document from a file cabinet or briefcase into the chat creating a link which can be used to both access a read-only copy or to edit the document.

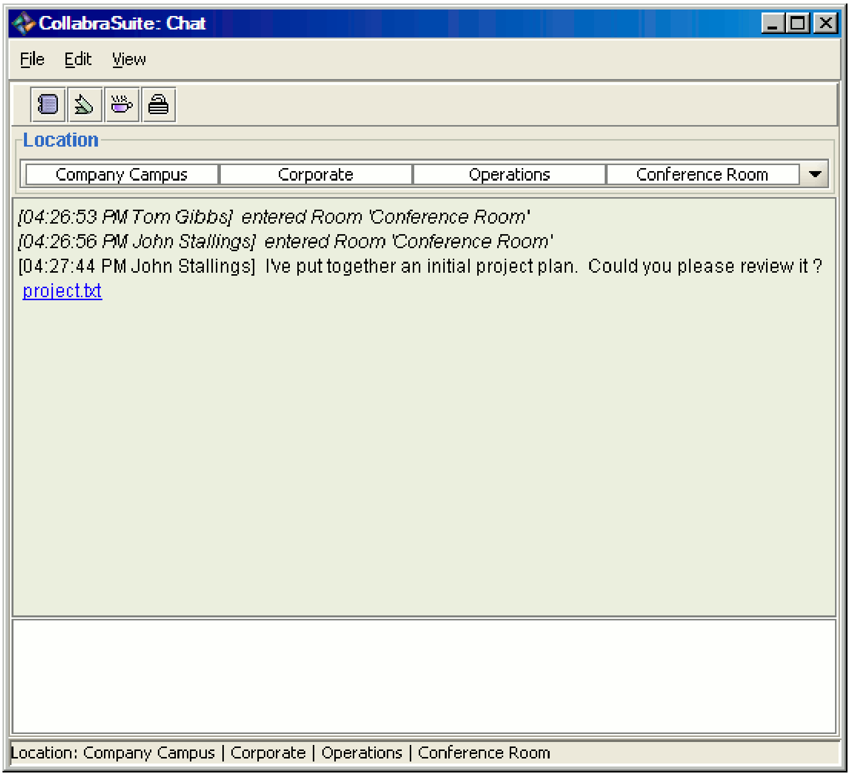
To send a document link:

1. Click on the document you wish to share in the **File Cabinet** or **Briefcase.**

2. Drag the document into the **Chat Input field.**

3. Press the **enter key.**

A link will appear in the Chat Messages field.



To access a read-only copy of the document:

- **Left-click** on the document link in the Chat Messages field.

The document will open on your desktop.

To edit a document using a document link:

1. **Right-click** on the document link in the Chat Messages field. A Show in File Cabinet selection will appear.
2. Click on the **Show in File Cabinet** selection. The File Cabinet Navigator will appear with the document highlighted.
3. Right-click on the document to view the **context menu.**
4. Select **Document** > **Edit** to use the default application for your system or select **Document** > **Edit With** to select an application for editing the document.

The document will display using the appropriate application for the document type or the selected application. An Informational Dialog window will display to notify you that an external application is being used to edit this document.

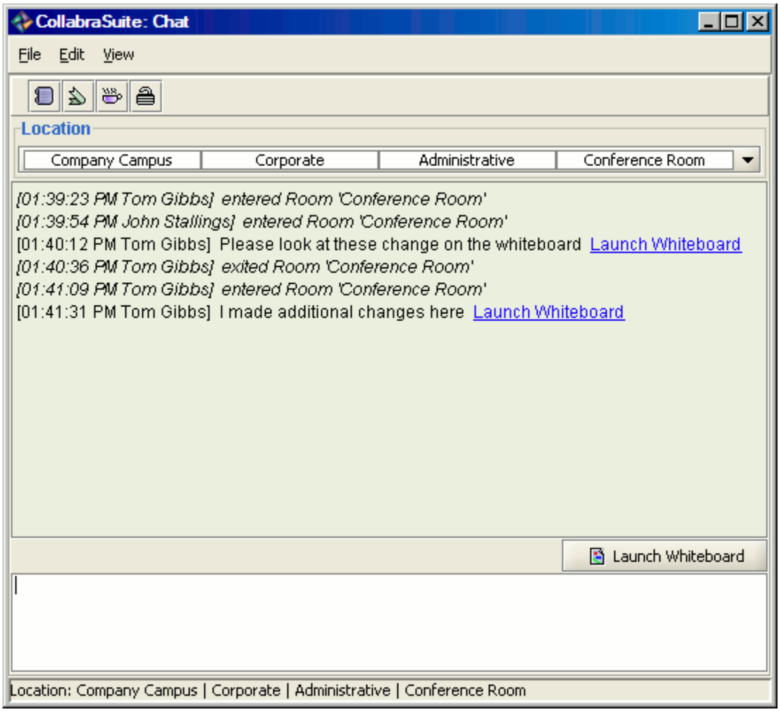
Whiteboard Link

The whiteboard allows users to view a canvas that may contain graphics, text, and freehand images. If enabled, the whiteboard link feature is used to create a link in a chat session that may be used to enter a whiteboard session.

To create a whiteboard link:

1. Click the **Launch Whiteboard button** located above the chat input field or next to the directed chat field, if enabled. Text will appear in the Chat Input field which will be used to create the link in the Chat Messages field.
2. Press the **enter key.**

A link will appear in the Chat Messages field. Users in the session may click on the link to launch the whiteboard session.



Directed Chat

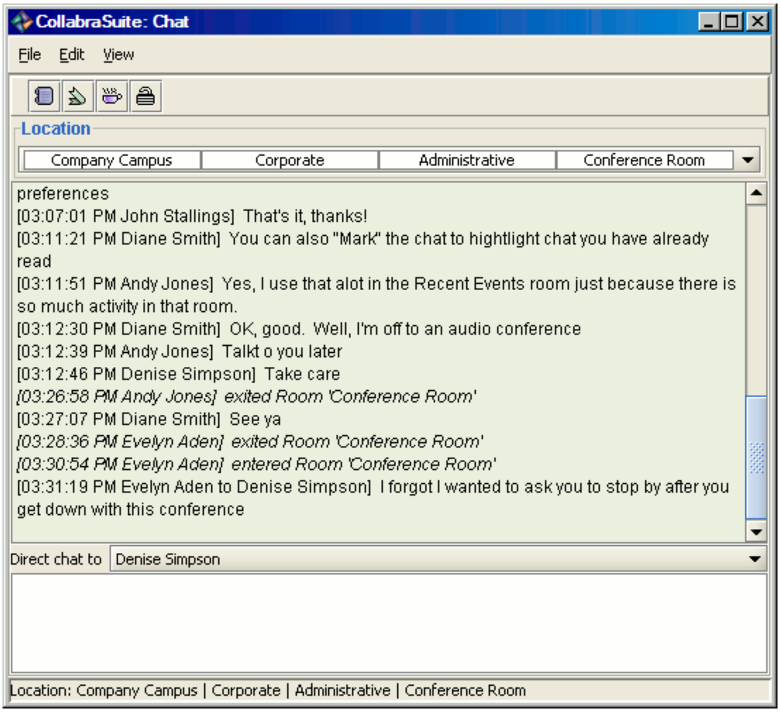
If enabled, CollabraSuite BEA Edition directed chat capabilities provide a way for users to direct their chat messages to specific users during a public chat session.

To send a directed chat:

1. Select the intended recipient from the **"Direct Chat to" pull down menu** located above the Chat Input field.

2. Type the message you wish to send and press the **enter key.**

The message will display in the chat window with the time/sender, user name/recipient stamp. Directed chat is seen by all users in the session.



Sidebar Session

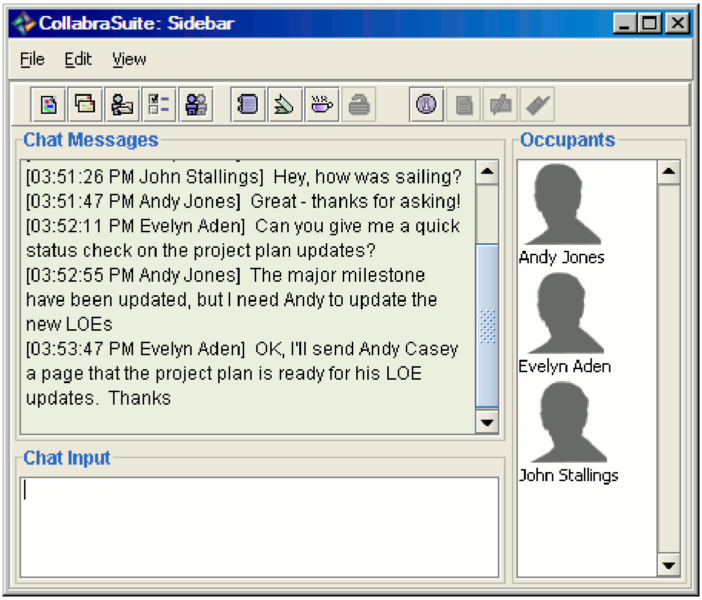
Sidebar chats provide the capability to send instant messages to a set of selected users in real-time using the CollabraSuite BEA Edition text chat component separately from the public room chat. Sidebar sessions may include users within a current room or users in other locations in the CollabraSuite BEA Edition environment, including any remote campuses to which the initiating user is logged in. Idle users may not be included in a sidebar. Document links and URL links may be used in a sidebar session the same way they are used in a room chat. Additionally, the sidebar can include a whiteboard session viewable only to those in the session. The sidebar session can be later recalled just like room sessions. Any other features of a room chat session, such as manual scrolling, marking chats, or document links, are available in sidebar sessions as well.

To initiate a Sidebar Chat:

1. Select one or more users from lists provided by components such as the Online Users component, Room Occupants component or the Skill Search component.

2. Right-click to display the context menu and select **Sidebar** or select the **Sidebar icon**  located on the right-hand side of the toolbar. The Sidebar Chat window will display, including the selected users.

3. Begin the text chat session by typing text in the **Chat Input area** of the window and pressing the **enter key.**



To exit a Sidebar Chat:

- Close the Sidebar Chat window to exit the Sidebar Chat session.

CHAPTER 5

Pages

The CollabraSuite BEA Edition Paging component enables users to collaborate using a lightweight instant email to both online and off-line users in both a user's home campus, and any remote campuses to which the user has access. The paging feature is also used to report document and folder changes to Document Subscribers. Document links may be added to pages to allow access to the document directly from the page. Document subscribers receive a document link in the page notification updating them on document changes.

Users can be notified via an additional page when recipients view their sent page by checking the "Return Receipt" box when composing a page. The return receipt page is indicated by the "Response" column in the page viewer.

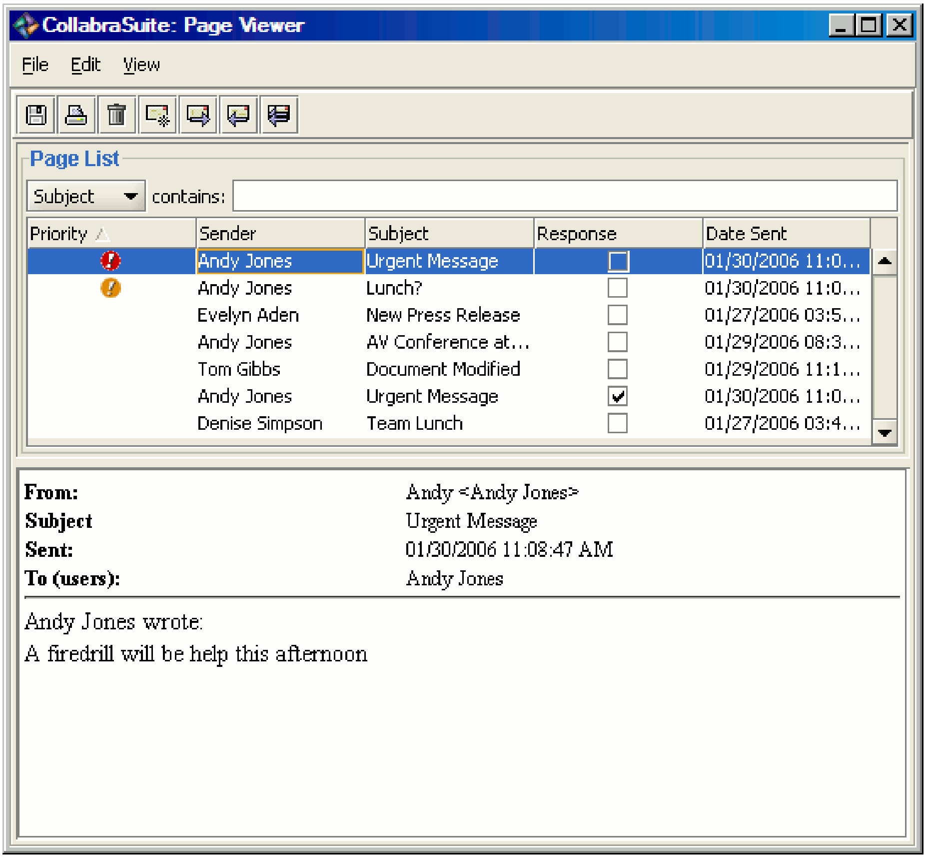
Users can choose to have pages forwarded to their email account whenever they are off-line. This preference can be set in the User Information component.

View a Page

The Page Viewer component allows users to view received pages and information about each page, including the date sent and if there was a response. Users are able to forward or reply to pages, or create new pages from the Page Viewer window. Pages may be filtered by Sender, Subject, Response, or Date Sent.

To access the Page Viewer window:

- Select the **Page Viewer icon** from the toolbar. The Page View window will display.



To sort pages by column header:

1. Select a column header—**Priority, Sender, Subject, Response,** or **Date Sent.** The list of pages will be sorted in ascending order according to the selected column.

2. To sort the list in descending order, select the same column header again.

3. To sort by another column, simply select the appropriate column header.

To filter pages by search word or category:

1. Select a category from the pull-down list: **Sender, Subject, Response, or Date Sent.**

2. Type a search word in the **contains text field.**

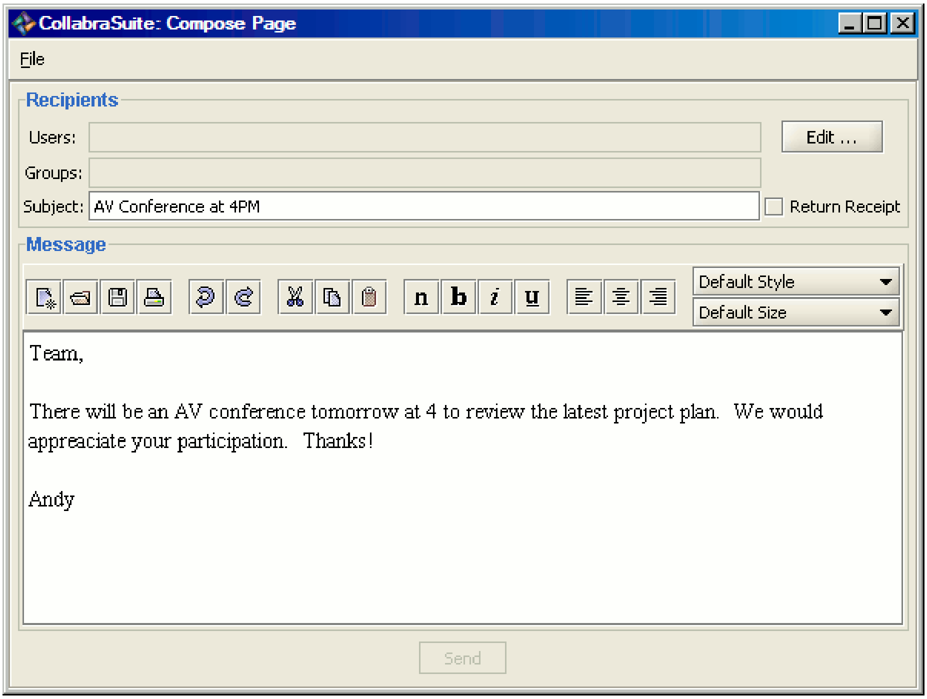
The **Page List** will be filtered according to the sender, subject, response, or dates that match your query.

Sending a Page

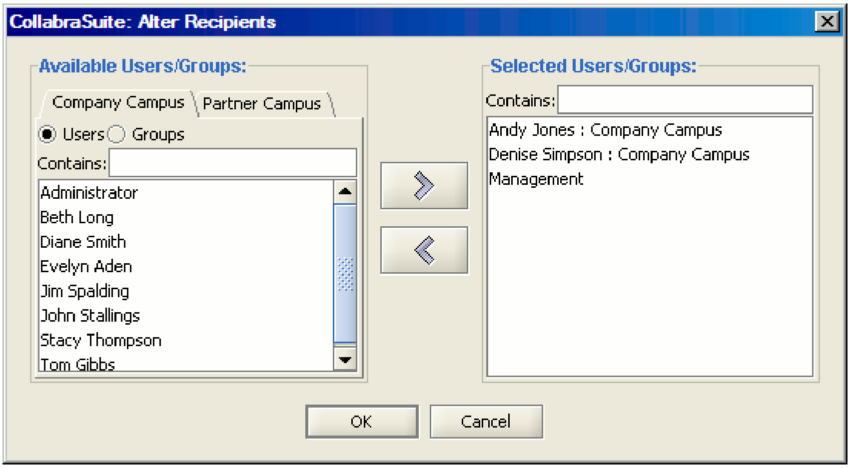
Users may send pages by using the Page Composer component. Pages may be sent to one user, several users, or groups in a home campus or any remote campuses to which the sender has access. The Page Composer component may be accessed through the toolbar, the Page Viewer window, or by right-clicking users to access the context menu.

To send a page:

1. Select the **Send Page icon** from the toolbar or the context menu, or select the **Compose Page icon** from the Page Viewer toolbar. The Page Composer will display.



2. Click the **Edit Recipients button** to modify the recipients for the page. The Alter Recipients window will display.



3. Highlight the users and groups you wish to page in the **Available Users/Groups list.**

4. Click the **right arrow button** to move the selected user or group to the **Selected Users/Groups** field.

   Note: Accessible remote campuses will be displayed as tabs in the **Available Users/Groups** section. Click on the tabs to select users or groups from each campus and continue until all desired users or groups are displayed in the **Selected Users/Groups** list.

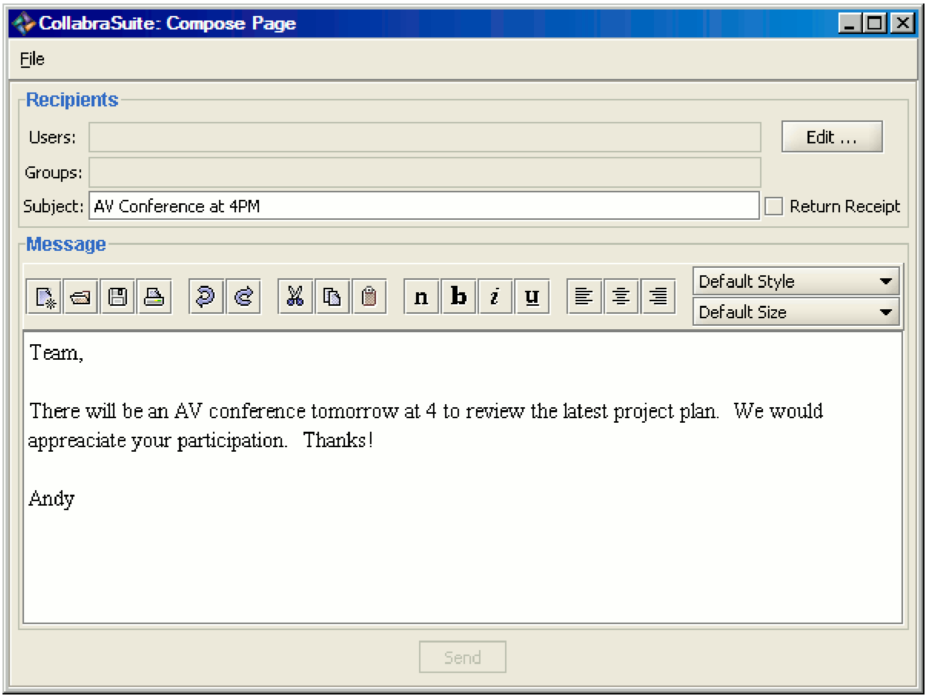
5. Click **OK** to close the Alter Recipients window. The recipients will now show in the Recipients field.

6. Select the **Return Receipt** option to receive a notification when the recipient(s) select the page in the Page Viewer window.

7. If enabled, select the priority to be associated with the page. The default value is no priority.

8. Type the subject of the page in the **Subject** text field.

9. Type the message in the **Message** field and use the toolbar options to change font size, font type, and text alignment as desired.



10. Click the **Send** button to send the message to the intended recipients.

To reply to a page:

1. Select a page from the list of received pages.
2. Select the **Reply icon**  . The Page Composer window will display with the sender listed as the recipient for the page and the text from the received page displayed.
3. Type an appropriate message and send the page.

To reply to the sender and all recipients of a page:

1. Select a page from the list of received pages.
2. Select the **Reply to All icon**  . The Page Composer window will display with all of the users and groups listed in the recipients field and the text from the received page displayed.
3. Type an appropriate message and send the page.

To forward a page to another user or group:

1. Select a page from the list of received pages.
2. Select the **Forward Page icon**  . The Page Composer window will display with the text from the received page displayed.
3. Select the user(s) or groups to forward the page to
4. Add an additional message if desired and send the page.

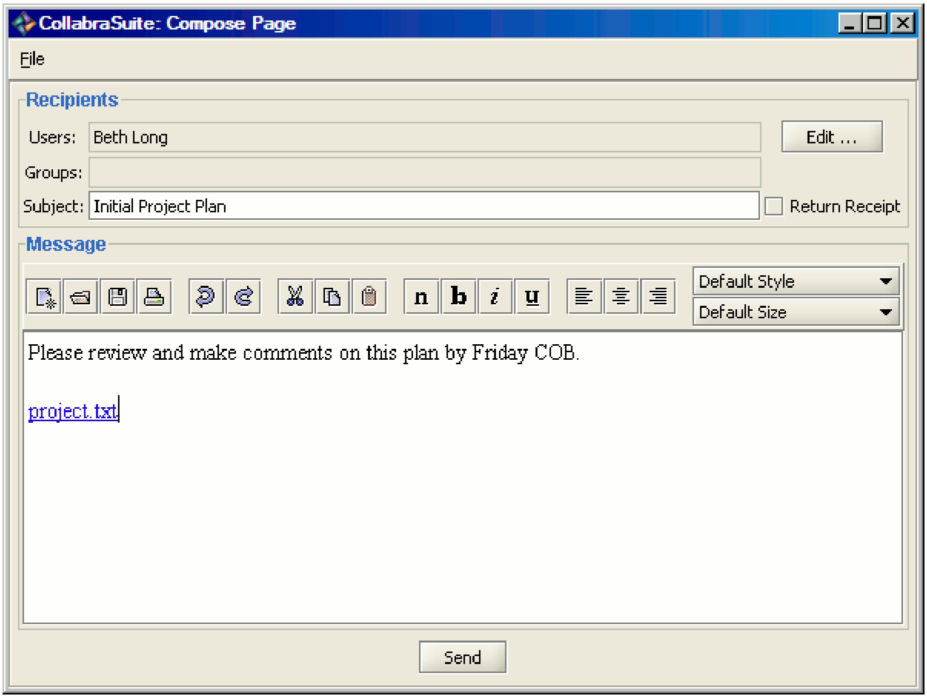
Adding a Document Link to a Page

Document links are added to a page to enable users to view or edit documents without having to move themselves to the document location. Users can drag and drop a document from a file cabinet into the page creating a link which can be used to both access a read-only copy or to edit the document.

To add a document link to a page:

1. Open the page composer with the recipients you wish to page in the Users field.
2. Click on the document you wish to share in the **File Cabinet** or **Briefcase.**
3. Drag the document into the **Message field** of the Compose Page window.
4. Add any text or a subject to the page and press the **Send button.**

A link will appear in the page when it is received.



To access a read-only copy of the document:

- **Left-click** on the document link in the Chat Messages field.

The document will open on your desktop.

To edit a document using a document link:

1. **Right-click** on the document link in the Chat Messages field. A **Show in File Cabinet** selection will appear.
2. Select **Show in File Cabinet.** The File Cabinet Navigator will appear with the document highlighted.
3. Right-click on the document to view the **context menu.**
4. Select **Document > Edit** to use the default application for your system or select **Document > Edit With** to select an application for editing the document.

The document will display using the appropriate application for the document type or the selected application. An Informational Dialog window will display to notify you that an external application is being used to edit this document.

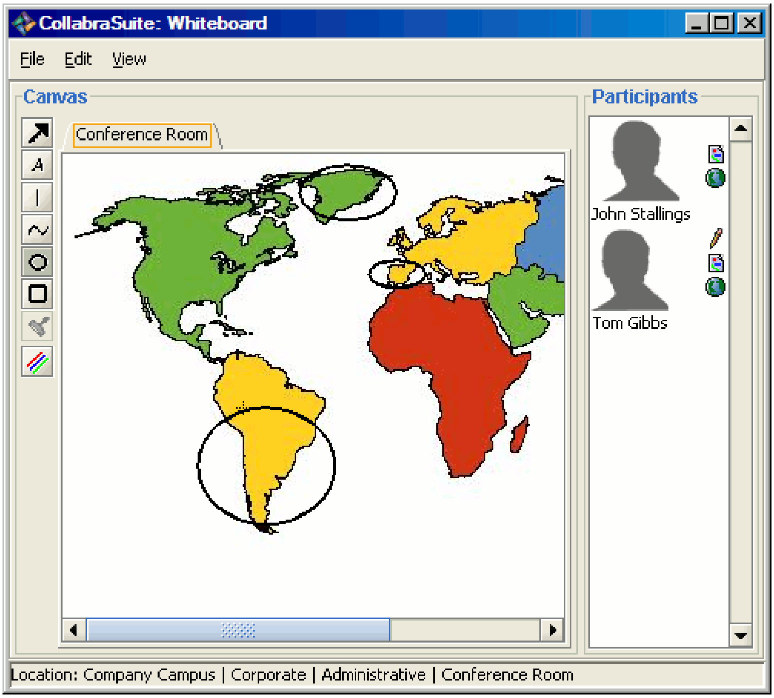
Whiteboard

The CollabraSuite BEA Edition Whiteboard component is a multi-user interactive tool that allows users to review, create, and update graphic information in real-time. Presence awareness mechanisms make it possible to differentiate participants and their annotations. Additionally, visual displays indicate the level of a user's participation in the whiteboard session including a date/time/user stamp for each annotation to easily identify the author. Whiteboards can have tabs allowing users to switch between multiple views in a single session. The whiteboard background can easily be changed to display a variety of color-coded graphical data. Whiteboard backgrounds can consist of images and HTML web pages. Users can cut, paste, and delete annotations and backgrounds. Users can select all annotations and hide all annotations by user. All whiteboard activity is recorded in the database and may be searched for repeated use or as a context for discussion history.

To access the whiteboard:

- Select the **Whiteboard icon**  from the toolbar.

The Whiteboard window will display.



Whiteboard Backgrounds

Whiteboard backgrounds allow several users to view and annotate graphics, web pages, photographs, and near real-time images. Once a background is in place, users can add annotations and communicate information directly over the background. All users viewing the whiteboard can add, change, or clear the backgrounds.

To add or change your background:

1. Select **View** > **Background** > **Change Background** or drag and drop a file from your desktop into the whiteboard area. The Select Whiteboard Background screen will appear.
2. Type in a URL to use a website as a background or select **Choose File** to retrieve an image.
3. To preview the chosen image, select the **Preview button.**
4. Select **Use Full Image** or **Use Cropped Image.**
   a. **Use Cropped Image** will display only the image you see in the preview window.

b. **Use Full Image** will import the image full size (using scroll bars if necessary).

To clear the existing background:

- Select **View** > **Background** > **Clear Background.**

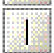
Whiteboard Annotations

Whiteboard annotation features make it possible for each user to add annotations to the whiteboard. User information is added to the annotations, including the user name and time of annotation, in order to allow users differentiate participants and their annotations. This enables all users in the room to see who has worked on the whiteboard and the changes each user makes. To view user information, users may mouse-over various shapes and text that were added to the whiteboard.

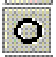
Users may add annotations including shapes, text, stamps, and colors by using the drawing tools found on the left side of the whiteboard.

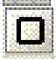
 The select tool is used to select and manipulate existing annotations.

 The text tool creates a text line in the whiteboard.

 The line tool creates straight lines.

 The freehand tool creates drawn lines in any shape.

 The ellipse tool creates any size or shape of ellipse.

 The rectangle tool creates any size or shape of rectangle.

 The stamp tool may be configured to add a graphic stamp to the whiteboard.

 The line color tool allows users to choose the color of each annotation, text, shape, or line.

Whiteboard Tabs

Users may create a new whiteboard within a session without deleting an existing whiteboard by simply adding a new tab. When the session is recalled, all tabs will be viewable. During the session, users may switch back and forth between tabs in order to see all canvasses without having to clear the existing whiteboard and starting a new one. Tabs may also be cleared from the session without deleting an entire session.

To add a new tab:

- Select **View** > **Tab**> **Add tab.**

To clear a tab:

1. Select the tab you want to clear.
2. Select **View** > **Tab** > **Clear Tab.**

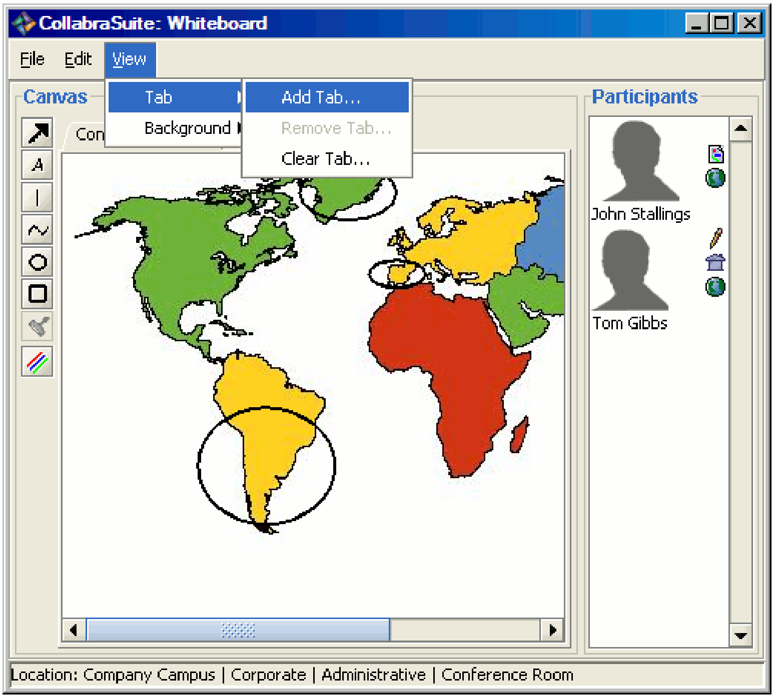
The contents of the canvas will be deleted but the tab will remain.

To remove a tab from a session:

1. Select the tab to remove.
2. Select **View** > **Tab** > **Remove Tab.**

The tab will be removed from the session while any other tabs will remain.

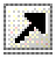
Note: See clear session to delete an entire session whiteboard.



Edit a Whiteboard Canvas

Users can cut, copy, paste, or delete a single annotation from an open canvas using the edit menu. This allows users to copy, move, or clear only desired material from the canvas without erasing all annotations or clearing the whiteboard.

To delete an item from the canvas:

1. Select the **arrow icon**  from the drawing toolbar.
2. Click to select the item on the canvas you want to delete.
3. Right-click and select **Edit** > **Delete.** The item will be removed from the canvas

To cut, copy, or paste items on the whiteboard:

- Follow the directions for deleting items but select the cut, copy, or paste from the Edit menu.

To select multiple items on a whiteboard:

- Press and hold the **ctrl key** on the keyboard while selecting each item.

To un-selected items:

- Right-click and select **Select** > **None.**

To invert your selections (switch all selected items for all unselected items):

- Right-click and select **Select** > **Invert.**

To select all items on a whiteboard at once:

- Right-click and select **Select** > **All.**

View Whiteboard Users

During a whiteboard session, user icons display in a users panel. Each user in the session will be represented by the icon they have selected for themselves, and additional icons next to each user will define each user's status in the room. These icons will indicate if the users have participated in the session, are viewing the whiteboard, are currently in the same room, or have made annotations to the canvas. Users appear in this list if they are currently viewing the whiteboard or have made annotations during the history of this whiteboard session.

-  Annotation icon: User has made annotations to the canvas. (To view specific annotations by user, roll your mouse over the canvas.)
-  View icon: User is currently in the same room and viewing the Whiteboard.
-  Room icon: User is currently in the same room.
-  Online icon: User is currently online.
-  A/V icon: User is actively transmitting in an Audio/Video session.
-  A/V icon: User is passively participating in an Audio/Video session.

Save Whiteboard Session Information

The whiteboard session saves automatically once all users have exited the room. Whiteboard sessions are saved using the default information available including the room, start date/time, and end date/time. However, more detailed session information, including a session name and description, may be added in order to aid in recalling and searching whiteboard sessions.

To assign more detailed session information:

1. Right-click on the canvas to access the context menu.
2. Select **Session Information.**
3. Enter name and description information in the appropriate fields.
4. Click **Apply.**

Clear a Whiteboard Session

Every whiteboard session is saved once the session has been closed. However, if users would like the contents of a whiteboard permanently erased, they may clear the contents of the whiteboard before closing it. To start a new session without clearing the contents of the current whiteboard, users may close the current whiteboard or open a tab. Clearing the whiteboard will clear the contents of the current session and start a new session.

To clear the contents of the whiteboard:

- Select **File >Clear** Session from the menu bar.

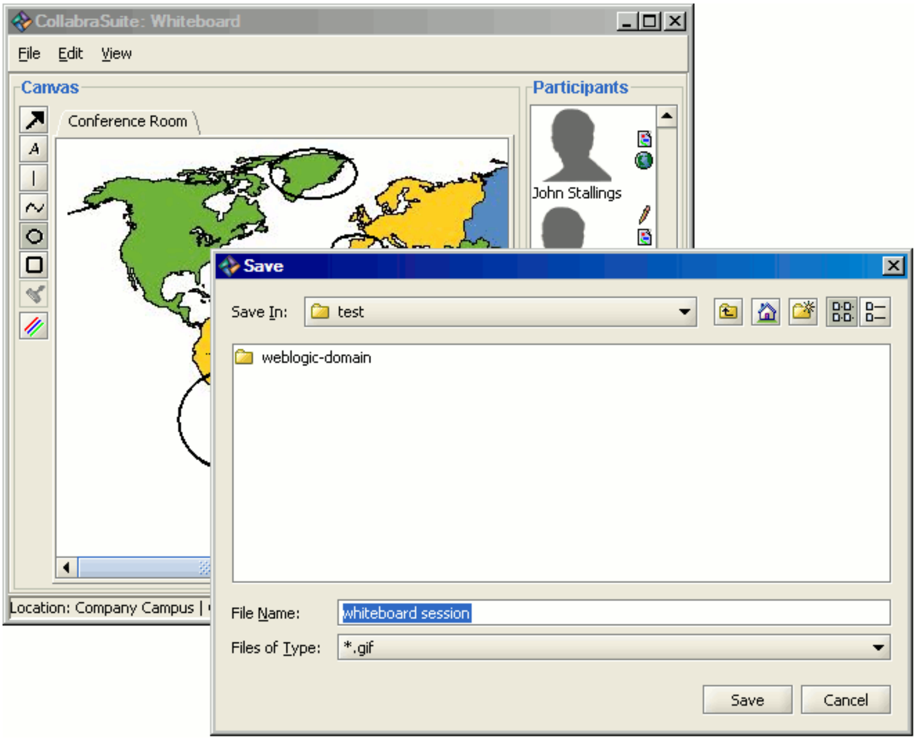
The contents of the canvas will be deleted and cannot be retrieved.

Save a Whiteboard as an Image

You may want to save and export a whiteboard as an image for use outside of the room or as a background for a new whiteboard.

To save and export a whiteboard as an image:

1. Right-click and select **Save As** > **Gif Image** (or JPG Image). A Save window will appear.



2. Enter a file name and select a location for the file to be saved.

3. Click **Save.**

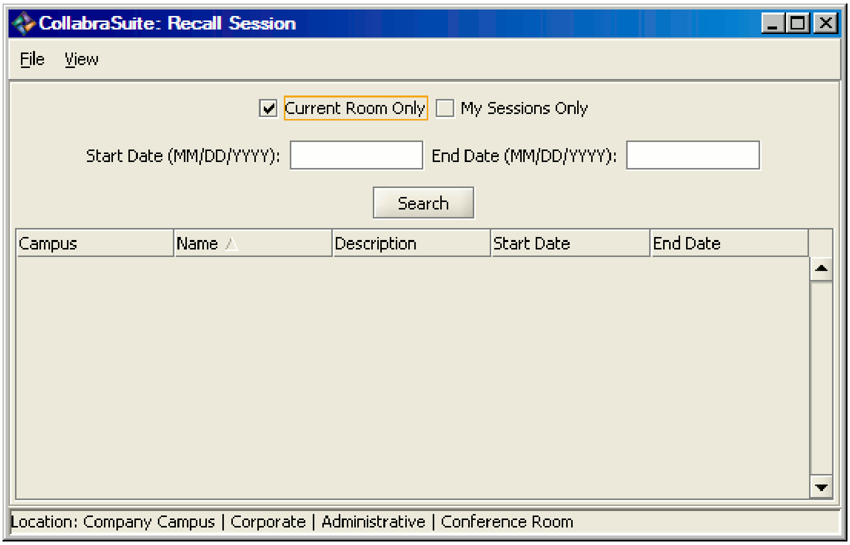
   Note: Once saved, a whiteboard image can be retrieved and used as a background in a new whiteboard using the Change Background feature. A saved image may also be printed.

Recall Whiteboard Session Information

When a whiteboard session is closed, it is saved and may be recalled. Users with remote campus access may recall whiteboard sessions across multiple campuses. Whiteboard sessions are saved using the default information including the campus, start date and time, and end date and time. More detailed information, including a session name and description, may have been added. When a whiteboard session is recalled, users will see the state of the whiteboard at the end of the session.

To recall a closed Whiteboard session:

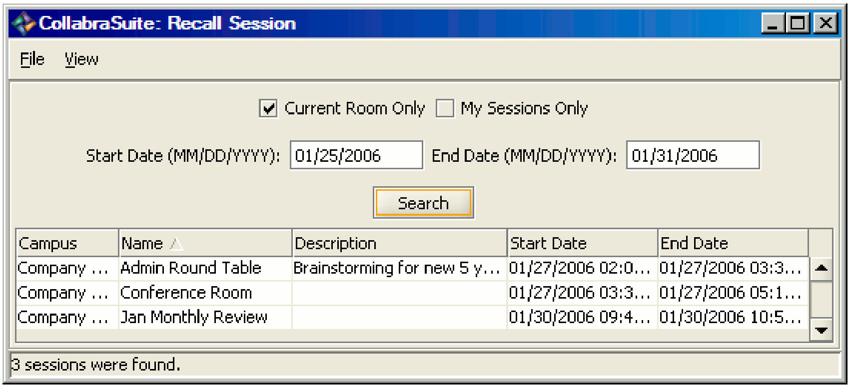
1. Select the **Whiteboard icon**  from the toolbar.
2. Right-click in the canvas and select **Recall Whiteboard Session.** The Recall Session window will appear.



3. Select your search criteria from the following options: **Current Room Only, My Sessions Only, Start Date,** and **End Date**.

   Note: You can use as many or as few search criteria as desired.

4. Click **Search.** A list of sessions based on your criteria will display.



5. Double-click to open a specific session in a new Whiteboard window.

   Note: Recalled sessions are read-only. Users can not draw new annotations in these sessions.

Media

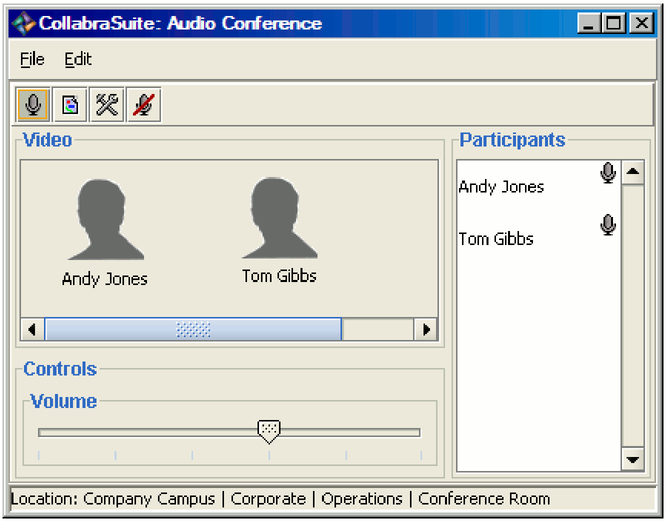
CollabraSuite BEA Edition provides a rich media communication capability that supports both multicast and point-to-point audio and video conferencing, as well as desktop sharing. Conference participants are identified via presence awareness mechanisms and visual displays that indicate their level of participation. Multicast audio and video conferencing allows several users located in the same room to communicate using either audio alone, or a combination of audio and video. Audio and video conferencing can also be accomplished with two users present in the collaborative environment regardless of their virtual location through point-to-point conferencing, or phoning. Users also have the ability to view other user desktops through desktop sharing.

Configuring Capture Devices

CollabraSuite BEA Edition provides a rich set of media collaboration features to perform audio and video conferencing and desktop sharing. In order to use these features, the software must be configured properly to detect your microphone and camera. In the Media Device Configuration window, users may configure audio capture, video capture, and desktop sharing.

To access the Media Device Configuration window:

1. Select the **Audio Conference icon** or the **Audio/Video Conference icon** from the toolbar. The Audio Video Conference window will display.



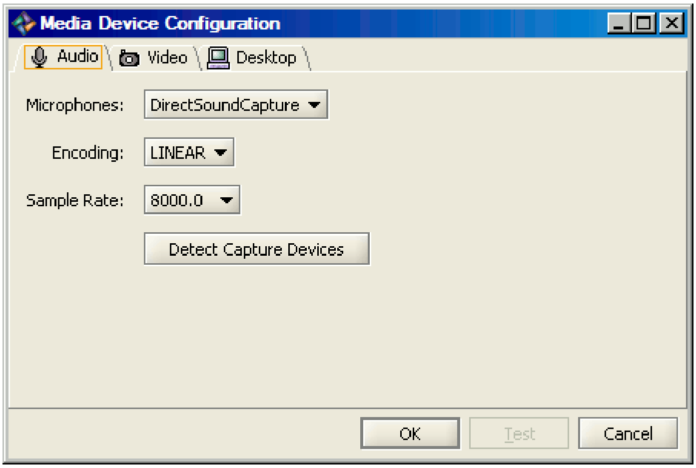
2. Select the **Media Device Configuration icon** located on the toolbar of the Audio Video Conference window. The Media Device Configuration window will display.

Audio Capture Configuration

In the Media Device Configuration window, users may configure audio capture devices. See Configuring Capture Devices to access the Media Device Configuration window.

To configure audio capture devices:

1. Select the **Audio tab** on the Media Device Configuration window.
2. Click **Detect Capture Devices.** The Microphones, Encoding, and Sample Rate pull down menus will auto populate with the appropriate values for the detected microphone.
3. Click **OK** on the Media Device Configuration window to complete the configuration process.



Video Capture Configuration

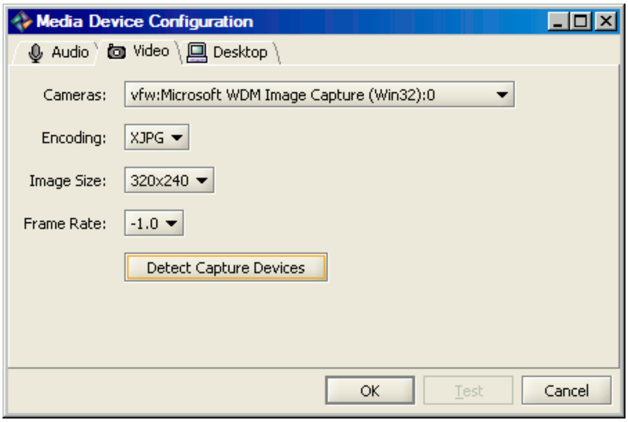
In the Media Device Configuration window, users may configure video capture devices. See Configuring Capture Devices to access the Media Device Configuration window.

To configure video capture devices:

1. Select the **Video tab** on the Media Device Configuration window.
2. Click **Detect Capture Devices.** The Cameras, Encoding Image Size, and Frame Rate pull down menus will auto populate with the appropriate values for the detected cameras.

   Note: Depending on the speed of your computer this may take several minutes to complete.
3. Select the camera currently connected to the computer from the **Cameras** pull down menu.
4. Select the appropriate image size from the Image Size pull down menu.

   Note: To minimize the resources used by the computer and network bandwidth, select the smallest image size that provides enough detail for the recipients. It is best to choose the smallest image and then increase the value if necessary.
5. Click **OK** on the Media Device Configuration window to complete the configuration process.

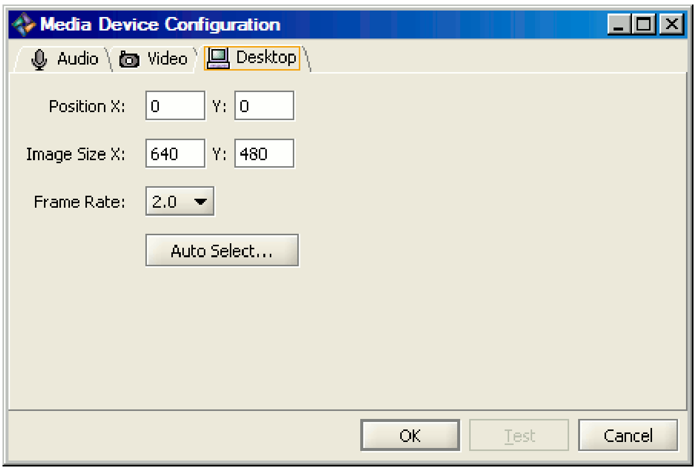


Desktop Sharing Configuration

In the Media Device Configuration window, users may configure desktop sharing. See Configuring Capture Devices to access the Media Device Configuration window.

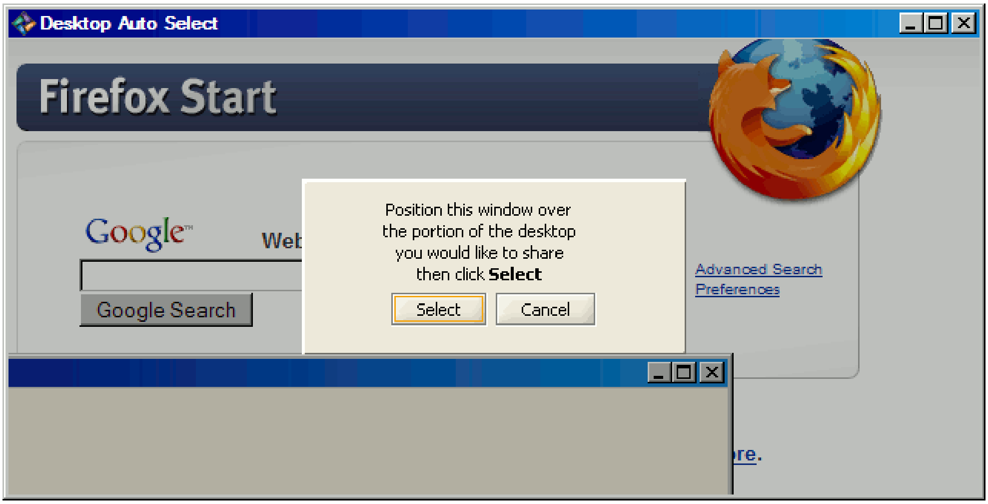
To configure desktop sharing:

1. Click **Auto Select** on the Media Device Configuration window. The Desktop Auto Select window will appear.



2. Move the window over the section of screen that you would like to share.

Note: The inside of the Desktop Auto Select window will be transparent and will display the contents of the under line region of the screen. Use this as a guide to determine the portion of the screen to display.



3. Resize the Desktop Auto Select window to the size of the section of screen to display.

4. Click **Select** to use the defined region. The Position X & Y and Image Size X & Y values will be updated according to the region selected in steps three and four.

5. Adjust the frame rate by selecting values in the Frame Rate pull down menu.

   Note: The smaller the number for the frame rate the greater the increased delay as to when recipients receive the changes made in the area specified on your screen. The smaller value also minimizes network bandwidth thus reducing both computer and network resources. It is best to start small and then increase the frame rate as necessary to accommodate the desired results.

6. Click **OK** on the Media Device Configuration window to complete the configuration process.

Audio Conferencing

Users can transmit and receive live audio during audio conference sessions. Entering a conference session will allow users to listen to the session without transmitting audio themselves. Users may also transmit their own audio during the conference and may mute transition with the click of a button. Presence awareness capabilities allow users to see who is participating in the conference and who is transmitting.

To enter an audio conference session:

- Select the **Audio Conference icon** from the toolbar.

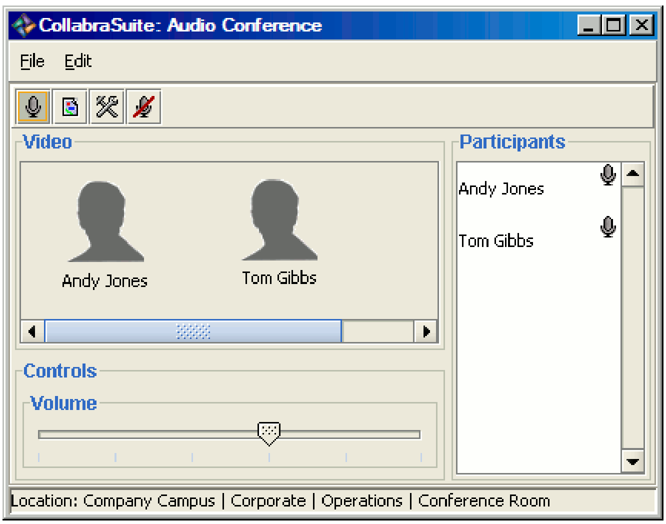
The Audio Video Conference window will display entering the audio conference session.

Note: If your microphone has not been configured for use with the CollabraSuite BEA Edition application, follow the instructions for configuring the microphone in the Audio Capture Configuration section of this manual.

To transmit audio to other participants:

- Select the **Audio Conference icon** located on the toolbar of the Audio Video Conference window.

The microphone will be activated displaying a microphone for the user in the Users panel.



Note: To stop transmitting the audio from your microphone, deselect the icon. The for your user name will disappear from the Users panel on your window as well as the other participants.

To adjust the volume:

- Slide the **Volume slider** to the right to increase the volume.
- Slide the **Volume slider** to the left to decrease the volume.

To mute the transmitted audio:

Note: Muting transmission will allow you to listen to the audio broadcast without background noise from your microphone.

- Press the **mute button** once to stop your audio broadcast.
- Press the **mute button** again to resume audio broadcasting.

Audio/Video Conferencing

Users can transmit and receive live audio and video during audio/video conference sessions. Entering a conference session will allow users to view and listen to the session without transmitting themselves. Users may also transmit their own audio and video during the conference and may stop transmission at any time. Presence awareness capabilities allow users to see who is participating in the conference and who is transmitting.

To enter a room audio/video conference session:

- Select the **Audio/Video Conference icon** from the toolbar.

The Audio/Video Conference window will display.

Note: If your microphone and/or camera has not been configured for use with the CollabraSuite BEA Edition application, follow the instructions for configuring the microphone and camera in the Video Capture Configuration section of this manual.

Note: If a user does not have a camera or their camera is disabled, the user's icon will display in the video pane and the user will only participate in the multi-point audio portion of the conference.

To transmit a video image to participants:

- Select the **Audio/Video Conference icon** located on the toolbar of the Audio Video Conference window

The captured image from the camera will be displayed in the Video panel on your window as well as the other participants. In addition, the camera image for your user will be displayed on the User panel on your window and the other participants windows.

Note: To stop transmitting the camera image, deselect the Audio/Video Conference icon .

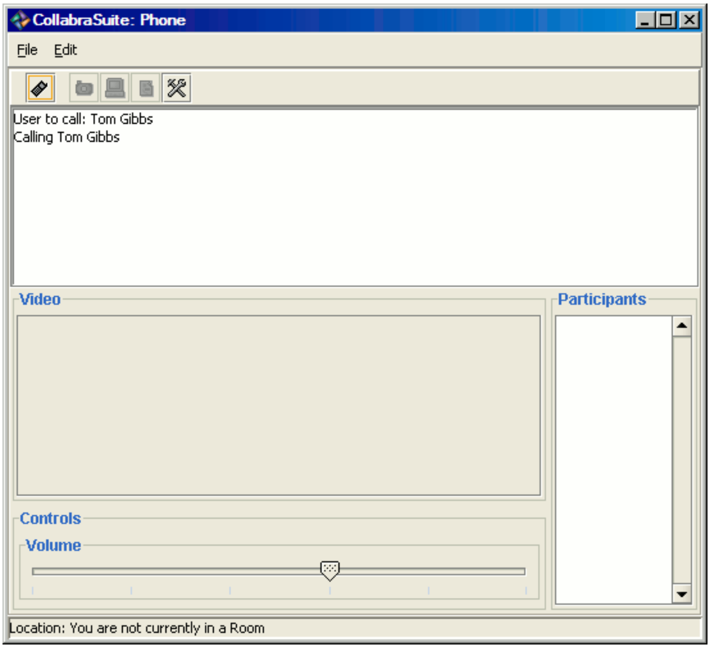
Phone

As part of the CollabraSuite BEA Edition multimedia suite, CollabraSpace offers audio and video point-to-point phoning capability. This feature provides audio/video conferencing as well as desktop sharing between two online users. Users can either be in the same room or two different rooms.

To initiate an audio phone session:

1. Select one user from either the Online Users, Room Occupants, Associates or Skill Search components.
2. Right-click to display the context menu and select **Phone** or click the **Phone icon** on the toolbar.

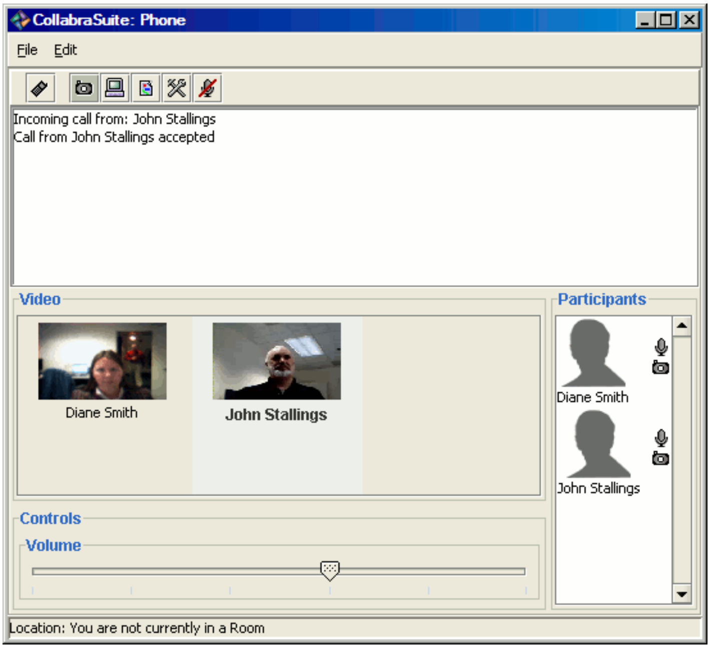
The Phone Media component will display on your screen and on the selected users screen awaiting their response to join in the phone session.



To accept a phone session:

- Select the **Phone icon**  from the toolbar of the Phone Media component.

  Note: When the recipient accepts the call both users will be placed in the point-to-point audio session and can collaborate privately. The Video pane will remain empty unless the users have configured their profiles with a user icon. If so, the user's icon will display during the point-to-point audio session.



To end a phone session:

- Select the **Phone icon** on the toolbar of the Phone Media component.

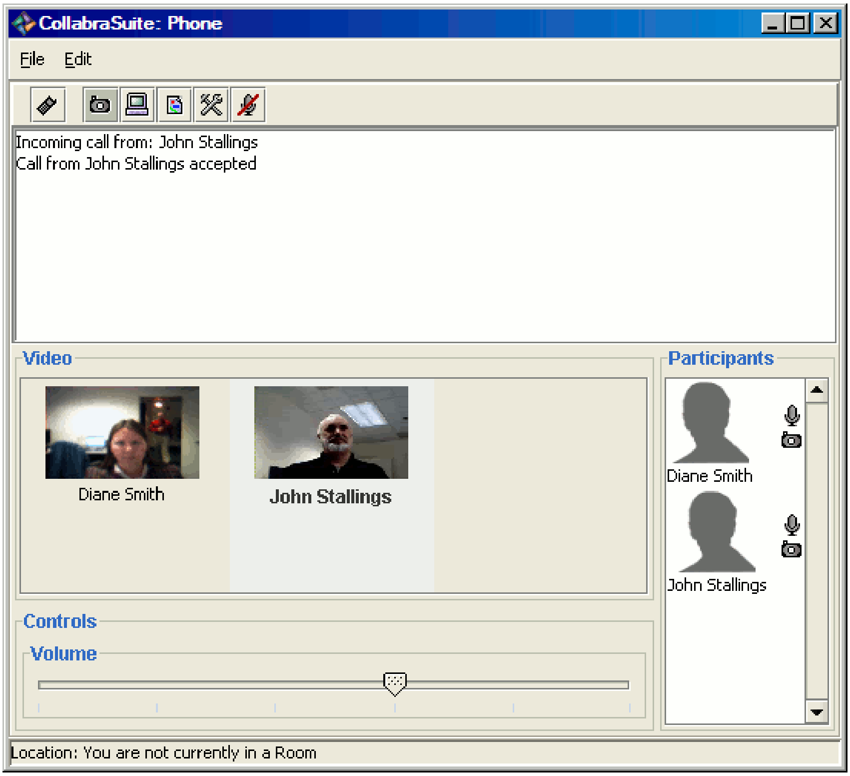
Adding Media to a Phone Session

Point-to-Point audio/video conferencing capabilities allow users to add video or desktop sharing to an audio phone session allowing for a more personal collaboration between two users. Users can either be in the same room or two different rooms.

To add video to a phone session:

- Select the **Video icon** on the toolbar of the Phone Media component.

Note: If a user does not have a camera or their camera is disabled, the user's icon will display in the video pane and the user will only participate in the multi-point audio portion of the conference.



To add desktop sharing to a phone session:

- Select the **Desktop Sharing icon** on the toolbar of the Phone Media component.

  Note: See the Desktop Sharing section of the manual to learn how to share a region of your desktop.

Desktop Sharing

Users can display their desktop or a selected area of their desktop to one or more participating users using the Desktop Sharing feature. This feature is accessed from the Audio and Video conferencing tool using the **Audio/Video button** .

To initiate a Desktop Sharing session:

1. Select the **Configure Capture Device icon** or select **Edit > Configure Capture Devices** from the menu bar in the Audio and Video conferencing window.
2. Select the Screen tab and use the Auto Select feature to select the portion of the screen to share.

   Note: Detailed instructions on sharing a portion of the screen are described in detailed in the Desktop Sharing Configuration section of this manual.

3. Click **OK** to save the configured settings.
4. Select the **Desktop Sharing icon** .
5. The screen image will be displayed in the Video panel on your window as well as other participants' windows. In addition, the Video image will be displayed on the User panel on your window and on other participants' windows.

Note: To stop transmitting the camera image, deselect the **Desktop Sharing icon** .

Document Management

CollabraSuite BEA Edition provides a means to collaborate on critical business data via the room file cabinet and the private briefcase data storage. Users may import documents into the collaborative environment, or export documents onto their local systems. Contents can be assigned privileges for groups or individuals, checked in/out and tracked for change history. Subscription services are also available for all content and data stored in the environment. Groups or individuals can receive a page notification when content subscriptions are activated and content status changes.

The the file cabinet and briefcase allows you to manage your documents by:

- Importing, bulk importing, and exporting documents.
- Viewing and editing the contents of a document.
- Creating other document types.
- Retrieving document history.
- Moving and copying folders and documents.
- Creating folders and sub-folders to hold documents.
- Assigning document permissions and document subscribers.

Document Storage

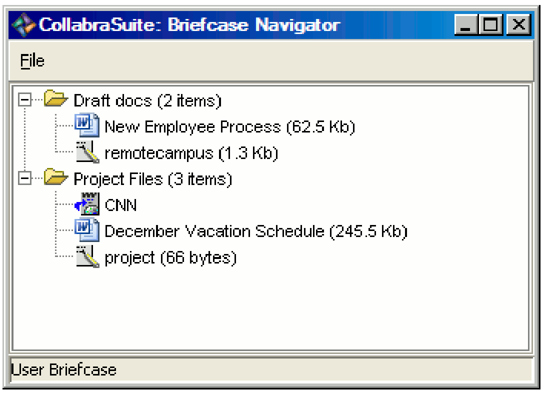
Briefcase Documents

CollabraSuite BEA Edition provides a means to transport and collaborate on critical business data through the use of a private data storage briefcase. The briefcase moves with the user as they traverse the virtual environment, and the contents can only be viewed by the briefcase owner. Briefcase contents can easily be copied or moved to a room file cabinet to be shared with other users when needed.

To launch the Briefcase Navigator:

- Click the **Briefcase icon**  from the toolbar.

The Document Navigator will appear displaying the contents of the user briefcase.



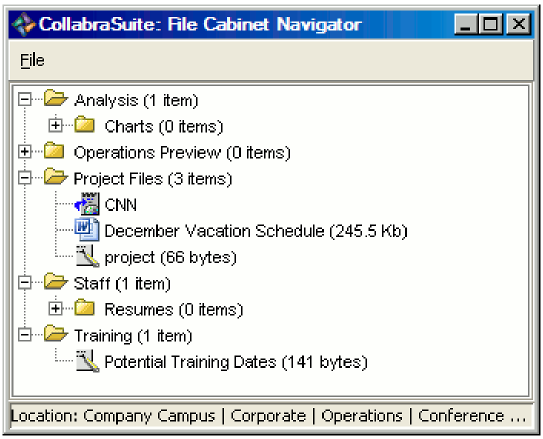
File Cabinet

CollabraSuite BEA Edition provides a means to collaborate on critical business data via the room file cabinet. Contents can be imported from a user’s desktop to a room file cabinet to facilitate knowledge sharing. CollabraSuite BEA Edition provides fine grained access control by assigning read and write privileges for both groups and individuals. Documents can be checked out for editing to prevent users from making conflicting changes. An audit trail provides a detailed history of the evolution of every document. Subscription services are also available for all content stored in the environment. Through subscriptions, groups or individuals can receive a page notification when content is changed that may require their attention.

To launch the File Cabinet Navigator:

- Click the **File Cabinet icon** from the toolbar.

The Document Navigator will appear displaying the contents of the file cabinet. Edited documents are indicated in italics and descriptive tooltips.



Folders and Subfolders

Users can create folders and subfolders in the file cabinet and briefcase to assist in the organization of documents.

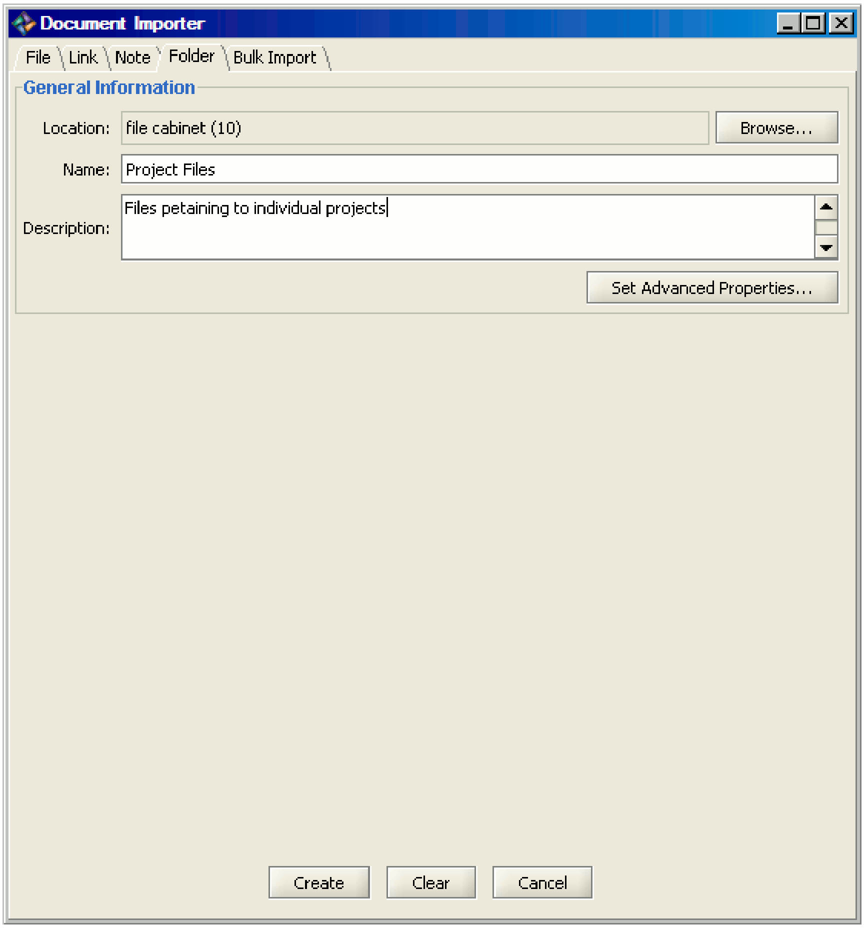
To create a new folder or subfolder:

1. Select a target folder within the file cabinet or briefcase or select an open area within the file cabinet or briefcase to insert the new folder.

2. Right-click to view the context menu.
3. Select **New** > **Folder.** The Document Importer window will appear with the Folder tab displayed.
4. Type the name and description of the folder in the **General Information** section of the window.

   Note: Select the **Set Advanced Properties** button to adjust the Document Permissions and Document Subscribers for the new folder.

5. Click **Create** to create the folder in the collaborative environment.



Import Documents

Users can place documents in the collaborative environment by importing into a briefcase or file cabinet. To import a document to the file cabinet, the user must have write permissions to the target folder. To export the document from the file cabinet, the user must have read permissions.

To import a document into a file cabinet or briefcase:

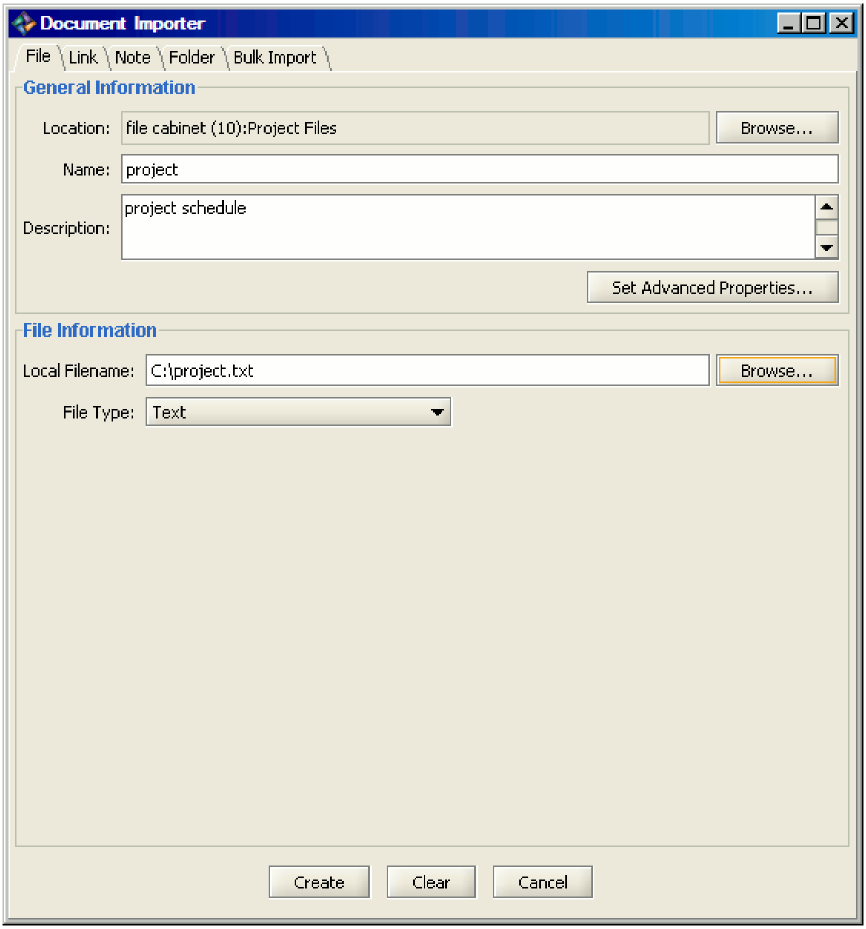
1. Select a target folder within the file cabinet or briefcase, or select an area within the file cabinet or briefcase to insert the document at the top level.
2. Right-click to view the context menu.
3. Select **New > File.** The Document Importer window will appear with the File tab displayed.
4. Type the name and description of the file in the **General Information** section of the window.

   Note: Select the **Set Advanced Properties** button to adjust the **Document Permissions** and **Document Subscribers** for the imported file. Remote users do not have the ability to update document permissions or subscribers for documents on a remote campus.

5. Select the **Browse button** in the **File Information** section of the window. The Choose Local File window will display.
6. Locate the file to import and click **Select.**

   Note: Use the Files of type filter to assist in locating files of a specific type.

7. Click **Create** to import the document into the collaborative environment. A progress bar will appear for longer transfers.



Bulk Import Documents

Bulk importing allows users to import several documents into a file cabinet or briefcase at once, rather than one at a time using the regular import methods.

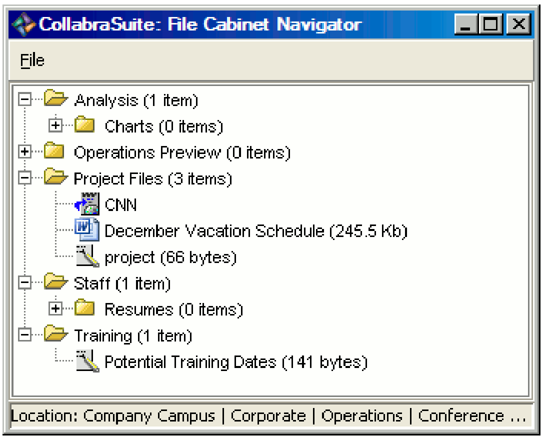
To bulk import documents and folders into a file cabinet or briefcase:

1. Select a target folder in the file cabinet or briefcase or select an area within the file cabinet or briefcase to insert the document at the top level.
2. Right-click to view the context menu.
3. Select **New** > **Bulk Import.** The Document Importer window will appear (Go to step 4 to continue.)

Or

1. Open the file explorer application for your system.
2. Select a folder, file, or a group of files and/or folders to import.
3. Drag and drop the document(s) or folder(s) to the desired new location in the file cabinet or briefcase. The Document Importer window will appear with the Bulk Import tab displayed.

   Note: Select the **Set Advanced Properties** in the General Information to adjust the Document Permissions and Document Subscribers for the imported files.

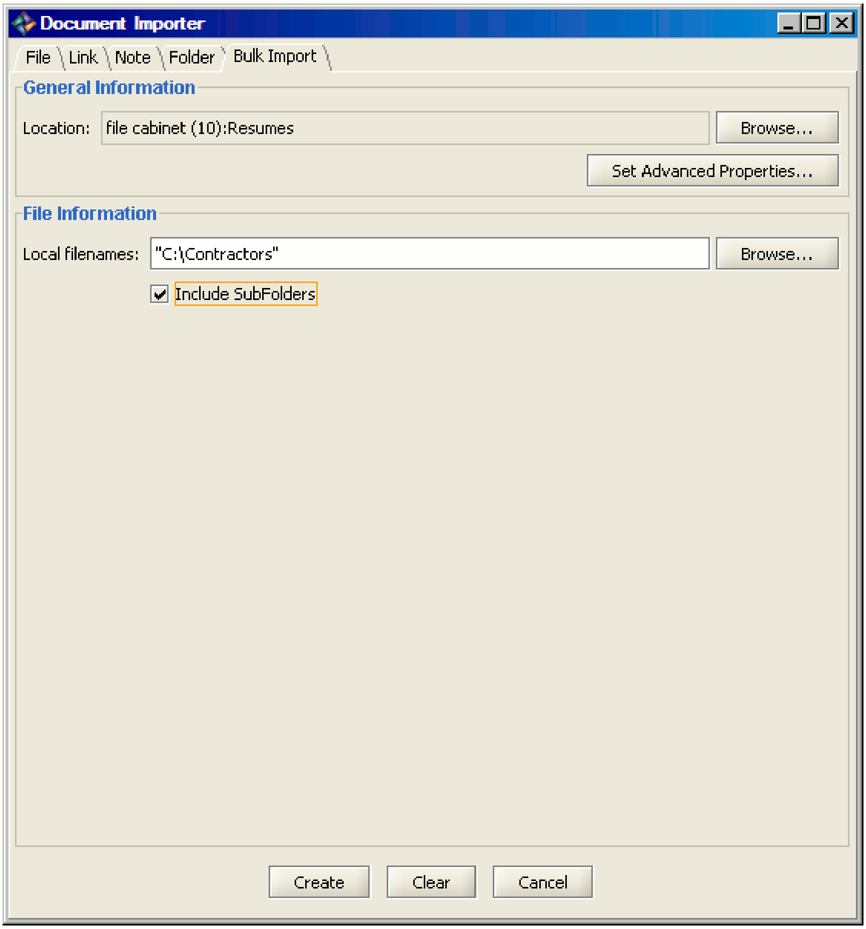


4. Select the **Browse button** in the File Information section of the window to set the Local filenames to be imported. The Choose Local Files or Directories window will display.
5. Locate the files and/or directories to be imported and click the Select button.

   Note: Use the Files of type filter to assist in locating files of a specific type.

6. Select the **Include Sub Folders option** to include sub folders of any selected folders.

7. Select the **Create button** to create the document in the collaborative environment. A progress bar will appear during longer transfers.



Export Documents

Users may retrieve documents from the collaborative environment and save them on their local systems by exporting documents. This will allow users to edit documents without having to check them out, or access documents from other locations. If a document is edited after being exported and a user would like to return it to the collaborative environment, they must import the document again.

To export documents from a file cabinet or briefcase:

1. Select a document in the file cabinet or briefcase.
2. Right-click to view the context menu.
3. Select **Document > Export.** The Export file window will appear.
4. Select the target file for the document to be exported.
5. Click **Save** to save the contents of the document to the named file. A progress bar will appear for longer transfers.

Viewing Documents

Users can view documents in their briefcase or in any file cabinet for which they have read privileges. Users may also select a custom application in which to view the document. Viewing documents opens a read-only version of the document that cannot be edited. To edit a document, it must be checked out. Users may also view the document history to see the changes that have been made.

To view the current version of a file cabinet or briefcase document:

1. Select the document from the file cabinet or briefcase.
2. Right-click to view the context menu.
3. Select **Document > View** to use the default application for your system or select **Document > View With** to select an application for viewing the document.

The document will display using the appropriate application for the document type or the selected application.

To view a previous version of a file cabinet or briefcase document:

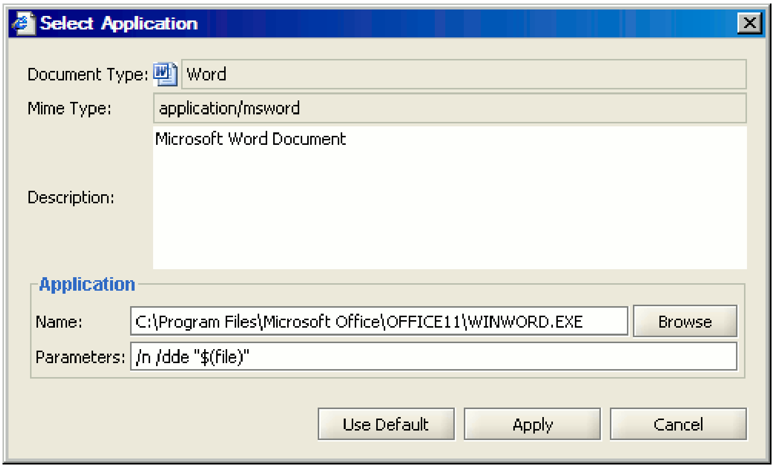
1. Select the document from the file cabinet or briefcase.
2. Right-click to view the context menu.
3. Select **Properties > View** to open the document information.
4. Right-click on a row in the "Change History" and select View. The document will display using the appropriate application for the document type or the selected application.

To select a custom application to view a document:

1. Select a document from the file cabinet or briefcase.
2. Right-click to view the context menu.
3. Select **Document > View With.** The Select an Application dialog window will appear displaying the current information about the document type and the current application used to view the document. This applies to all documents of the given type.
4. Select the **Browse button.** A file selection dialog window will appear.
5. Select an application to view the document and select the **Open button.**
6. Select **Apply** in the Select Application window. The selected application will launch with the document chosen from the file cabinet or briefcase.

   Note: This procedure can also be used for selecting a custom application for editing a document by selecting the **Document > Edit With** option from the context menu.

   Note: The **Use Default** button can be used to revert back to the system default viewer/editor for the given docuemnts type.



Editing Documents

Users can check out and edit documents directly from their briefcase or any file cabinet to which they have write privileges. When a user checks out a document, it is opened in an external application and the filename will be italicized in the file cabinet or briefcase to indicate that the document is being edited. Mousing over the document will create a tooltip which displays who is currently editing the document, or the date and time the document was last modified.

Only one user may edit a document at a time. If no changes were made, or a user wishes to discard any changes, the editing session may be canceled. Administrators also have the ability to cancel editing sessions in progress regardless of the user. Otherwise, after changes are made, the user must save the document in the external application before checking it back in to the collaborative environment. When a document is checked in the filename will become plain text again. Users may also page the current editor of a document directly from the document location.

Note: Users may not use the Save-As feature of the external application or the changes will not be saved in the collaborative environment. Document changes are saved and tracked so that other users may see the most recent version of the document as well as the document history for the document.

To edit a file cabinet or briefcase document:

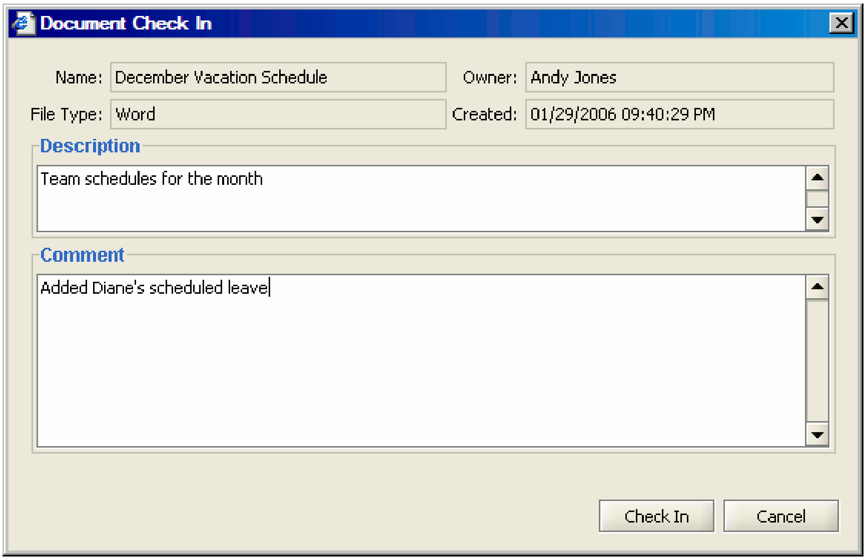
1. Select the document from the file cabinet or briefcase.
2. Right-click to view the context menu.
3. Select **Document > Edit** to use the default application for your system or select **Document > Edit With** to select an application for editing the document.
4. The document will display using the appropriate application for the document type or the selected application. An Informational Dialog window will display to notify you that an external application is being used to edit this document.

To save an edited document to the file cabinet or briefcase:

1. Save the document in the external application that was being used to edit the document.
2. Select the italicized document from the file cabinet or briefcase where it was checked out for editing.
3. Right-click to view the context menu.
4. Select **Document > Save.** The Document Check In window will appear.

   Note: An information dialog window will display if the contents of the document have not been saved in the external application. If this dialog appears, answer No, save the document in the external application and return to step 1.

5. Enter a comment describing the changes that you made to the document in the Comment section of the dialog.
6. Click **Check In** to save the document into the collaborative environment.



To cancel an edit session for a document:

Note: This process is useful whenever the document was placed in edit mode but no further changes to the document are necessary at the current time.

1. Select the italicized document from the file cabinet or briefcase where it was checked out for editing.
2. Right-click to view the context menu.
3. Select **Document** > **Cancel Edit.**

To page the current editor of a document:

1. Select the italicized document from the file cabinet or briefcase where it was checked out for editing.
2. Right-click to view the context menu.
3. Select **Page** > **Editor.**

The compose page window will appear with the current editor displayed in the Users field.

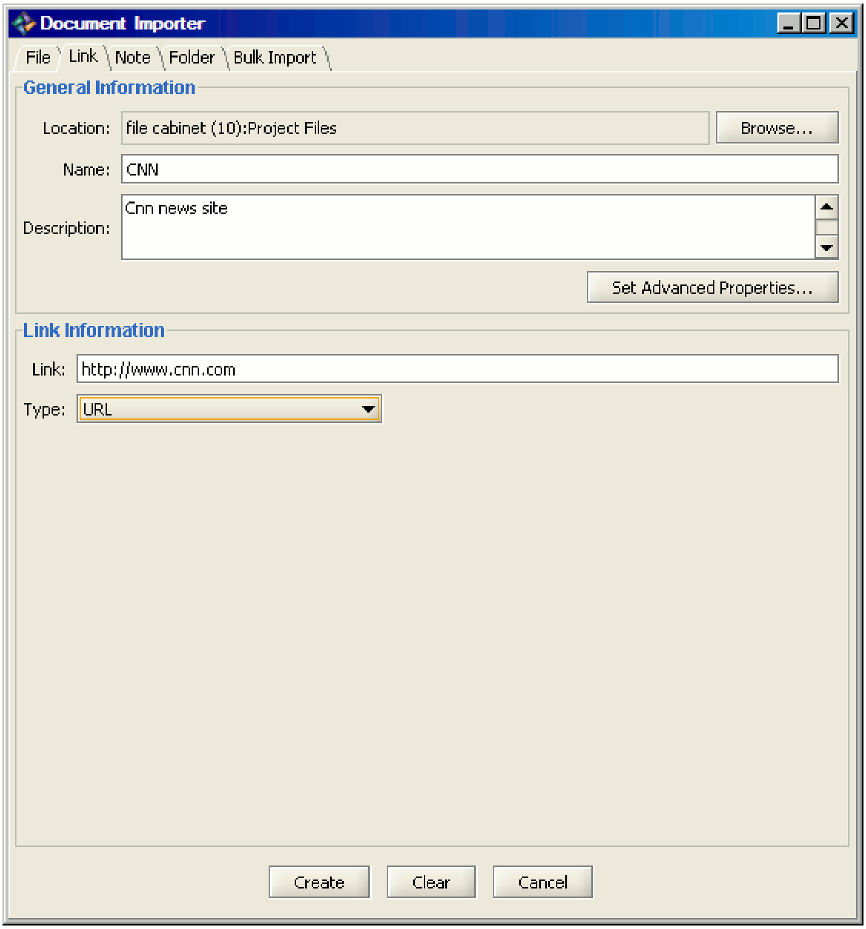
Creating Other Document Types

In addition to documents that might be imported, file cabinets and briefcases have the ability to hold other types of documents, such as links to websites or user notes that may be created in the collaborative environment.

To create a link in a file cabinet or briefcase:

1. Select a target folder in the file cabinet or briefcase or select an open area within the file cabinet or briefcase to insert the document at the top level.
2. Right-click to view the context menu.
3. Select **New > Link.** The Document Importer window will appear with the Link tab displayed.
4. Type the name and description of the file in the **General Information section** of the window.

   Note: Select the **Set Advanced Properties** button to adjust the Document Permissions and Document Subscribers for the imported file.
5. Type in the URL or link information in the **Link field.**
6. Select the appropriate type of link in the **Type pull down menu.**
7. Click **Create** to create the link in the collaborative environment.



To create a note in a file cabinet or briefcase:

1. Select a target folder in the file cabinet or briefcase or select an area within the file cabinet or briefcase to insert the document at the top level.

2. Right-click to view the context menu.

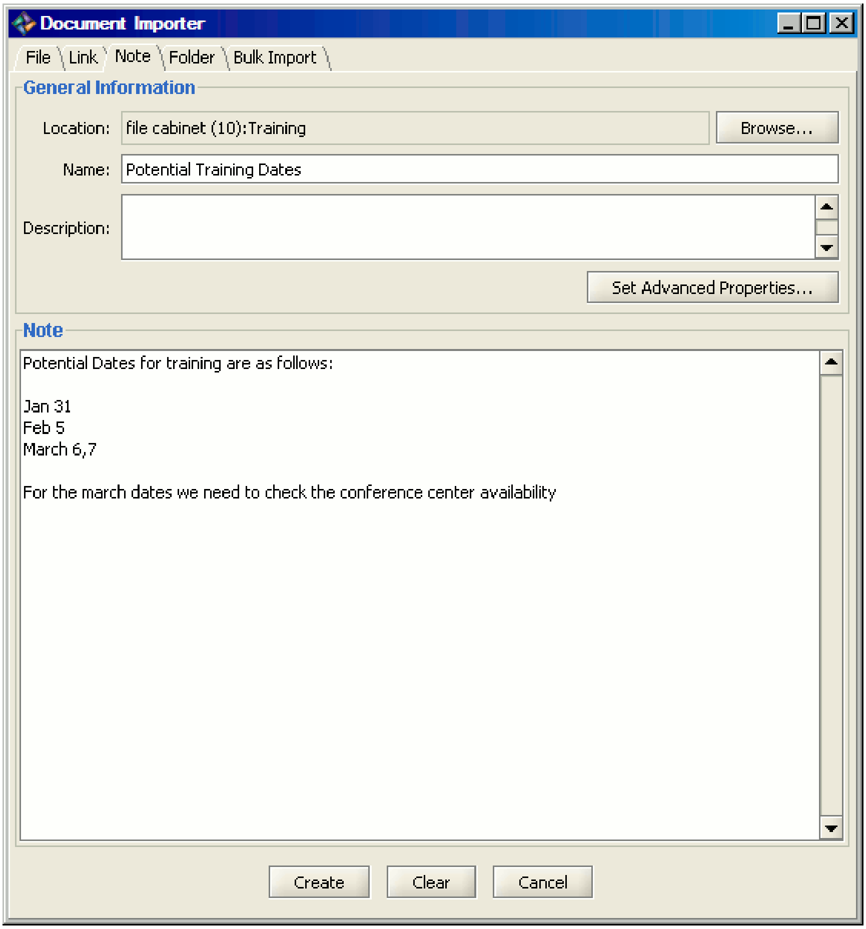
3. Select **New** > **Note.** The Document Importer window will appear with the Note tab displayed.

4. Type the name and description of the note in the **General Information section** of the window.

   Note: Select the **Set Advanced Properties** button to adjust the Document Permissions and Document Subscribers for the imported file.

5. Type in the contents of the note into the Note text area.

6. Click the **Create** button to create the note in the collaborative environment.



Moving and Copying Documents

Users can move documents and folders from the briefcase to the room file cabinet and vice versa. In addition, documents and folders within a briefcase or file cabinet can be rearranged.

To move documents and folders between a file cabinet and your briefcase:

1. Highlight the document(s) or folder(s) you wish to move.
2. Drag and drop the document(s) or folder(s) to the desired new location within the collaborative environment.

   Or

1. Highlight the document(s) or folder(s) you wish to move.
2. Right-click to display the context menu.
3. Select **Edit** > **Cut.**
4. Select the desired new location.
5. Right-click to display context menu again.
6. Select **Edit** > **Paste.**

To copy documents and folders to a file cabinet or your briefcase:

1. Highlight the document(s) or folder(s) you wish to copy.
2. Right-click to display the context menu.
3. Select **Edit** > **Copy.**
4. Select the desired new location.
5. Right-click to display context menu.
6. Select **Edit** > **Paste.**

Document Permissions

Document owners or administrators may create Access Control Lists (ACLs) for a document or folder. ACLs may be used to grant or deny users or groups read or write permissions to a document or folder. Any user or group that is granted read permission will be able to view the contents of a document or view the items contained within a folder without editing them. Any user or group that is granted write permission to a document or folder can view and edit the document or modify the contents of a folder. If a user or group is denied read or write permission to a file or folder they will be unable to view or edit a file or folder contents. Remote users do not have the ability to update document permissions for documents on a remote campus.

To modify the read permissions for a file or document:

1. Select the document or folder in the file cabinet.
2. Right-click to view the context menu.
3. Select **Properties > Edit.** The Edit Document/Folder Information window will appear.
4. Select the **Permissions tab.** The Read Permissions section will be located in the top half of the window.
5. In the Selected Users/Groups section you may indicate wether selected users will be granted or denied read permissions by selecting either the **Grant** or the **Deny radio button.** Granting users gives read permissions to those users while preventing all others from accessing the document. Denying users prevents those users from accessing the document while allowing all others access.
6. In the Available Users/Groups section, select the **Users radio button** if selecting by user, or the **Groups radio button** if selecting by group.
7. Highlight each group or user in the **Available User/Groups** list to be included in the Selected Users/Groups list.

   Note: To search for a specific user or group enter the first few letters of the person or group name in the Contains field.

8. Click the **right arrow** button to move the highlighted groups or users to the Selected Users/Groups list.

Note: Accessible remote campuses will be displayed as tabs in the Available Users/Groups section. Click on the tabs to select users or groups from each campus and continue until all desired users or groups are displayed in the Selected Users/Groups list.

9. Click **Apply** to grant or deny the selected users and groups read permissions to the document or folder.

   Note: To remove read permissions from a document or folder highlight the user or group in the Selected Users/Groups list and select the left arrow button. Click Apply to save your changes.

To modify the write permissions for a file or document:

1. Select the document or folder in the file cabinet.
2. Right-click to view the context menu.
3. Select **Properties > Edit.** The Edit Document/Folder Information window will appear.
4. Select the **Permissions tab.** The Write Permissions section will be located in the bottom half of the window.
5. In the Selected Users/Groups section you may indicate wether selected users will be granted or denied read permissions by selecting either the **Grant** or the **Deny radio button.** Granting users gives write permissions to those users while preventing all others from accessing the document. Denying users prevents those users from accessing the document while allowing all others access.
6. In the Available Users/Groups section, select the **Users radio button** if selecting by user, or the **Groups radio button** if selecting by group.
7. Highlight each group or user in the **Available User/Groups list** to be included in the Selected Users/Groups list.

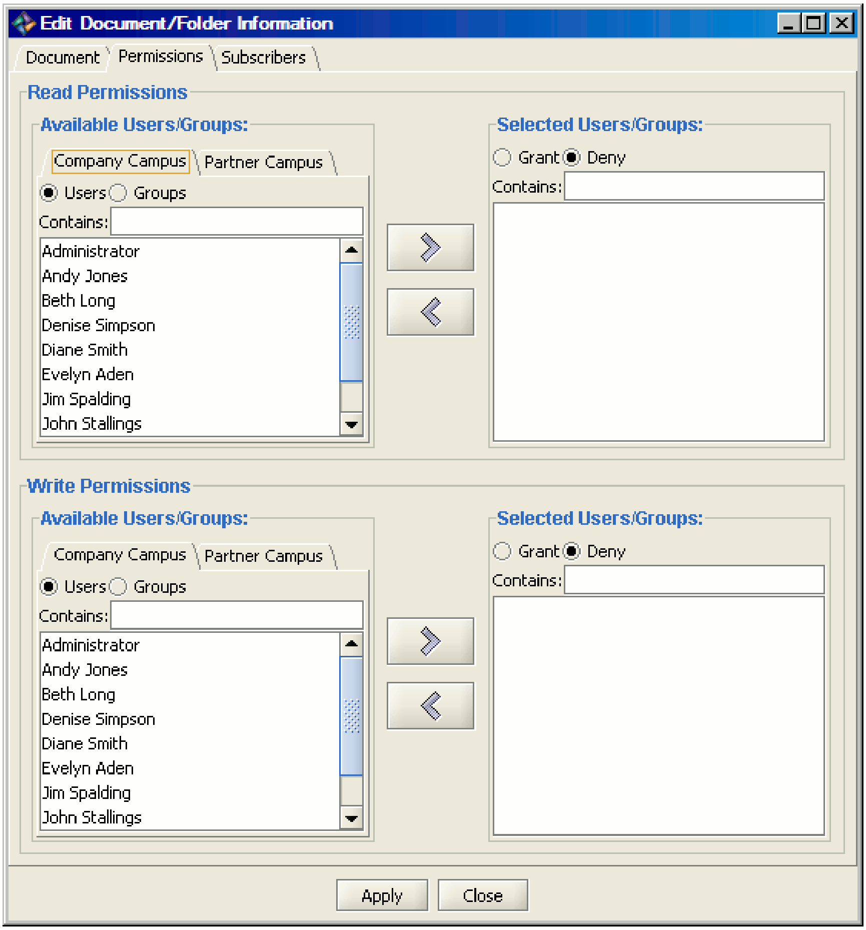
   Note: To search for a specific user or group enter the first few letters of the person or group name in the Contains field.

8. Click the **right arrow button** to move the highlighted groups or users to the Selected Users/Groups list.

   Note: Accessible remote campuses will be displayed as tabs in the Available Users/Groups section. Click on the tabs to select users or groups from each campus and continue until all desired users or groups are displayed in the Selected Users/Groups list.

9. Click **Apply** to grant or deny the selected users and groups write permissions to the document or folder.

Note: To remove write permissions from a document or folder highlight the user or group in the Selected Users/Groups list and select the left arrow button. Click Apply to save your changes.



Document Subscribers

The Document Subscribers feature is used to notify users of modifications to documents or folders. A subscriber is alerted by page when a changed document or folder is checked back into a room. Changes that cause an alert to be sent include additions or deletions to folders or edits to a file. Folder subscribers are notified when changes are made to subfolders or documents in subfolders. Users may also use the document subscriber list to page all subscribers to a document or folder without making changes to the document. Remote users do not have the ability to update document subscribers for documents on a remote campus.

To add subscribers to a document or folder:

1. Select the document or folder in the file cabinet.
2. Right-click to view the context menu.
3. Select **Properties > Edit.** The Edit Document/Folder Information window will appear.
4. Select the **Subscribers tab.**
5. Select the **Users radio button** to select by user, or the **Groups radio button** to select by group.
6. Highlight each group or user in the **Available User/Groups list** to be included in the Selected Users/Groups list.

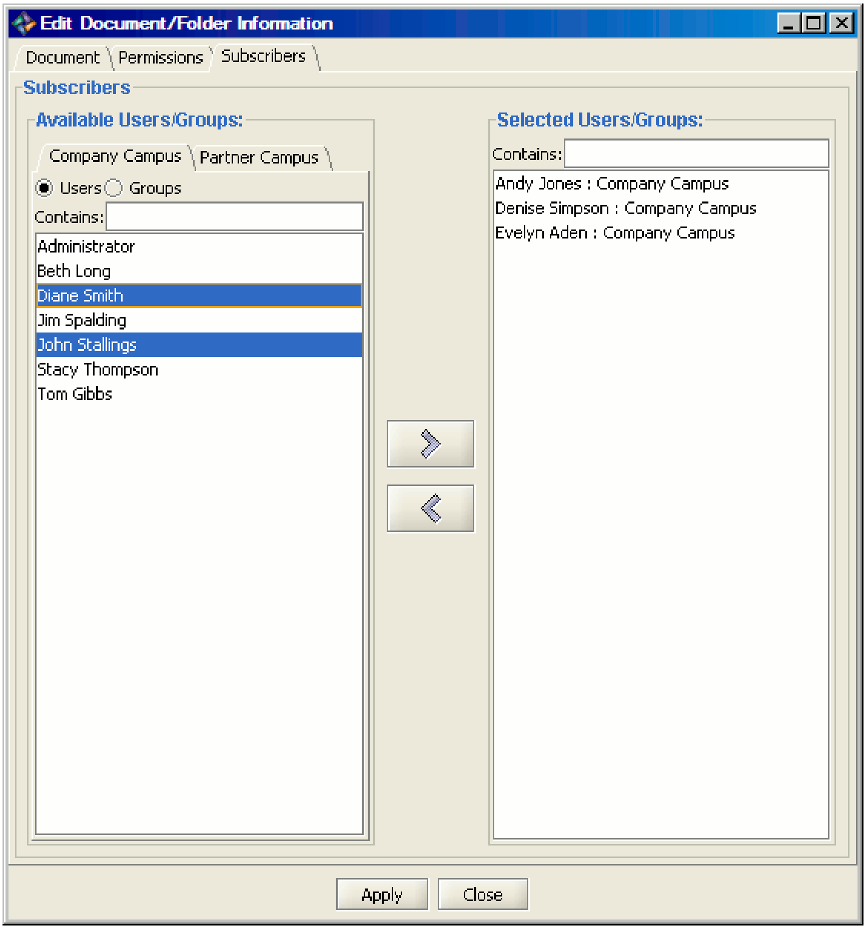
   Note: To search for a specific user or group enter the first few letters of the person or group name in the Contains field.

7. Click the **right arrow button** to move the highlighted groups or users to the Selected Users/Groups list.

   Note: Accessible remote campuses will be displayed as tabs in the Available Users/Groups section. Click on the tabs to select users or groups from each campus and continue until all desired users or groups are displayed in the Selected Users/Groups list.

8. Click **Apply** to add the selected users and groups to the document or folder subscriber list.

   Note: To remove subscribers from a document or folder highlight the user or group in the Selected Users/Groups list and select the left arrow button. Select Apply to save your changes.



To page document and folder subscribers:

1. Select a document or folder from a file cabinet.
2. Right-click to view the context menu.
3. Select the **Page Subscribers menu option.** The Page Composer window will display with the document subscribers listed as the page recipients.
4. Enter the subject and text of the message.

5. Click **Send** to send the page to the recipient.

To page the owner of a document or folder:

1. Select a document or folder from a file cabinet.
2. Right-click to view the context menu.
3. Select the **Page Owner menu option.** The Page Composer window will display with the document owner listed as the page recipient.
4. Enter the subject and text of the message.
5. Click **Send** to send the page to the recipient.

To page the user currently editing a document:

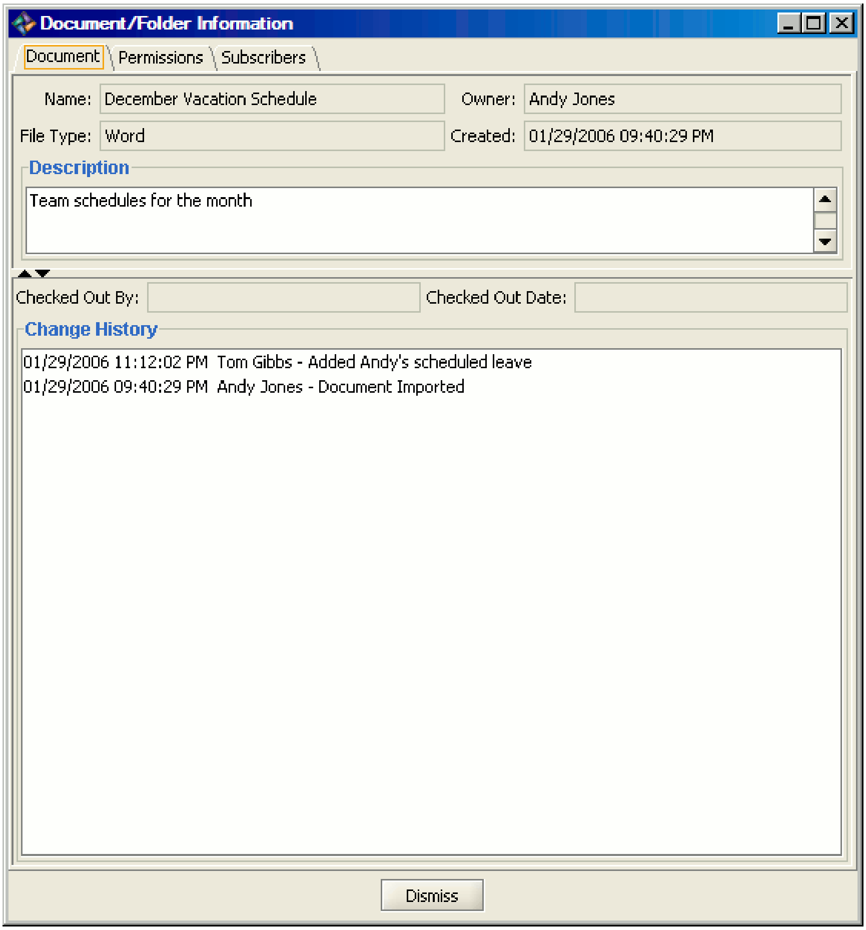
1. Select a document from the file cabinet that is currently being edited by another user.
2. Right-click to view the context menu.
3. Select the **Page Editor menu option.** The Page Composer window will display with the current document editor listed as the page recipient.
4. Enter the subject and text of the message.
5. Click **Send** to send the page to the recipient.

Document History

There are two types of document history that are recorded by the system: the change log and access history. The change log displays which users have made changes, the date of their changes, and the comments each user has added about their changes. Through the change log, users are able to access previous versions of the file in order to view changes in more detail. The access history allows users to track how often the document has been accessed and by which users, as well as their action while accessing the document, i.e., creating or reviewing.

To view the change log for a document or folder:

1. Highlight the document on which you wish to view the change history.
2. Right-click to view the context menu.
3. Select **Properties** > **View.** The Document/Folder Information window will appear with the change history displayed.



To view a previous version of a file cabinet or briefcase document:

- Right-click on a row in the Change History field and select **View.**

The document will display using the appropriate application for the document type or the selected application.

To view the access history for a document or folder:

1. Highlight the document on which you wish to view the access history.
2. Right-click to view the context menu.
3. Select **Document** > **History.** A web page displaying the access history for the document will appear.

Document History Results

Document Name	User Name	Location	Action	Action Date/Time
December Vacation Schedule	Andy Jones	Corporate\Operations\Conference Room\file cabinet (10)\Project Files	Create Doc	01/29/2006 09:40 PM
December Vacation Schedule	Andy Jones	Corporate\Operations\Conference Room\file cabinet (10)\Project Files	Create Rev	01/29/2006 09:40 PM
December Vacation Schedule	Andy Jones	Corporate\Operations\Conference Room\file cabinet (10)\Project Files	View Rev	01/29/2006 09:42 PM
December Vacation Schedule	Tom Gibbs	Corporate\Operations\Conference Room\file cabinet (10)\Project Files	Create Rev	01/29/2006 11:12 PM
December Vacation Schedule	Tom Gibbs	Corporate\Operations\Conference Room\file cabinet (10)\Project Files	View Rev	01/29/2006 11:12 PM
December Vacation Schedule	Tom Gibbs	Corporate\Operations\Conference Room\file cabinet (10)\Project Files	CheckIn Rev	01/29/2006 11:12 PM
December Vacation Schedule	Andy Jones	Corporate\Operations\Conference Room\file cabinet (10)\Project Files	View Rev	01/29/2006 11:14 PM
December Vacation Schedule	Andy Jones	Corporate\Operations\Conference Room\file cabinet (10)\Project Files	View Rev	01/29/2006 11:15 PM
December Vacation Schedule	Tom Gibbs	Corporate\Operations\Conference Room\file cabinet (10)\Project Files	Create Rev	01/30/2006 02:05 PM
December Vacation Schedule	Tom Gibbs	Corporate\Operations\Conference Room\file cabinet (10)\Project Files	View Rev	01/30/2006 02:05 PM
December Vacation Schedule	Tom Gibbs	Corporate\Operations\Conference Room\file cabinet (10)\Project Files	CheckIn Rev	01/30/2006 02:10 PM

Virtual Rooms

When users enter the virtual workspace of CollabraSuite BEA Edition, they will enter a room, which is part of a floor, building, and campus. In the rooms, users are able to communicate and collaborate with other users in the same environment through a variety of methods, such as chat sessions, document sharing, whiteboard sessions, and paging. Presence awareness capabilities enable users to see the other room occupants that are available for collaboration. Rooms allow users to customize their own workspace to be most efficient for their needs. "Home" rooms may be selected into which the users will automatically enter each time they log on. Through a room navigator, users are able to move through the floor, building, or campus to the rooms specific to their needs

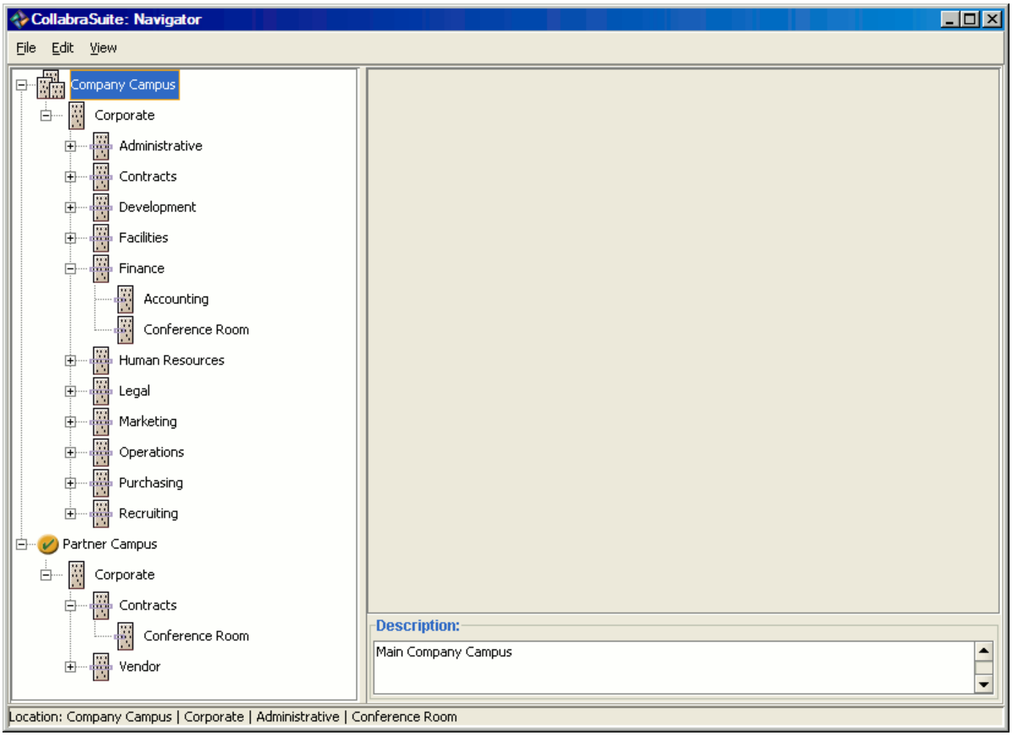
Room Navigator

The CollabraSuite BEA Edition environment is easily navigated by way of a hierarchical display of campuses, buildings, floors, and rooms. The Navigator also displays the same hierarchical display of any remote campus to which the user has been given access, allowing seamless movement between campuses. Users are automatically logged in to any remote campuses to which they have been given access once they have accessed their own home campus but they may log out of any campus at any time via the context menu. Users may also choose to disable the automatic logins to remote campuses via the Navigator Preferences. A checkmark icon next to a remote campus indicates that the user is logged in, and an X icon indicates that the user must log in before entering. The navigator provides a detailed description and image of each component within the virtual space and allows users to instantly enter a selected room. The descriptions and images can be hidden via the Navigator tab on the Preferences Editor.

To access the Navigator:

- Click the **Navigator icon** on the toolbar.

The Navigator window will appear.



To search for a building, floor, or room:

1. Select any item from the navigation tree on the left.
2. Right-click and select **Search** > **Search** from the context menu.
3. Enter a search term in the field provided and select **OK.** The first campus, building, floor, or room that matches the search term will be highlighted in the navigation tree.
4. Right-click and select **Search** > **Search Again** to find the next campus, building, floor, or room that matches the search term. Continue this process until the desired area is found.

To enter a room:

1. Select a room from the navigation tree on the left.
2. Right-click and select **Enter Room** from the context menu. You will be moved to the selected room.

Administrators

Each room, building, and campus has administrators, users who are able to create, update, and modify access to areas. You can view the administrators for each room and communicate with them easily by sending a page if you have questions or concerns about the environment.

To view administrators:

1. Select a campus, building, floor, or room from the navigation tree.
2. Right-click and select **View Administrators** from the context menu.

A web browser window will display with the administrator details for the selected campus, building, floor, or room.

To page administrators:

1. Select a campus, building, floor, or room from the navigation tree.
2. Right-click and select **Page Administrators** from the context menu.

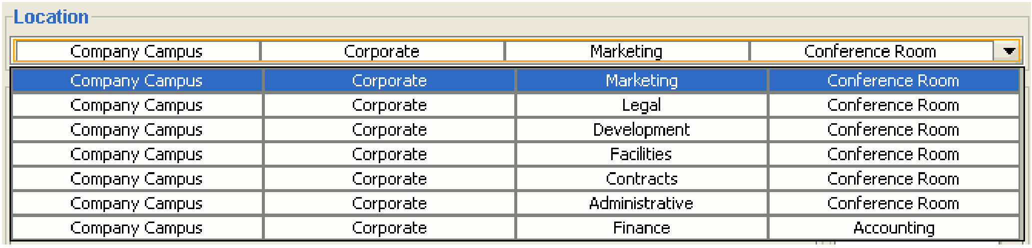
The Page Composer window will display with the administrators for the selected campus, building, floor, or room shown.

Room Location

The CollabraSuite BEA Edition Room Location component displays a history of recently visited rooms in both the home campus and any remote campuses. Remote campus rooms will be stored during the current session only, while local rooms will be stored throughout several sessions. Alternatively, the system can be configured to show all available rooms. This component can also be used as a quick navigation to a desired room in lieu of using the Navigator component.

To enter a room using the Room Location component:

1. Select the current room location or click the down arrow in the **Room Location component.** A list of previously visited rooms will be displayed.
2. Select a room from the list. The user will be moved to the selected room.

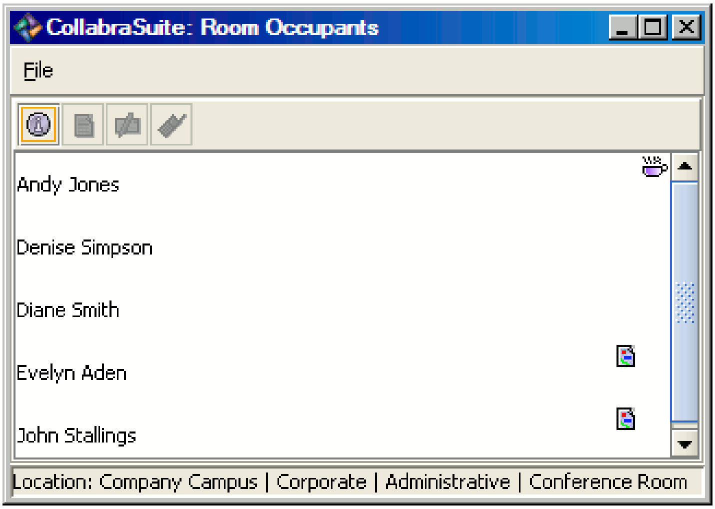


Room Occupants

The CollabraSuite BEA Edition Room Occupants component allows users within a room to visually see who else is in the room either by user name alone or with user icons. A default icon is displayed until a user selects a personalized image. When a user enters a room, their presence in the room is indicated in the Room Occupants component.

Each user has the option of displaying the user icons, or hiding the user iconsfor a more compact display. User icons can be enabled or disabled in the Room Occupants tab of the Preferences Editor. Additional icons are displayed beside each user indicating if the user is viewing the whiteboard, participating in an A/V session or is idle. Double-clicking on a user will bring up the User Information window.

Additional features of the Room Occupants component are accessing additional information about other users, initiating a sidebar conversation, sending a page, and placing point-to-point calls to other users in the room. Users may follow the directions below to access any of these additional features, or may access the User Information window by double-clicking on a user.



To access the additional features of the Room Occupants component:

1. Select one or more users within the **Room Occupants component.**
2. Right-click to display the context menu
3. Select the desired function from the context menu

The User Information, Sidebar, Page, or Phone window will appear.

User Preferences

CollabraSuite BEA Edition users can manage their own profile information via the user information management tool. Account information, including name and user icon, may be changed by the individual user. Additionally, the account owner maintains their home room, contact information, and skills. Information concerning other users can be viewed by browsing the user list in the user information management tool.

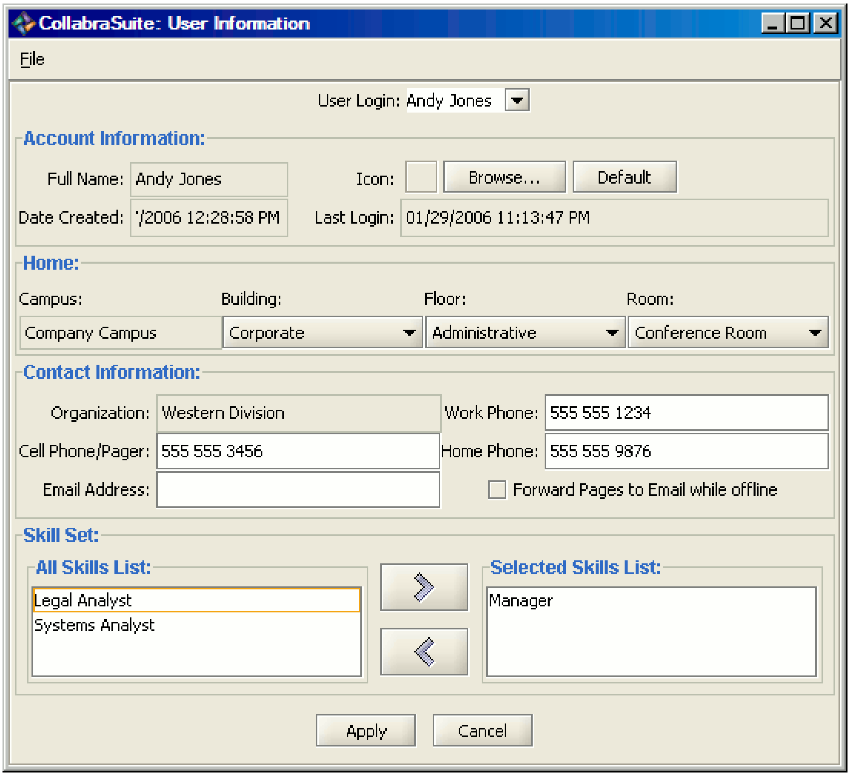
To access the User Information dialog:

- Right-click in any of the collaboration components and select the **Info menu option.**

  Or

- Where available, click the **User Information icon** in the toolbar.

The User Information dialog will appear.



The User Information dialog contains the following information:

- User Login—the selected user for displaying information in the User Information dialog.
- Account Information—full name, user icon, date the account was created, and the last login date of the user.
- Home—the room designated as the user's home room, the floor, the building, and the campus of the home room.
- Contact Information—organization, cell phone/page number, email address, work phone, home phone, and a box to check if the user would like to automatically redirect pages to the email specified.

- Skill Set—a field allowing an administrator or users themselves to apply a set of skills for user accounts.

To retrieve information on another user account:

- Select a user from the **User Login pull down menu.** The data in the window will change to reflect the user selected.

To change the Icon:

1. Select the **Browse button** just to the right of the Icon field in the User Information dialog to display the Choose Image dialog window.
2. Browse to the file that contains the new image icon (e.g. a gif or jpeg file).
3. Click **Open** to close the Choose Image dialog window.

To change home room:

- Select the building, floor, and room from the pull-down menus in the Home section.

To change contact information:

- Type the new information in the **Contact Information fields.**

To receive page notifications while off line:

- Select the checkbox area for the **Forward Pages to Email while off-line option.**

To add skills to the Skill Set:

- Select items from the **All Skills List** and click the **right arrow** to move the selected skill from the All Skills List to the Selected Skills List.

To remove skills from the Skill Set:

- Select items from the **Selected Skills List** and click the **left arrow** to move the selected skill from the Selected Skills List to the All Skills List.

Click at the bottom of the User Information dialog window to save any changes made to the fields on this dialog.

Preferences Editor

CollabraSuite BEA Edition provides a preferences editor for customizing the collaborative experience on an individual basis. Items configured using the preferences editor are saved for the user account and are reused for future login sessions.

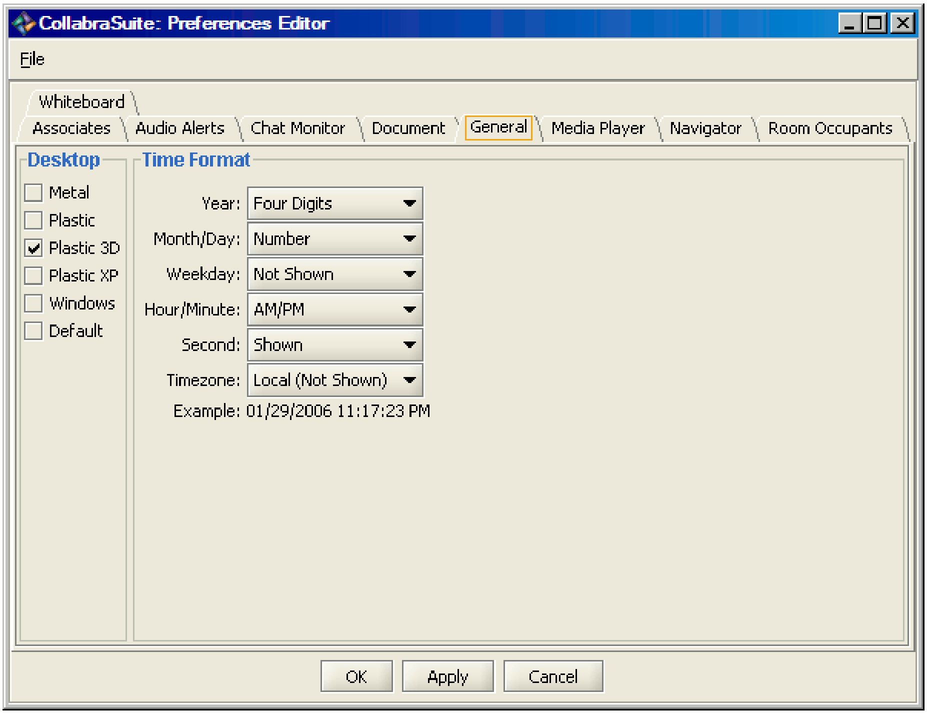
Items that may be customized using the Preferences Editor are:

- Associates Preferences
- Audio Alerts Preferences
- Chat Monitor Preferences
- Desktop Preferences
- Document Preferences
- Media Player Preferences
- Navigator Preferences
- Room Occupants Preferences
- Whiteboard Preferences

To launch the Preferences Editor:

- Select the **Preferences Editor** icon from the toolbar.

The Preferences Editor window will display.



General Preferences

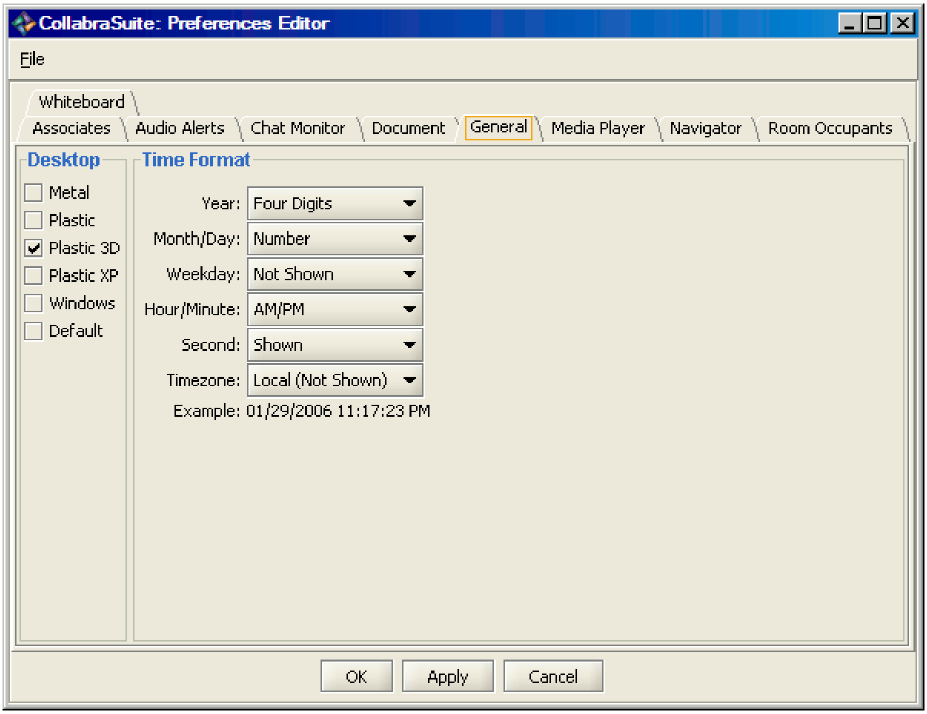
The look and feel of the desktop can be tailored to user preference by selecting the various appearance options provided by the application.

To customize the desktop:

1. Select the **General tab** in the Preferences Editor window.
2. Select one of the desktop appearance settings from the selection list.
3. Click **Apply** to view the selection.
4. Click **OK** to save the changes and exit the window, or click **Cancel** to exit the window without saving the selection.

To customize the dates and timestamps:

1. Select the **General tab** in the Preferences Editor window.
2. Select the desired date and time formats from the selection lists.
3. Click **OK** to save the changes and exit the window, or click **Cancel** to exit the window without saving the selection.

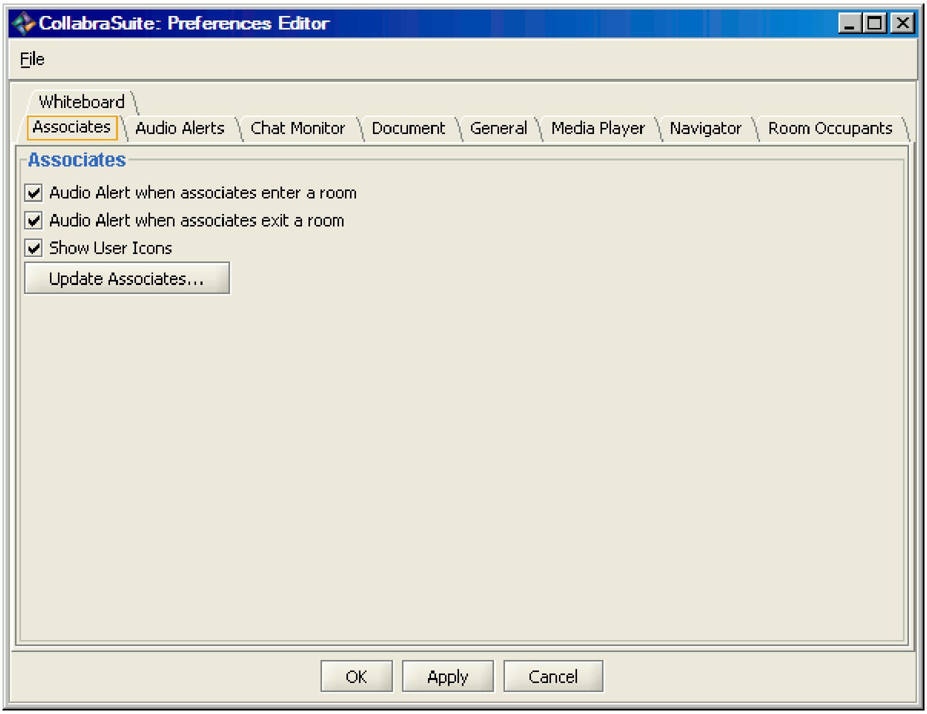


Associates Preferences

The Associates component allows users to view detailed presence awareness information about users who frequently collaborate with them. Users can add other people to their associates list, which can then be used to alert the user when associates enter the user's current room, exit the room, or display images that users have selected for themselves in their user profile.

To customize the Associates List:

1. Select the **Associates tab** in the Preferences Editor window.
2. Select the check boxes next to the desired options for associates preferences.
3. Click **Apply** to save the settings for your user account.



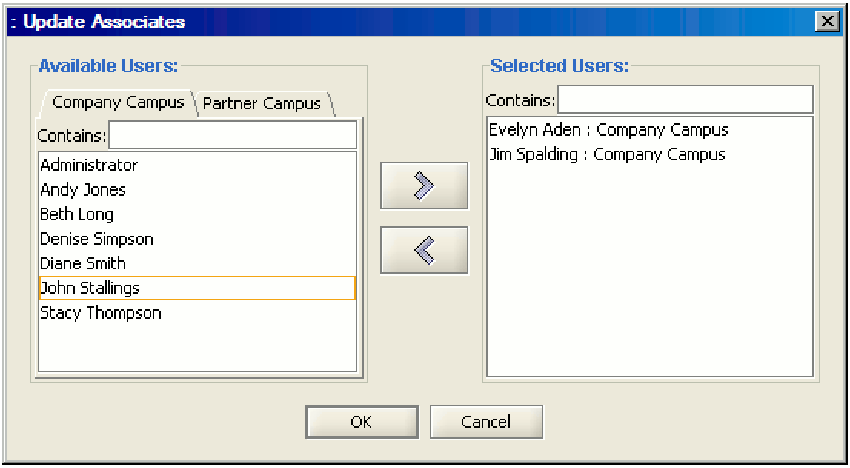
To add/remove users from the Associates List:

1. Click **Update Associates** on the Associates tab of the Preferences Editor window.
2. Highlight each user in the Available Users list to be included in the Selected Users list.

Note: To search for a specific user, enter the first few letters of the user's name in the Contains field.

3. Click the **right arrow button** to move the highlighted users to the Selected Users list.
4. Click **OK** to add the selected users to the Associates List

Note: Accessible remote campuses will be displayed as tabs in the Available Users/Groups section. Click on the tabs to select users or groups from each campus and continue until all desired users or groups are displayed in the Selected Users/Groups list.



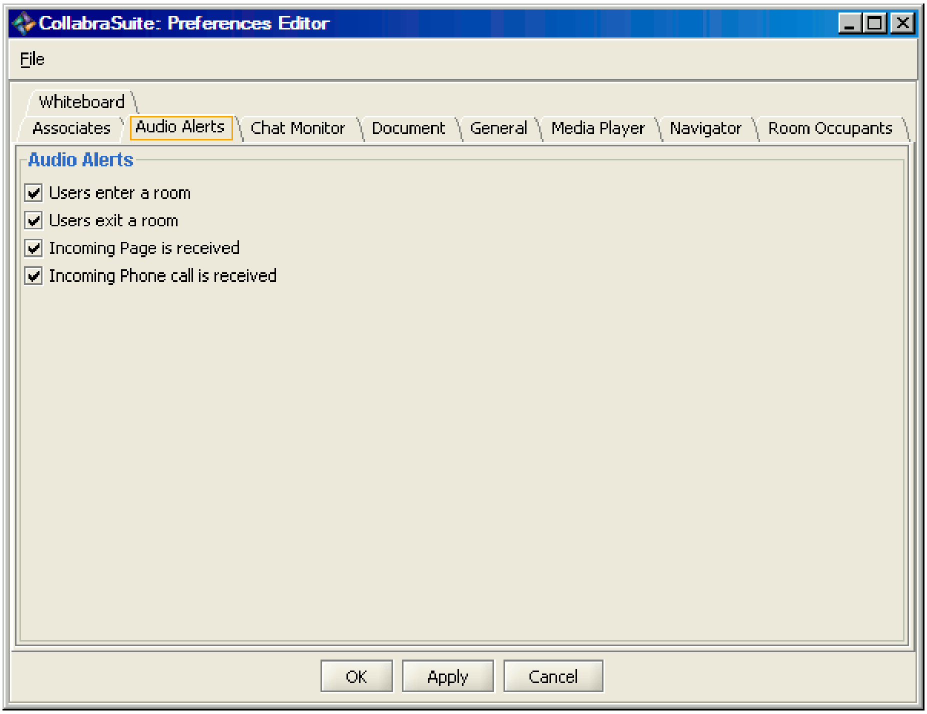
Audio Alerts Preferences

Audio alerts provide audio notifications when certain events occur in the collaborative environment, such as when any other users enter a room or exit a room, when pages are received, or when incoming phone calls are recieved.

To customize audio alerts:

1. Select the **Audio Alerts tab** in the Preferences Editor window.
2. Select the check boxes next to the desired options for audio alerts.

3. Click **Apply** to save the settings for your user account.



Chat Monitor Preferences

The chat monitor is the text area that displays the text chat from a room chat session or a sidebar discussion. Users may choose to add customized idle comment that will appear on the Chat Monitor when they become idle, change the color of the priority icons, enable or disable audio alerts for when chat messages are recieved, or display only chat messages and hide the user enter and exit room events.

To change the idle comment in the chat monitor:

1. Select the **Chat Monitor tab** in the Preferences Editor window.

2. Select an entry from the **Idle Comment pull-down menu,** or type a new entry in the field.
3. Press the enter key or click **Apply** for future reporting of an idle session.

   Note: The last five entries are displayed in the pull down. To reset the Idle Comment field, clear the text field and press the enter key or select Apply.

To display only chat messages:

1. Select the Show Chat Only check box.
2. Click Apply to save the settings for your user account.

The Chat Messages field will now display only chat messages and hide user enter and exit room events.

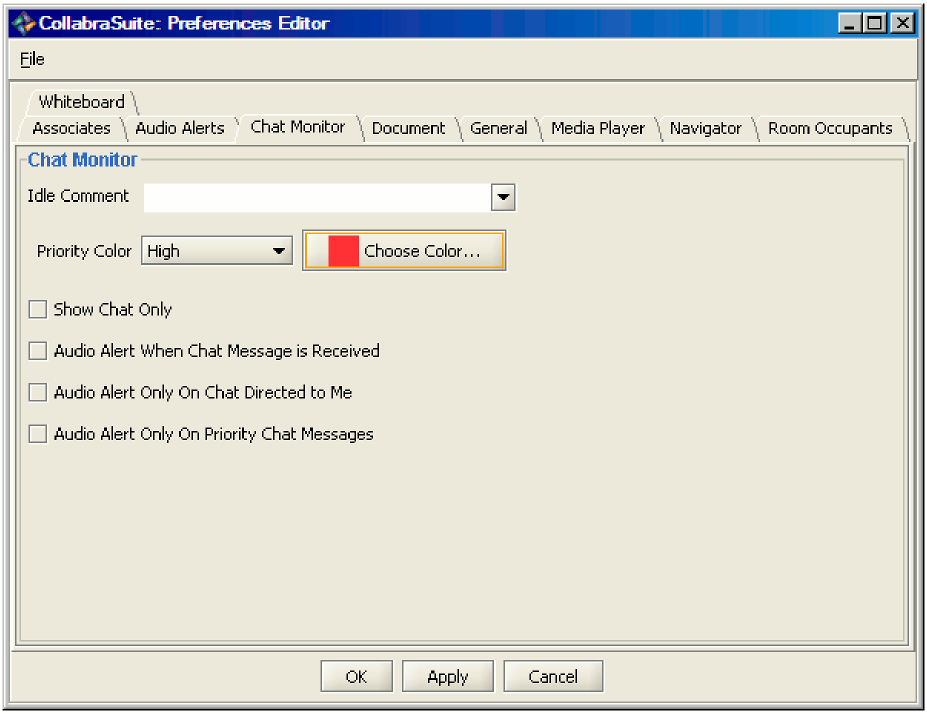
To enable audio alerts for chat messages:

1. Select the **Audio Alert When Chat Message is Received check box.**
2. If priorities are enabled, selecting the **Audio Alert Only on Priority Chat Messages** check box will only cause an audio alert if the chat has a priority assigned to it.
3. If directed chat is enabled, selecting the **Audio Alert Only on Chat Directed to Me** check box will only cause an audio alter if the chat was directed to you.
4. Click **Apply** to save the settings for your user account.

Note: To disable, select the check box again.

To change priority icon color:

1. Select the level of priority, High, Medium, or Low, from the **Priority Color drop-down list.**
2. Click the **Choose Color button** next to the Priority Color drop-down list.
3. Select the color for the chosen priority and click **OK.**
4. Repeat these steps until all desired priorities have been assigned colors.
5. Click **Apply** to save the settings.



Document Preferences

The CollabraSuite BEA Edition document cache temporarily stores documents on the computer for quick access and provides access to documents during network downtime. These settings can be configured to set a new cache location if necessary.

To customize the document management settings:

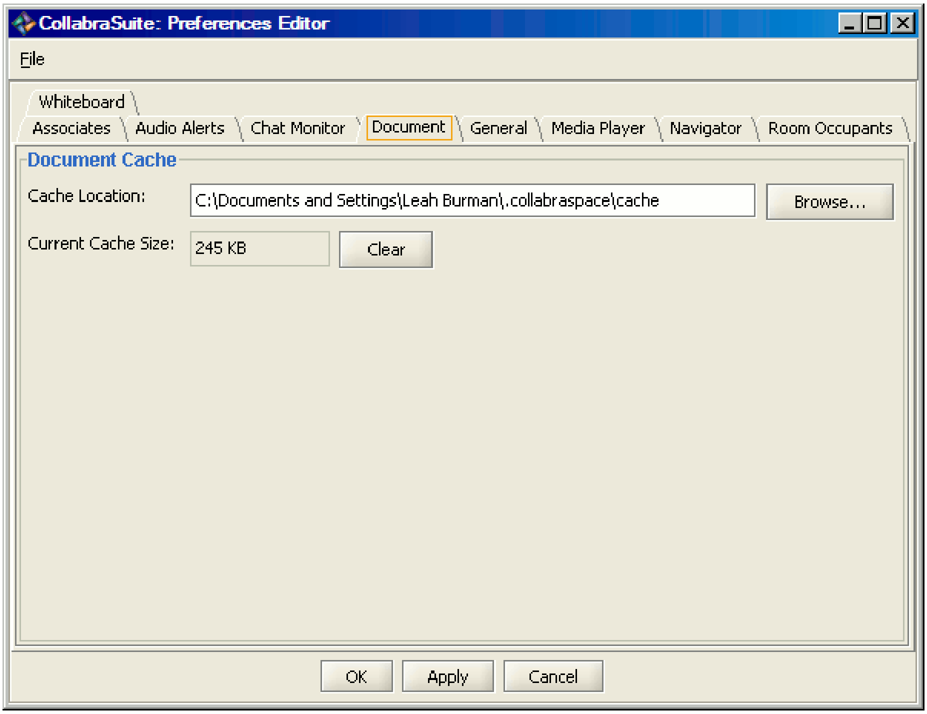
1. Select a new **Cache Location** used by CollabraSuite BEA Edition for temporary storage of documents.

   Note: The new cache location will not take effect until the next browser restart.

2. Click **Clear** to remove items currently stored in the local cache.

Note: The Current Cache Size field displays the amount of storage currently in use by CollabraSuite BEA Edition for temporary document storage.

3. Click **Apply** to save the settings.



Media Player Preferences

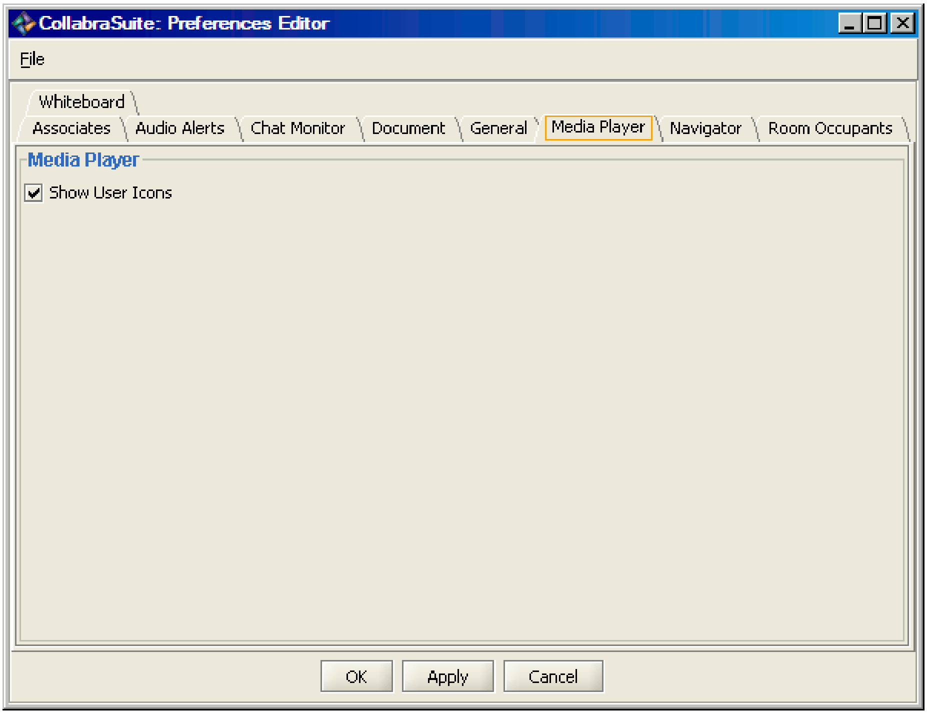
The CollabraSuite BEA Edition media player can be configured to display or hide user icons.

To customize the media player:

1. Select the **Media Player tab** from the Preferences Editor window.

2. Select the **Show User Icons check box** to display the images users have selected for themselves in their user profile.

3. Click **Apply** to save the settings.

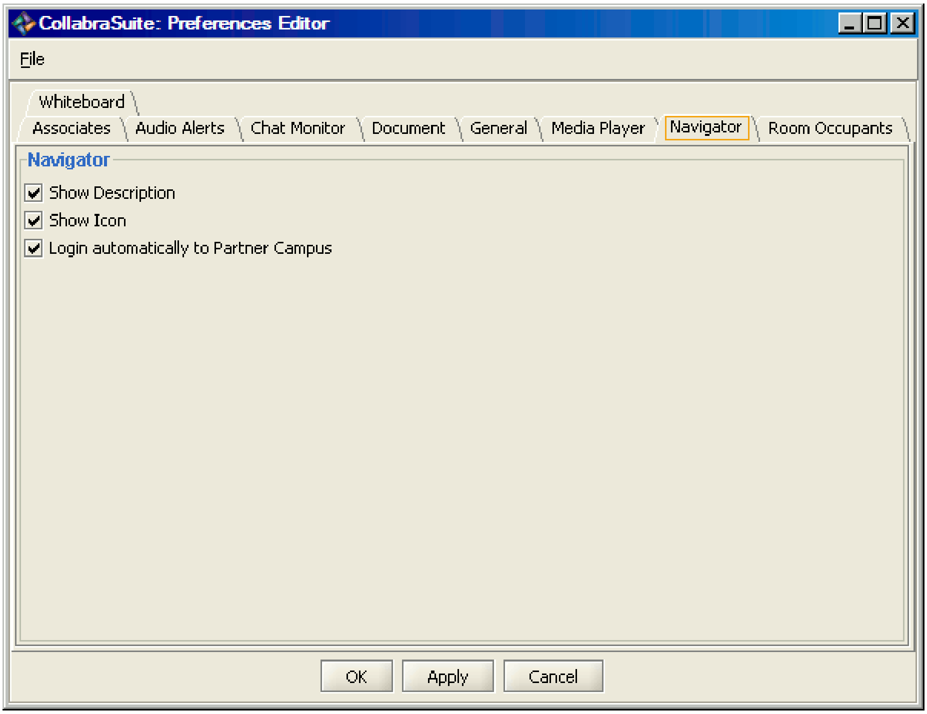


Navigator Preferences

The CollabraSuite BEA Edition Navigator component can be customized individually to display the description area within the Navigator Preferences window, or to display the campus, building, floor, and room icons in the icon section of the Navigator Preferences window. If a user has remote access to any campuses, the user can customize whether to automatically login to the remote campuses.

To change navigator preferences:

1. Select the **Navigator Preferences tab** from the Preferences Editor window.
2. Select the check boxes for the desired options.
3. Click **Apply** to save the settings for your user account.

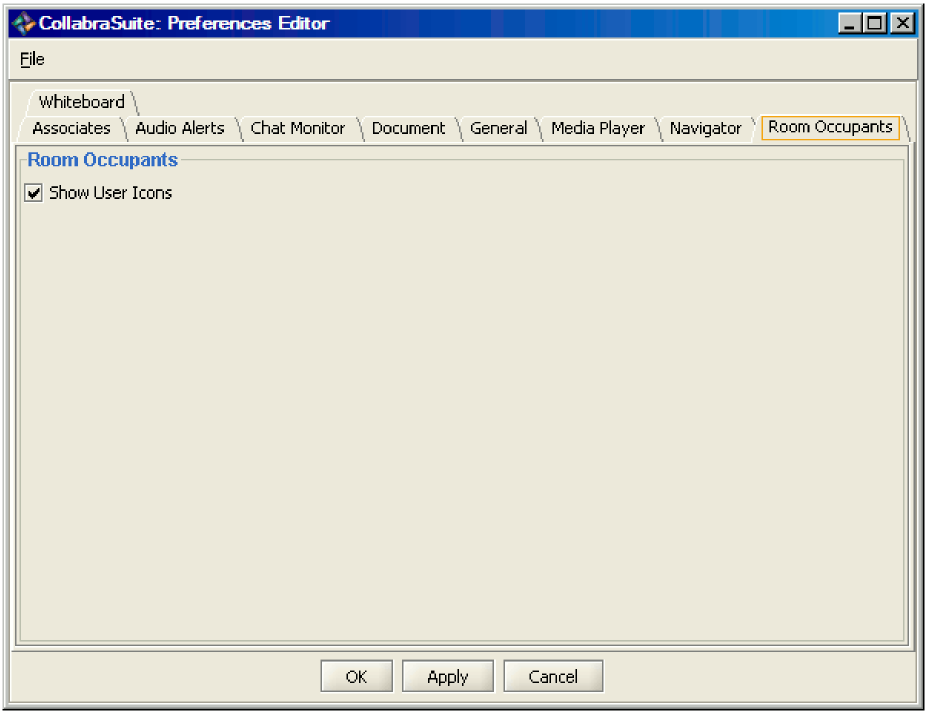


Room Occupants Preferences

The CollabraSuite BEA Edition Room Occupants component can be configured to display or hide user icons.

To customize the Room Occupants component:

1. Select the **Room Occupants tab** from the Preferences Editor window.
2. Select the **Show User Icons check box** to display the images that users have selected for themselves in their user profile.
3. Click **Apply** to save the settings for your user account.

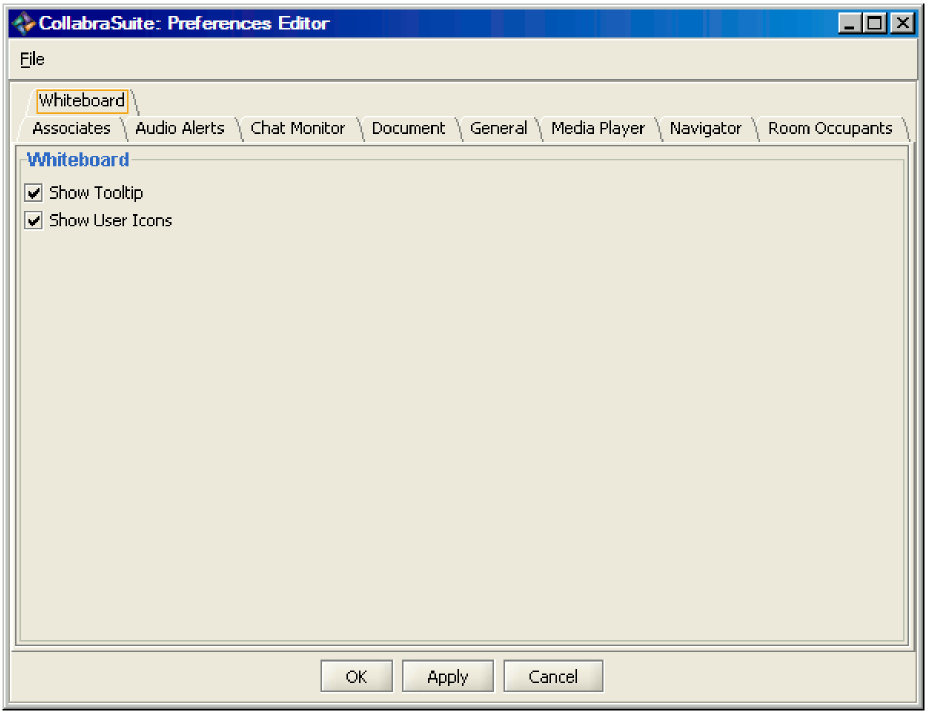


Whiteboard Preferences

The CollabraSuite BEA Edition whiteboard can be configured to hide the tooltips used to report whiteboard annotations, and to display or hide user icons during a whiteboard session.

To customize the whiteboard:

1. Select the **Whiteboard tab** from the Preferences Editor window.
2. Select the check boxes next to the desired Whiteboard options.
3. Click **Apply** to save the settings for your user account.



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