



## **SIEBEL DISTANCE LEARNING GUIDE**

***eBUSINESS APPLICATIONS***

*VERSION 7.0, REV. H*

12-CB90FJ

*JUNE 2002*

Siebel Systems, Inc., 2207 Bridgepointe Parkway, San Mateo, CA 94404  
Copyright © 2002 Siebel Systems, Inc.  
All rights reserved.  
Printed in the United States of America

No part of this publication may be stored in a retrieval system, transmitted, or reproduced in any way, including but not limited to photocopy, photographic, magnetic, or other record, without the prior agreement and written permission of Siebel Systems, Inc.

The full text search capabilities of Siebel eBusiness Applications include technology used under license from Fulcrum Technologies, Inc. and are the copyright of Fulcrum Technologies, Inc. and/or its licensors.

Siebel, the Siebel logo, TrickleSync, TSQ, Universal Agent, and other Siebel product names referenced herein are trademarks of Siebel Systems, Inc., and may be registered in certain jurisdictions.

Supportsoft™ is a registered trademark of Supportsoft, Inc. Other product names, designations, logos, and symbols may be trademarks or registered trademarks of their respective owners.

U.S. GOVERNMENT RESTRICTED RIGHTS. Programs, Ancillary Programs and Documentation, delivered subject to the Department of Defense Federal Acquisition Regulation Supplement, are “commercial computer software” as set forth in DFARS 227.7202, Commercial Computer Software and Commercial Computer Software Documentation, and as such, any use, duplication and disclosure of the Programs, Ancillary Programs and Documentation shall be subject to the restrictions contained in the applicable Siebel license agreement. All other use, duplication and disclosure of the Programs, Ancillary Programs and Documentation by the U.S. Government shall be subject to the applicable Siebel license agreement and the restrictions contained in subsection (c) of FAR 52.227-19, Commercial Computer Software - Restricted Rights (June 1987), or FAR 52.227-14, Rights in Data—General, including Alternate III (June 1987), as applicable. Contractor/licensor is Siebel Systems, Inc., 2207 Bridgepointe Parkway, San Mateo, CA 94404.

**Proprietary Information**

Siebel Systems, Inc. considers information included in this documentation and in Siebel eBusiness Applications Online Help to be Confidential Information. Your access to and use of this Confidential Information are subject to the terms and conditions of: (1) the applicable Siebel Systems software license agreement, which has been executed and with which you agree to comply; and (2) the proprietary and restricted rights notices included in this documentation.

# Contents

## Introduction

How This Guide Is Organized . . . . .	8
Using the Siebel Product . . . . .	8
Revision History . . . . .	8

## Chapter 1. Installing and Configuring the Distance Learning Server

Roles and Responsibilities . . . . .	10
Siebel Distance Learning - Capacity Planning . . . . .	11
Installing Server Components and Extensions for Windows . . . . .	11
Installing Java Runtime Environment . . . . .	12
Installing JRun . . . . .	12
Installing the Siebel Distance Learning Server . . . . .	16
Replacing the License Key File . . . . .	23
Installing Server Components and Extensions for Solaris . . . . .	24
Installing the Java Runtime Environment . . . . .	25
Installing JRun . . . . .	25
Installing the Siebel Distance Learning Server . . . . .	28
Replacing the License Key File . . . . .	29
Configuring the Distance Learning Server URL . . . . .	30

## Chapter 2. Administering the Distance Learning Server

Navigating to the Server Administration Screen . . . . .	32
Server Administration Tasks . . . . .	34
Administering an Account . . . . .	35
Locking Out Selected Addresses and Domains . . . . .	36
Viewing Server Activity Logs . . . . .	38

Administering the License Key .....	39
Cluster Server Administration .....	40
Viewing Active Session Information .....	42
Stopping and Starting Services .....	43
Providing Support Through Firewalls .....	44
About the HTTP Gateway .....	44
About the HTML Viewer .....	46

### **Chapter 3. Administering SDL Sessions**

Navigating to the Session Administration Screen .....	48
Adding a Session .....	49
Creating a Standard Session .....	49
Creating a Custom Session .....	52
Setting up a Cluster Server Session .....	53
Creating a Registration Session .....	55
Creating and Maintaining Breakout Rooms .....	58
Modifying a Session .....	60
Attaching a Document to a Session .....	61
Deleting a Session .....	64
Siebel Distance Learning Accessories .....	65
Session Moderator .....	65
Whiteboards .....	66

### **Chapter 4. Conducting a Distance Learning Session**

Personalizing Your Presence in the Session .....	67
Configuring User Preferences .....	67
Using the Siebel Distance Learning Toolbar to Conduct a Session .....	68
Getting Ready to Conduct a Distance Learning Session .....	70
Starting a Distance Learning Session .....	73
Using the Capture Frame .....	74
Controlling Transmission Content .....	75
Emphasizing Selected Visual Information .....	76

Using Video During a Distance Learning Session . . . . .	77
Providing Audio During a Distance Learning Session . . . . .	78
Optimizing Your Presentation for Slide Shows . . . . .	80
Viewing Attendee Information During a Session . . . . .	82
Using Chat Sessions While Conducting a Distance Learning Session . . . . .	85
Asking Attendees Quiz Questions During a Session . . . . .	88
Using Follow-Me Browsing . . . . .	94
Sharing Presentation Responsibilities . . . . .	95
Recording a Siebel Distance Learning Session . . . . .	96
Ejecting and Locking Out a Participant . . . . .	99
Application Sharing . . . . .	100

## **Chapter 5. Troubleshooting**

Technical Support Information . . . . .	101
Common Problems and Their Solutions . . . . .	102
Error When Downloading the Client . . . . .	102
You Are Prompted for a Password . . . . .	102
Actions Fail with the Error “Action Denied” . . . . .	102
Web Server Installation Error . . . . .	103
Network Errors . . . . .	106
Connection Errors Due to Firewall Restrictions . . . . .	106

## **Chapter 6. Attending a Distance Learning Session**

Navigating Siebel Distance Learning Attendee Screens . . . . .	109
Getting Started for Attendees . . . . .	110
Installing the Distance Learning Client . . . . .	113
Downloading Client Software Automatically . . . . .	114
Downloading Client Software Manually . . . . .	116
Viewing the List of Scheduled Sessions . . . . .	117
Displaying or Hiding Interface Elements . . . . .	118

Using Audio During a Distance Learning Session . . . . .	119
Using the Siebel Distance Learning Toolbar to Attend a Session . . . . .	121
Configuring User Preferences . . . . .	122
Personalizing Your Presence in the Session . . . . .	124
Requesting Attention During a Session . . . . .	126
Using Chat Sessions While Attending a Distance Learning Session . . . . .	127
Responding to Instructor Questions During a Session . . . . .	128
Saving a Copy of On-Screen Information During a Session . . . . .	129
Viewing a Recorded Distance Learning Presentation . . . . .	130

## Index

# Introduction

The purpose of this guide is to explain to Siebel system administrators, training administrators, instructors, and session attendees how to use Siebel Distance Learning.

The audience for this guide consists of the following.

<b>Siebel Distance Learning Administrators</b>	Persons responsible for planning, setting up, and maintaining Siebel Distance Learning sessions and training material.
<b>Siebel Distance Learning Instructors</b>	Persons responsible for hosting Siebel Distance Learning sessions.
<b>Siebel System Administrators</b>	Persons responsible for the entire Siebel deployment, including installing, maintaining, and upgrading Siebel products.
<b>Session Attendees</b>	Persons attending training sessions through Siebel Distance Learning.

Persons responsible for installing and configuring Siebel Distance Learning need a solid understanding of Windows NT Server, Web server software, and networking configuration issues. A working understanding of standard Siebel installation and configuration procedures is strongly recommended.

## How This Guide Is Organized

This guide provides information necessary to implement, configure, and monitor Siebel Distance Learning.

## Using the Siebel Product

It is strongly recommended that you read *Fundamentals* so that you can make optimal use of your Siebel application, especially if you are new to Siebel software. *Fundamentals* provides detailed coverage of the Siebel user interface and how to use it; working with data; locating information with the query and find features; sharing information with other users; and so on. The features presented in *Fundamentals* appear throughout the Siebel application suite; they are introduced through procedures you can learn and use in your own Siebel application.

## Revision History

*Siebel Distance Learning Guide*, Version 7.0, Rev. H



# Installing and Configuring the Distance Learning Server

# 1

Before you start using Siebel Distance Learning, you must read the instructions in this guide for installing, administering, and using the product.

The Siebel Distance Learning module lets users host training sessions, view a list of scheduled training sessions, play recorded presentations, and participate in instructor-led training sessions using corporate intranets or the Internet. The benefits of this solution include reduced training costs for the customer, improved customer satisfaction, and reduced costs of providing end-user support.

Using Siebel Distance Learning, instructors can present live software demonstrations, training presentations, and a host of other training content to students around the world. Siebel Distance Learning attendees can receive just-in-time training on their products, competitors, winning sales techniques, Siebel product features, or any other training topic, without incurring the substantial expense of attending traditional training classes—travel, hotels, time away from the office, and so on. Siebel Distance Learning supports live software demonstrations, slide presentations, online quizzes, interactive Q&A sessions, training document uploading and storage, Voice Over IP, and application sharing.

## Roles and Responsibilities

Several different functional roles are involved in setting up and using Siebel Distance Learning. Depending on how your business is structured, a single person might handle several different roles.

- **Siebel system administrator.** Responsible for installing and configuring Distance Learning. This task must be completed before the training administrator can set up Distance Learning sessions.
- **Training administrator.** Responsible for setting up Distance Learning sessions. In some organizations, the training administrator and the instructor may be the same person.
- **Instructors.** Responsible for hosting Distance Learning sessions.
- **Session attendees.** Participate in Distance Learning sessions.

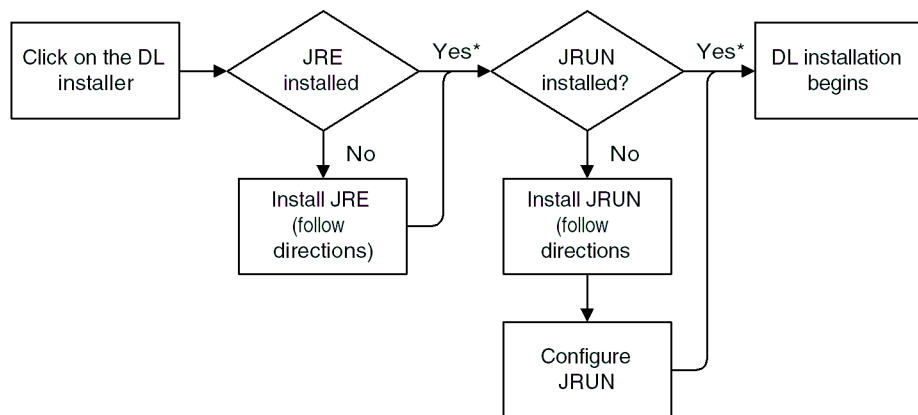
## Siebel Distance Learning - Capacity Planning

For information about capacity planning, see *System Requirements & Supported Platforms*.

## Installing Server Components and Extensions for Windows

The Siebel system administrator must install the Siebel Distance Learning server software and configure the URL location for Siebel Distance Learning. This section provides instructions for these tasks.

If you plan to use Siebel Distance Learning along with Siebel eTraining, which provides a Web-based training management solution, be sure to install and test both Distance Learning and eTraining before allowing users to register for Distance Learning sessions through your eTraining Web site.



\* The installer detects if JRE/JRUN is installed on the server by checking the registry information. If the user wishes to proceed (installer detects no JRE, but JRE is actually installed), they can click Continue.

### Installing Java Runtime Environment

During the Java Runtime (JRun) installation, you will be prompted to install the Java Runtime Environment (JRE) 1.2 or above.

#### **To install Java Runtime Environment**

- 1 Double-click the Distance Learning installer.

If JRE is not detected on the server, it will attempt to open up the browser to the the download page for JRE.

- 2 Download and install JRE.

### Installing JRun

Before installing the Siebel Distance Learning server, you must install JRun 3.0.2 on the same computer on which the Siebel server and the Web server are installed.

---

**CAUTION:** If you have a previous version of JRun, you must uninstall it and delete the physical directory from your computer. You may need to restart your machine to remove the physical directory.

---

#### **To use JRun**

- 1 Uninstall previous versions of JRun.
- 2 Install JRun 3.0.2.
- 3 Configure JRun through the JRun Management Console.

#### **To install JRun 3.0.2**

- 1 Turn off the World Wide Web Publishing service.
- 2 Determine whether port 8000 is open. If it is not, determine an open port for use by JRun.
- 3 Double-click the Distance Learning installer. You will be prompted to install JRun if JRun is not detected on your machine.

The JRun installation wizard Welcome screen appears.

- 4** For each of the following screens and dialog boxes, make the recommended entry, then click Next to continue.

<b>Screen/Dialog Box</b>	<b>Recommended Entry</b>	<b>Comment</b>
Welcome	No entry.	
JRun License Agreement	Yes.	
JRun Product Serial Number	Enter the serial number from the README.txt file on Siebel Distance Learning CD-ROM.	
JRun Installation Folder	Change the destination folder to a folder at the root level of the server machine; for example C:\JRun.	Click Browse, then enter a new folder name or navigate to an existing folder.
Setup Type	Full installation.	
Program Folder	Accept the default or specify another folder.	Setup Status screens display during the subsequent installation.
Install JRun Services	Yes, install JRun services.	
Select a Java Runtime	Select a Java runtime environment, version 1.2 or later.	
JVM Advisor	No entry.	Read the advisory material.
JRun Management Console	Accept default port 8000 or enter an open port number.	See Step 2.
JRun Management Console	Create and enter an administrative password.	Record this password and the administrative user name elsewhere for safekeeping.
JRun Product Information	Enter your contact information, if desired.	
JRun Setup Complete	Select the Start the JRun Management Console, I'll configure my Web server later radio button.	Click Finish, instead of Next.

### Configuring JRun

You must use the JRun Management Console to define how JRun connects to your Web server.

Before configuring JRun determine a free port number that JRun can use and the full path to the scripts directory on the Web server.

#### **To configure JRun with the JRun Management Console**

- 1** Make sure the JRun Admin Server is started and your Web server is stopped.
- 2** If the JRun Management Console login page is not already displayed, choose Start > Programs > JRun 3.0 > JRun Management Console.

The JRun Management Console login page appears.

- 3** Log in with username (admin) and password (*the administrative password you created in the To install JRun 3.0.2*). If the JRun Quick Start Product Tour browser window appears, close it.

The JRun Application Management Console and Server Administration page appears.

- 4** Click the Connector Wizard tab.

The Connector Wizard Step 1 frame appears.

- 5** Make the following entries for Step 1 of the Connector Wizard, then click Next.

<b>Field</b>	<b>Entry Guideline</b>
JRun Server Name	Choose JRun Default Server.
Web Server Type	Enter your Web server type.
Web Server Version	Enter the version of your Web server. The picklist is dependent on your Web server type.
Web Server Platform	Select the platform on which your server runs. The picklist is dependent on your Web server type.

A dialog box warns you to stop your Web server and the World Wide Publishing Service. These services should already be stopped, so click OK.

The Connector Wizard Step 2 frame appears.

- 6** Make the following entries for Step 2 of the Connector Wizard, then click Next.

<b>Field</b>	<b>Entry Guideline</b>
JRun Server IP Address	The default is the IP address for the local host. If JRun and the Web server are on the same machine, accept the default. If they are on different machines, find and enter the IP address of the JRun server machine.
JRun Server Connector Port	Enter the port number the JRun server will use to listen for connections from the Web server.

The Connector Wizard Step 3 frame appears.

- 7** Make the following entries for Step 3 of the Connector Wizard, then click Next.

Field	Entry Guideline
PWS scripts Directory or IIS Scripts Directory	Enter the full path to the scripts directory, as it was configured when the Web server was installed, for example C:\inetpub\scripts.
Install as a Global Filter	Check.

The Connector Wizard Step 4 frame appears, indicating you have successfully configured JRun.

- 8** Click Done, then log out of the JRun Management Console.

## Installing the Siebel Distance Learning Server

To install the Siebel Distance Learning server you need to run the setup program and replace the license key file.

You must install your Siebel Distance Learning server software on the same machine that will act as the Web server for your Distance Learning site. Be sure that you have planned your Web site structure and have installed and tested your Web server software before installing Siebel Distance Learning.

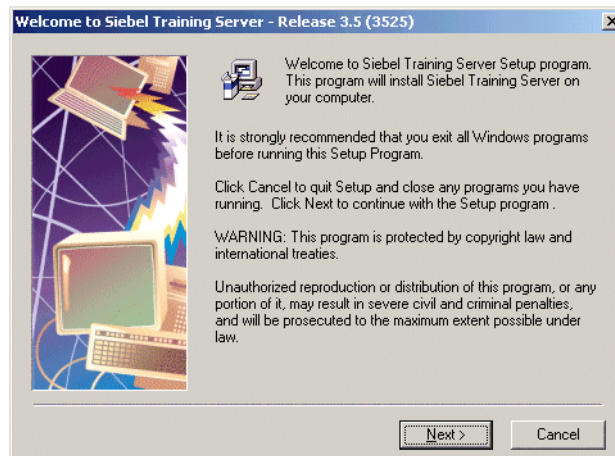
Before installing, you will need two IP addresses if you want to set up the HTTP Gateway. In addition, you must first uninstall any previous versions Distance Learning servers.



#### **To start the installation process**

- 1** Log on to the computer where you want to install the Siebel Distance Learning server software.
- 2** Make sure your user account provides administrator-level privileges on the server.
- 3** Navigate to the Siebel Distance Learning (Windows) directory on your Siebel setup CD-ROM, and double-click the installer name of the Siebel Distance Learning server.
- 4** Select the language.

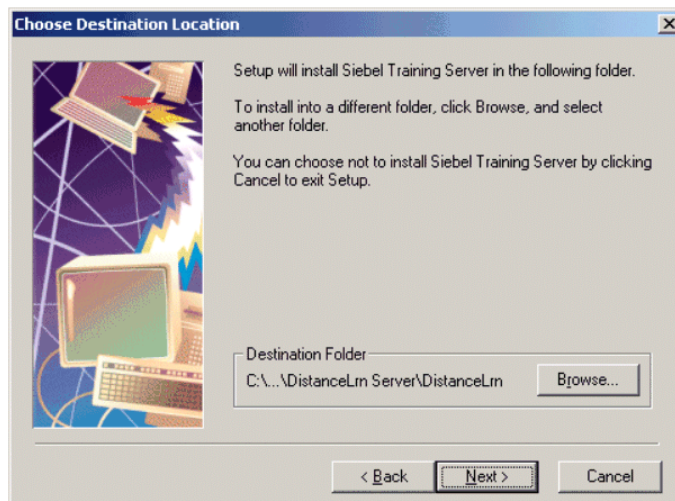
The Welcome dialog box appears.



**5** Click Next to continue the installation.

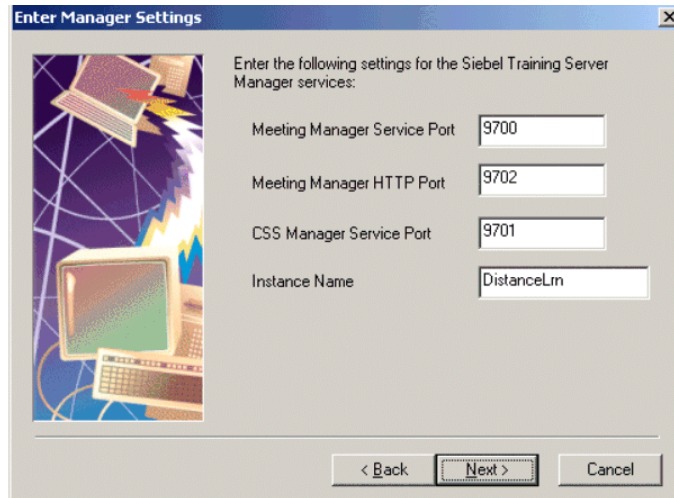
The Select Destination Directory screen appears, prompting you to choose a destination for the server.

- By default, the installer installs the server in the C:\DistanceLrn directory.
- To choose a different directory, navigate through the directory structure until the name of your desired destination appears in the text box. To create a new folder, enter a name in the text box.



**6** Click Next.

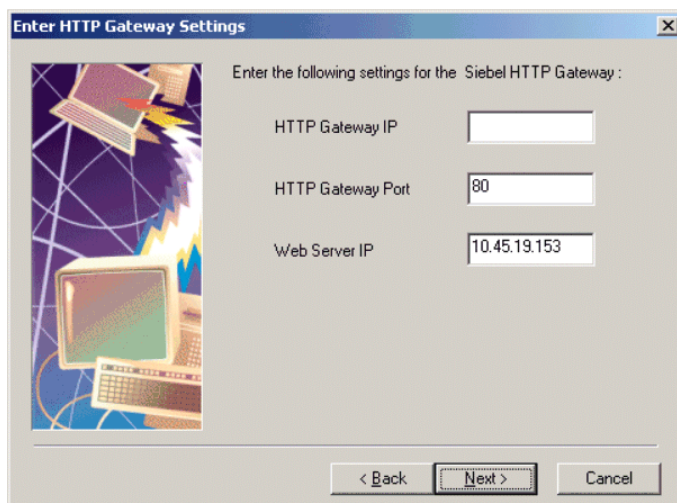
The Enter Manager Settings dialog box appears.



**7** Enter the port numbers you want to assign to the following processes.

Field	Description
Meeting Manager service port	Default port is 9700.
Meeting Manager HTTP port	This is the Web server. The default port is 9702.
Server Manager service port	Default port is 9701.
Instance Name	<p>To configure the server to run with a different instance name, enter the new instance name in the Instance Name field.</p> <p>For example, if the instance name is DistanceLrn, then you will need to browse to <a href="http://&lt;hostname&gt;/DistanceLrn">http://&lt;hostname&gt;/DistanceLrn</a> (where &lt;hostname&gt; is the URL address of your Web server).</p>

- 8 To configure the gateway to run on a specific port, enter the port number in the port for HTTP Gateway Port field, then click Next.



Enter HTTP Gateway Settings

Enter the following settings for the Siebel HTTP Gateway :

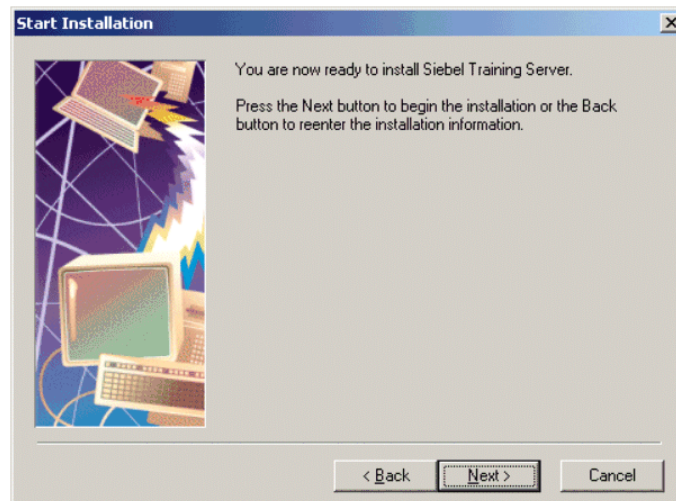
HTTP Gateway IP

HTTP Gateway Port

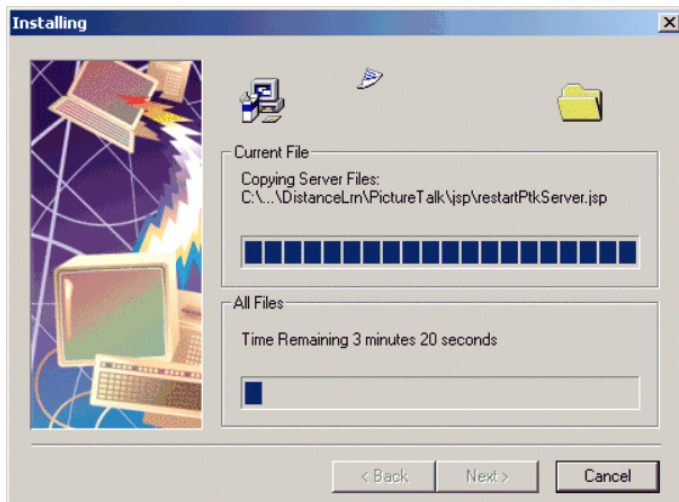
Web Server IP

< Back Next > Cancel

**CAUTION:** Be careful if you choose port 80. Most Web servers are configured to use this port number and will conflict with the HTTP Gateway unless you reconfigure the Web server to use another port. Alternatively, if your Web server software supports virtual IPs, you can then install the HTTP Gateway to bind to port 80 on the virtual IP.



- 9 Click Next.



During the installation, if you are using Netscape Web server, the Siebel Distance Learning installation program may prompt you to configure your Web server to recognize two Distance Learning directories. The following procedure in this chapter provides the necessary configuration instructions. The installation program may also display the instructions on your screen.

The Installation Complete screen appears.

- 10 Restart your machine.

#### **To configure a Netscape iPlanet Web server for Distance Learning**

- 1 Use your browser to navigate to the Netscape Administration server. For example, if your Web server is called myhost and the administration server port is 8080, enter `http://myhost:8080` in the browser.

The Netscape Server Administration screen appears.

- 2 Click the button that is labelled with the name of your Web server host, such as myhost.
- 3 Click the Content Management button near the top of the screen.

- 4** Click the Additional Document Directories link in the left pane.
- 5** Enter the name of the virtual directory for your Distance Learning Web site in the URL Prefix field in the right pane.

For example, if you want Web users to access Distance Learning at `http://myhost/DistanceLrn`, enter `DistanceLrn` in the URL Prefix field.

- 6** If you used `C:\DistanceLrn` as your destination directory when you installed the Distance Learning server software, enter `C:\DistanceLrn\DistanceLrn` in the Map to Directory field.

Otherwise, substitute the drive letter and name of your installation directory for `C:\DistanceLrn`, so that your entry uses the form `X:\install_dir\DistanceLrn`.

- 7** Click OK, then click Save and Apply.
- 8** Click Programs near the top of the screen.
- 9** Enter `DistanceLrn/ptk-apps/meetings/cgi-bin` in the URL Prefix field in the right pane.

If you used a directory name other than `DistanceLrn` in Step 5, substitute the directory name you used.

- 10** Enter `C:\DistanceLrn\DistanceLrn\ptk-apps\meetings\cgi-bin` in the CGI Directory field.

If you used a directory other than `C:\DistanceLrn` in Step 6, substitute the directory name you used.

- 11** Click OK, then click Save and Apply.

## Replacing the License Key File

After you have completed the installation of your server software and have done any additional configuration required for a Netscape iPlanet Web server, you must replace the default Siebel Distance Learning license key file.

For information about license keys, see [“Administering the License Key” on page 39](#).

# Installing Server Components and Extensions for Solaris

Before installing the server components and extensions for Solaris, you should complete the following requirements:

- Verify that your server has sufficient disk space and memory available.
- Verify that the machine has DNS working correctly with a valid IP address and host name.
- If you want to install the HTTP Gateway, make sure a second IP address is configured.
- Verify, you have root access to install the server. If you are not logged in as root, you can switch to root using the following command: `su-root`.

You also need to enter the superuser password for the machine. If you do not have the correct password you will not be able to install the server correctly. Contact the administrator or owner of the machine before proceeding.

- Verify you have iPlanet (only Server Core is necessary) installed on your server.
- Verify you have JRE 1.2.1 or above installed on your server.

---

**NOTE:** The default installation requires that the Distance Learning server be manually started each time by executing the `S98ptk` script. You can configure the server to automatically execute the script at startup by copying it to the directory `/etc/rc2.d`. The Distance Learning server is started each time the machine is booted.

---



## Installing the Java Runtime Environment

During the Java Runtime (JRun) installation, you will be prompted to install the Java Runtime Environment (JRE) 1.2 or above.

These instructions are based on Java 2 Runtime Environment, Standard Edition, Version 1.3.1.

### **To install the Java Runtime Environment**

- 1** Navigate to Sun Microsystem's Web site and download the JRE installer to the directory where you are installing the Distance Learning server.
- 2** To verify the installation file is an executable file, run the following command:  
`chmod a+x <filename for JRE installer> .`
- 3** Run the JRE installer.

## Installing JRun

Before installing the Siebel Distance Learning server, you must install JRun 3.0.2 on the same computer on which the Siebel server and the Web server are installed.

---

**CAUTION:** If you have a previous version of JRun, you must uninstall it and delete the physical directory from your computer. You may need to restart your machine to remove the physical directory.

---

### **To install JRun 3.0.2**

- 1** Locate the installation file from the CD and run the command `jr302.u.sh`.
- 2** Specify the directory in which you would like to install JRun. It does not have to be the same directory as the Distance Learning server.
- 3** To select the number of installation to be performed, select [1] for Typical.

- 4 To specify where the JRE is installed, enter the directory in which you installed JRun.

---

**NOTE:** If you have installed JRE 1.3.1, it may say “No information is available for this JVM.” Ignore this message and proceed with your installation.

---

- 5 To enter a license key for JRun, first locate the license key. The license key is located in the same directory folder as the README.txt file.

- 6 Enter the JRun Admin user password.

The JRun port can be kept at the default: port 8000 or you can specify a different port available on your server.

### Configuring JRun

You must use the JRun Management Console to define how JRun connects to your Web server.

Before configuring JRun determine a free port number that JRun can use and the full path to the scripts directory on the Web server.

#### ***To configure JRun with your Web server***

- 1 Make sure the JRun Admin Server is started and your Web server is stopped.
- 2 Open up a browser, and go to http: < server > : < port number you selected for JRun > .

- 3** Make the following entries for Step 1 of the Connector Wizard, then click Next.

<b>Field</b>	<b>Entry Guideline</b>
JRun Server Name	Choose JRun Default Server.
Web Server Type	Enter your Web server type.
Web Server Version	Enter the version of your Web server. The picklist is dependent on your Web server type.
Web Server Platform	Select the platform on which your server runs. The picklist is dependent on your Web server type.

A dialog box warns you to stop your Web server and the World Wide Publishing Service. These services should already be stopped, so click OK.

The Connector Wizard Step 2 frame appears.

- 4** Make the following entries for Step 2 of the Connector Wizard, then click Next.

<b>Field</b>	<b>Entry Guideline</b>
JRun Server IP Address	The default is the IP address for the local host. If JRun and the Web server are on the same machine, accept the default. If they are on different machines, find and enter the IP address of the JRun server machine.
JRun Server Connector Port	Enter the port number the JRun server will use to listen for connections from the Web server.

The Connector Wizard Step 3 frame appears.

- 5 Make the following entries for Step 3 of the Connector Wizard, then click Next.

Field	Entry Guideline
Netscape https-xxx Directory	Select the directory under which iPlanet is installed, and select httpd- < machine name > (For example: / directory/iplanet/httpd-test.siebel.com if test.siebel.com is the machine)
Native or Java Connector	Select Native

The Connector Wizard Step 4 frame appears, indicating you have successfully configured JRun.

- 6 Click Done, then log out of the JRun Management Console.

## Installing the Siebel Distance Learning Server

To install the Siebel Distance Learning server you need to run the setup program and replace the license key file.

You must install your Siebel Distance Learning server software on the same machine that will act as the Web server for your Distance Learning site. Be sure that you have planned your Web site structure and have installed and tested your Web server software before installing Siebel Distance Learning.

Before installing, you will need two IP addresses if you want to set up the HTTP Gateway. In addition, you must first uninstall any previous versions of Distance Learning servers.

### **To start the installation process**

- 1 Locate the installation file from the CD.
- 2 Execute the setup application.

The first screen of the Distance Learning sever install application appears showing the release and build number of the server.

- 3 We recommend installing the server into opt/DistanceLrn but it can be installed in any directory.

Once selected, the Installer will check several items before proceeding. This step may take a while.

- 4** Specify the IP address for your Web server. The default should be the correct IP.

It is critical that this information is accurate or the Siebel Distance Learning Web pages will not appear correctly.

- 5** Provide an IP address for the HTTP Gateway server.

- 6** Enter the port number you wish to use for the HTTP Gateway server.

The HTTP Gateway server allows clients to easily connect through firewalls. If you have selected the same IP address for the HTTP Gateway and Web server, you will not be able to use port 80. If you want to use port 80 to maximize the capabilities of the HTTP Gateway, you must have an additional IP address.

- 7** The installer now completes the installation and configures all of the Web pages and initialization files. This step may take several minutes to complete.

- 8** Siebel Distance Learning Server-iPlanet Configurator. You will be asked for the iPlanet install directory, enter the directory in which iPlanet is installed on the machine. When prompted for the Web server directory, enter the Web server directory.

For example, https- <hostname> .

- 9** Siebel Distance Learning Server-JRun Configurator. You will be asked for the JRun install directory. Enter in the directory in which you installed JRun.
- 10** Verify that the processes started correctly by checking the last lines of the Meeting and Server Managers log files located in the following location in the install directory:
  - DistanceLrn/ptk-server/log/ptklmgr.log
  - DistanceLrn/PictureTalk/mgr/log/ptkgmgr.log
- 11** Verify that the last lines say, “Connected to” each manager. If they do not, verify that you have chosen the correct IP address settings during installation and that the server is correctly configured to access the IP address.

## Replacing the License Key File

After you have completed the installation of your server software and have done any additional configuration required for a Netscape iPlanet Web server, you must replace the default Siebel Distance Learning license key file.

For information about license keys, see [“Administering the License Key” on page 39](#).

## Configuring the Distance Learning Server URL

Siebel Distance Learning can be accessed either from a Web browser or from the Siebel Web client software. Two settings must be configured to support access through the Siebel client: the location for your Distance Learning home page and the location for the Web page that lists available Distance Learning sessions. Complete the following steps to modify the default URL server location for Siebel Distance Learning. You will need to make updates and configure the URL using Siebel Tools.

### ***To configure the Distance Learning server URL***

- 1** In Siebel Tools, in the Objects Explorer, click Applet > Distance Learning Links Applet object.
- 2** Click Control > Control Object > Control User Prop.
- 3** Modify LinkDistanceLearningHome and ImageDistanceLearningHome to the URL for the home page: `http:// <host name> /DistanceLrn/`.
- 4** Modify LinkSession and ImageSession to the session list page: `http:// <host name> /DistanceLrn/jsp/browse.jsp`.

# **Administering the Distance Learning Server**

# **2**

This chapter provides information on tasks a server administrator would perform while monitoring and maintaining the Siebel Distance Learning server. Typically, these tasks involve account administration, license key information, clustered servers, and any services on the server. Additionally, the server administrator could be responsible for providing support through firewalls, monitoring active sessions, and locking out specific IP addresses or domains.

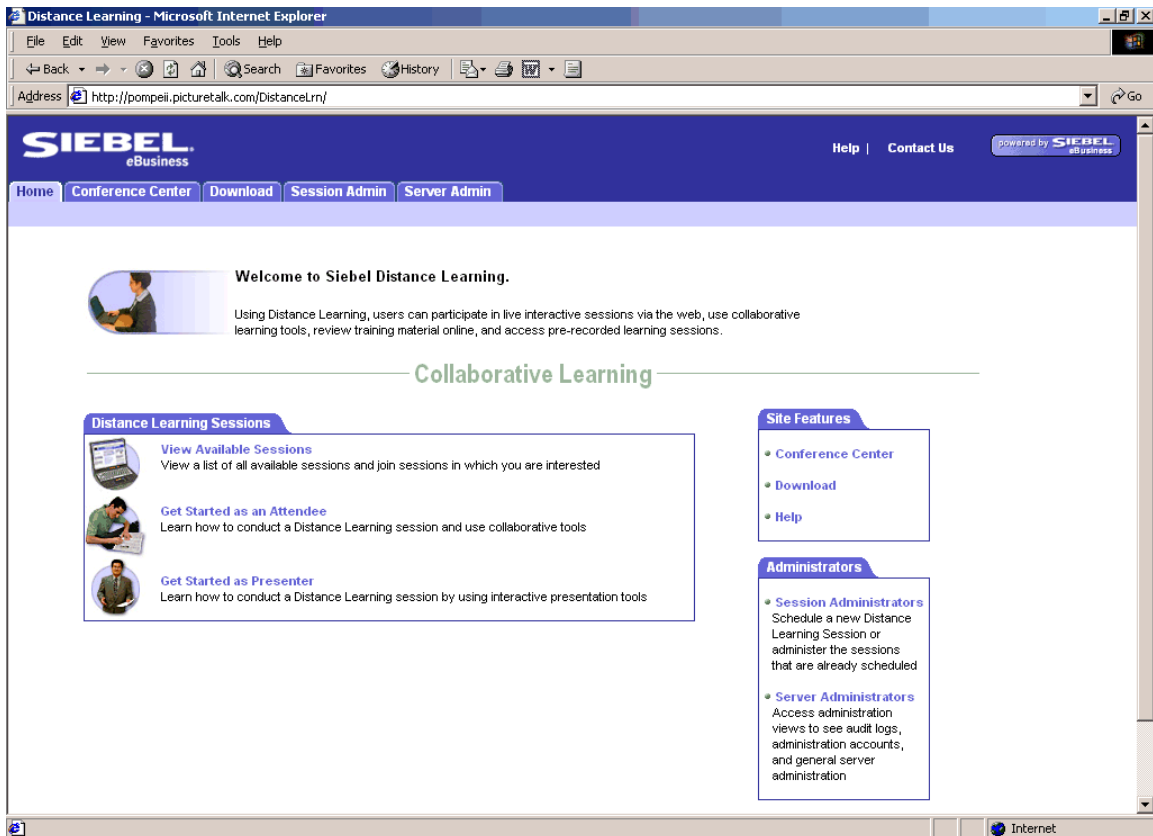
# Navigating to the Server Administration Screen

The Server Administration screen allows you to access Distance Learning Web pages where you can perform server administration tasks. The following procedure describes how to get to the Server Administration screen.

### To navigate to the Server Administration screen from a URL

- 1 Start your Web browser and enter the URL for your Siebel Distance Learning home page. From within the Siebel application's Site Map, click the Siebel Distance Learning hyperlink, then click the Distance Learning Home hyperlink.

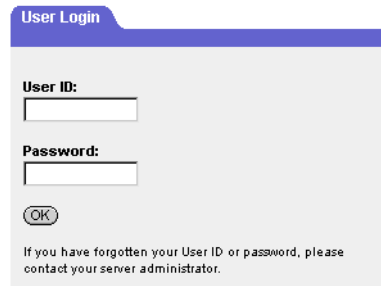
The Siebel Distance Learning home page appears.





- 2** Click the Server Admin screen tab.

The User Login form appears.

The image shows a 'User Login' form with a purple header. It contains two input fields: 'User ID:' and 'Password:'. Below the password field is an 'OK' button. At the bottom, there is a note: 'If you have forgotten your User ID or password, please contact your server administrator.'

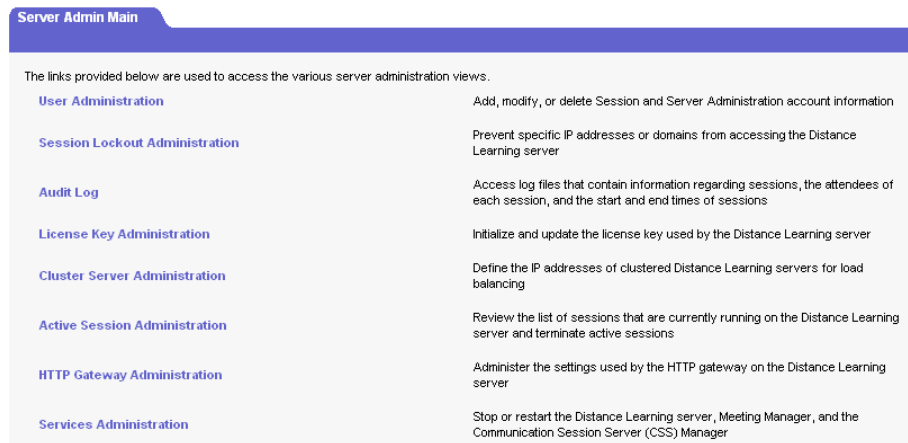
- 3** In the User Login form, enter your User ID and Password and click OK.

The first server administrator to log on to Siebel Distance Learning will need to use the default values that are already in the system.

User ID:           sadmin

Password:         sadmin

The Server Admin Main page appears.

The image shows the 'Server Admin Main' page with a purple header. Below the header, there is a list of links and their descriptions. The links are: 'User Administration', 'Session Lockout Administration', 'Audit Log', 'License Key Administration', 'Cluster Server Administration', 'Active Session Administration', 'HTTP Gateway Administration', and 'Services Administration'. The descriptions are: 'Add, modify, or delete Session and Server Administration account information', 'Prevent specific IP addresses or domains from accessing the Distance Learning server', 'Access log files that contain information regarding sessions, the attendees of each session, and the start and end times of sessions', 'Initialize and update the license key used by the Distance Learning server', 'Define the IP addresses of clustered Distance Learning servers for load balancing', 'Review the list of sessions that are currently running on the Distance Learning server and terminate active sessions', 'Administer the settings used by the HTTP gateway on the Distance Learning server', and 'Stop or restart the Distance Learning server, Meeting Manager, and the Communication Session Server (CSS) Manager'.

You have now navigated to the Server Administration screen and are ready to begin performing the server administration tasks.

# Server Administration Tasks

Typically, a server administrator would be responsible for the following tasks:

- Administering accounts for session administrators and server administrators
- Managing, adding, and deleting sessions
- Locking out specific IP addresses or domains
- Monitoring the activity on the Distance Learning server
- Administering license key information
- Administering clustered servers that are used for load balancing
- Administering active sessions
- Administering services on the server
- Providing support through firewalls

## Administering an Account

You can add, modify, or delete Session and Server Administration account information. Only sadmin, the root account, can make changes to other accounts. In other cases, only the administrator who created an account can make changes to that account. You can add either a session administrator account or a server administrator account. If you are a session administrator, you can only add session administrators.








### To add a new administration account

- 1 Navigate to the Server Administration screen as described in [“To navigate to the Server Administration screen from a URL” on page 32.](#)
- 2 Click the User Administration hyperlink.

The User Administration page appears.

#### User Administration

You can add, modify, and/or delete Session and Server Administration account information. In order to create a new account, please click on the New button. Clicking on the Edit icon will allow you to modify your account information, and Delete icon will delete the account. You can only change your own account information unless you are the Admin user.

Admin Users				
<input type="button" value="New"/> <input type="button" value="Cancel"/>				
User Name	Delete	Edit	Session Admin	Server Admin
Admin			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Instructor			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Siebel			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System			<input type="checkbox"/>	<input checked="" type="checkbox"/>

Copyright © 2001 Siebel Systems, Inc. - All Rights Reserved

- 3 In the Admin Users list, click New.

The Admin Info form appears.

Admin Info	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	
*required	
User Name: *	<input type="text"/>
Password: *	<input type="password"/>
Confirm Password: *	<input type="password"/>
Session Administrator:	<input checked="" type="checkbox"/>
Server Administrator:	<input type="checkbox"/>

**4** In the Admin Info form, enter the information requested in the fields.

**5** Click Save.

The Admin Users list appears. Your new account should be listed, along with any other accounts that have already been added.

#### **To make other changes to an account from the Admin Users list**

- To modify one of your accounts, click the Edit icon of the account you want to modify and change the information.
- To delete one of your accounts, click the Delete icon of the account you want to delete and click OK at the warning prompt.
- To make changes to other users' accounts, use the following User ID and Password when logging on to the Server Administration screen.

User ID:     sadmin

Password:   sadmin

## Locking Out Selected Addresses and Domains

You can lock out specific IP addresses or domains from accessing the Siebel Distance Learning server by including the address or domain in the lockout list.

When locking out a domain, you can enter the specific domain (such as siebel.com) or a text string (such as Siebel).

---

**CAUTION:** While the Siebel Distance Learning application can lock out most IP addresses or domains, it is not possible to guarantee that IP addresses or domains can be locked out. Before starting a session, you should check the Audit Log to determine who is attending. As soon as you begin a session, you should lock out the session to provide maximum security for the session.

---

#### **To lock out an IP address or domain**

- 1** Navigate to the Server Administration screen.
- 2** Click the Session Lockout Administration hyperlink.

The Server Lockout Page appears.

- 3 Enter the IP address or domain information that you want to prevent from accessing the Siebel Distance Learning server.
  - In the Locked Out IP Addresses field, enter any IP address that you want to prevent from accessing the Siebel Distance Learning server and click Add.
  - In the Locked Out Domains field, enter the domain that you want to prevent from accessing the Siebel Distance Learning server and click Add.

The screenshot shows two sections of the Siebel Distance Learning server administration interface. The top section is titled 'Locked Out IP Addresses' and contains an 'Add' button, a 'Cancel' button, and a 'Delete' button. Below this is a table with one row containing 'IP Addresses' and 'Delete'. The bottom section is titled 'Locked Out Domains' and contains an 'Add' button, a 'Cancel' button, and a 'Delete' button. Below this is a table with one row containing 'Domains' and 'Delete'.

The Siebel Distance Learning application attempts to lock out the IP address or domain information that you entered. This information appears under the appropriate list, along with any other IP addresses or domains that have already been locked out.

**NOTE:** The lock out check will take place when you start the session and NOT when you lock the domain. For example, if a session is already going on, and you lock out a domain, users from that domain will still be able to join that session. If the user starts a new session, the user will not be able to join the session.

**CAUTION:** While the Siebel Distance Learning application can lock out most IP addresses or domains, it is not possible to guarantee that IP addresses or domains can be locked out. In cases where the computer is located behind a firewall/NAT or uses DHCP, it may not be able to lock out the specified IP address.

## Viewing Server Activity Logs

As an administrator, there will be times when you need to view the activity on your Distance Learning server. For example, you may need to perform routine maintenance on the Distance Learning server. The options in the Views drop-down list allow you to see specific types of activities on the server, such as how many sessions have been created, who is attending the sessions, if any sessions are currently active; or you can look at activity on the server.

You can save this data to a comma separated values (.csv) file. A .csv file is a text file containing tabular data that can be imported into a spreadsheet application, such as Microsoft Excel.

### **To view and download an audit log report**

- 1** Navigate to the Server Administration screen.
- 2** Click the Audit Log hyperlink.

The Audit Log - Session Attendee Details view appears.

- 3** From the Views drop-down list, select the option that contains the desired information. You can choose from the following options:
  - Create: A list of the sessions that have been created on the server
  - Session Attendees Details: User usage information
  - Session Start/End: Start and end times of sessions
  - Complete Log: Activities on the server

The selected view appears.

- 4** If you wish, click Save as CSV to save the data as a .csv file.

## Administering the License Key

Each Siebel Distance Learning server requires the use of a license key after the server software is installed in order for the software to function. You can use License Key Administration screens to update your license key or to view your current license key information. When you update a license key, the Distance Learning server services automatically restart after the update. This helps make sure that the new license key takes effect. If you are using the License Key Administration option, your previous license keys are backed up each time you add a new key.

### To view previous license key information

- 1 Navigate to the Server Administration screen.
- 2 Click the License Key Administration hyperlink.

The License Key Update page appears. The current license key information for the Siebel Distance Learning application appears in the lower half of the page.

#### License Key Update

You can initialize this view to update your license key information by entering the license key in the blank field below, then clicking on the Save button. You can also view your current license key information. If you are adding an updated license key, the Distance Learning server services will automatically be restarted after you click save to ensure the new license key will take effect. Your license keys will be backed up each time you add a new key. You can access this information by clicking on the View Previous button.

The screenshot shows a web browser window titled "License Key Update". At the top, there is a blue header bar with three buttons: "Save", "View Previous", and "Cancel". Below the header, the main content area has a label "Update License Key Here:" followed by a large, empty text input field with a vertical scrollbar on the right side.

- 3 In the License Key Update list, click View Previous.

The License Key Restore Files list appears. License keys that you previously entered are stored in this list.

- 4 If you want to restore a previous license key, click the Restore icon for the previous license key in the License Key Restore Files list.

#### **To update your license key information**

- 1 Navigate to the Server Administration screen.
- 2 Click the License Key Administration hyperlink.

The License Key Update page appears. The current license key information for the Siebel Distance Learning application appears in the lower half of the page.

- 3 In the License Key Update form, enter the new license key information.
- 4 Click Save.

The Siebel Distance Learning application updates the license key.

## Cluster Server Administration

If you expect to have many concurrent users of your Siebel Distance Learning system, you may want to cluster two or more servers together to balance the load. In each server cluster, one server is designated as the cluster server and the other servers are known as remote servers. For each clustered server, you need to enter the cluster server's IP address and port number along with a remote server's IP address and port number.

#### **To define IP addresses for clustered Distance Learning servers**

- 1 Navigate to the Server Administration screen.
- 2 Click the Cluster Server Administration hyperlink.

The Cluster Server Administration page appears.

#### **Cluster Server Administration**

You can define the IP addresses of the Distance Learning servers that are going to be clustered together to load balance the users across multiple servers.

The screenshot shows a web form titled "Cluster Server Administration". At the top, there are "Save" and "Cancel" buttons. Below them is a legend: "\* = Required". The form contains the following fields and labels:

- Cluster Manager Setting:** A radio button group with "On" and "Off" options. A note to the right states: "On" indicates that the cluster server setting will be turned on.
- Cluster Manager Port:** A text input field with an asterisk. A note to the right states: "Port number of for this server (Recommended port is 9503)".
- Remote Cluster Server IP Address:** A text input field with an asterisk. A note to the right states: "IP Address of the remote cluster manager".
- Remote Cluster Server Port:** A text input field with an asterisk. A note to the right states: "Port number you assigned on the cluster server you wish to use".



- 3** Select one of the servers to be clustered with, and enter the IP address and port number for the server.

For example, there are two servers, Server A and Server B. On Server A, enter Server B's IP address and port number. On Server B, enter Server A's IP address and port number.

Then, in order to cluster Server C, on Server C, simply enter either Server A or Server B's IP address and port number. The servers will intelligently detect that now Servers A, B, and C are clustered together.

- 4** Click Save.
- 5** Repeat this procedure on each server in the cluster.

---

**NOTE:** You will need to restart the Distance Learning services to activate the cluster services.

---

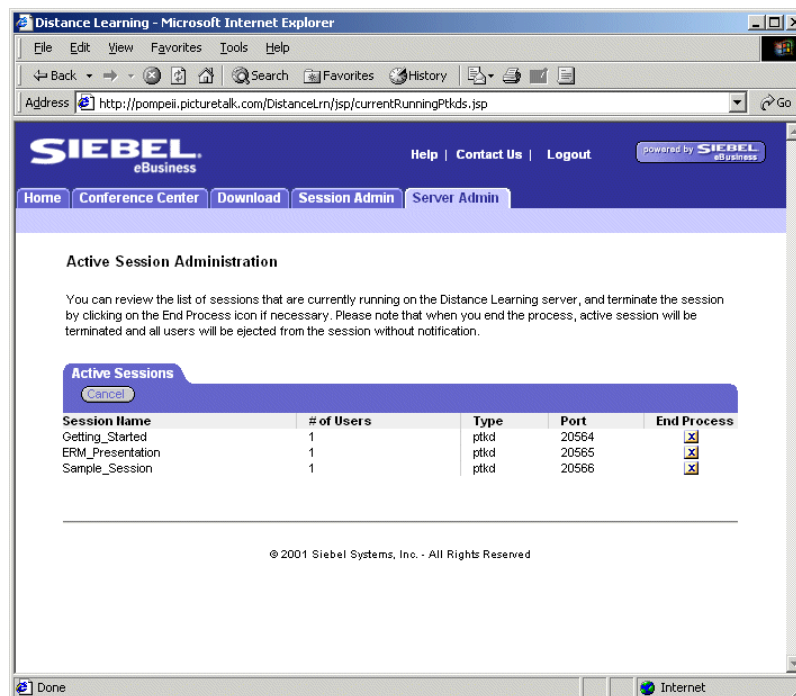
## Viewing Active Session Information

You can use Active Session Administration screens to review the list of sessions that are currently running on the Distance Learning server, and to terminate a session if necessary. Terminating an active session ejects users from the session without notification.

### To view the list of active sessions

- 1 Navigate to the Server Administration screen.
- 2 Click the Active Session Administration hyperlink.

The Active Session Administration page appears.



The Active Sessions list shows sessions currently active.

**To terminate an active session**

- 1 Navigate to the Active Session Administration page.
- 2 In the Active Sessions list, click the End Process icon of the session you want to terminate.

## Stopping and Starting Services

You can start, stop, and restart Distance Learning servers, Meeting Manager and the Communication Session Server (CSS) Manager as necessary. In most cases, you will need to restart both servers, but you can stop and restart each individual server as well.

---

**CAUTION:** Make sure no sessions are in progress. If there are, wait or terminate sessions by ending active sessions.

---

**To stop, start, or restart a service**

- 1 Navigate to the Server Administration screen.
- 2 Click the Services Administration hyperlink.

The Services Administration page appears.

**Services Administration**

You can stop and restart all the Distance Learning Servers, Meeting Manager and the Communication Session Server (CSS) Manager as necessary. In most cases, you will need to restart both servers, but there are options to stop and restart each individual server as well.

The screenshot shows a web interface titled "Services" with a "Cancel" button. Below the title, there are three rows of controls:

Service	Restart	Stop	Start	Description
All Distance Learning Services on this Server	[Restart]	[Stop]	[Start]	Stopping this server will terminate all sessions
Meeting Manager	[Restart]	[Stop]	[Start]	Handles the posting and managing of all the interactive elements
CSS Manager	[Restart]	[Stop]	[Start]	Handles and updates the connections to each session

- 3 In the Services form, click the appropriate button to stop, start, or restart a service.

## Providing Support Through Firewalls

Both instructors and session attendees use standard Web browsers to locate Siebel Distance Learning sessions. When the instructor or attendee clicks a session hyperlink, the Distance Learning server checks for the presence of Distance Learning client software on the computer that is attempting to join the session. If the client software is not present, the Distance Learning server automatically downloads the required client software to the computer joining the session.

When the download is complete, the Distance Learning client software starts up and allows the user to join the Distance Learning session. Once the connection is established, the instructor or attendee uses the Distance Learning client software, to participate in most session activities. However, if a prospective session attendee's computer is located behind a restrictive networking firewall, it may not be possible to join the Distance Learning session and receive transmissions from the instructor's computer in the usual way.

If the Distance Learning client software cannot connect to the Distance Learning server using the standard method, the Distance Learning client software will automatically try to use an HTTP Gateway connection to the server. If the preceding methods are not successful, the client software will try to connect using an HTML Viewer to participate in the session in a more limited way.

### About the HTTP Gateway

If the Distance Learning server is configured to provide HTTP Gateway functionality, a prospective session attendee who is located behind a firewall can choose to have his or her Distance Learning client software use an HTTP Gateway connection. Such a connection provides full functionality to the attendee during the Distance Learning session, but performance may be slower than a regular Distance Learning TCP/IP socket connection would provide. The following procedure describes how to provide HTTP Gateway functionality on your Siebel Distance Learning server.

### To configure an HTTP Gateway

- 1 Navigate to the Server Administration screen.

**NOTE:** For information on navigating in Siebel Distance Learning, see [“Navigating to the Server Administration Screen” on page 32.](#)

- 2 Click the HTTP Gateway Administration hyperlink.

The HTTP Gateway Administration page appears.

#### HTTP Gateway Administration

The following information is the setting used by the HTTP Gateway on the Distance Learning Server. All information needs to be filled out if you wish to use the HTTP Gateway.

- 3 In the HTTP Gateway form, enter the requested information. You are required to provide an additional IP Address.
- 4 Click Save.

Your Siebel Distance Learning server is now configured with the Siebel Distance Learning HTTP Gateway. Attendees behind firewalls now have a better chance of communicating through their firewall's HTTP port.

### About the HTML Viewer

The HTML Viewer provides an alternative for accessing Distance Learning sessions from behind restrictive firewalls. It is also convenient because there is no required download of client software. The HTML Viewer applet allows attendees to view presentations as HTML pages within a Web browser. Attendees who use an HTML Viewer connection can hear the audio portion of the session through a standard telephone conference call, but they *cannot* use the following capabilities of Siebel Distance Learning:

- Presenting (acting as instructor)
- Participating in Application Sharing
- Using Standard Chat Lines or Private Chat (users can receive messages and send messages to everyone)
- Asking Quiz Questions (can answer)
- Recording sessions
- Conducting Follow-Me Browsing (users can follow)
- Hearing audio portion of sessions through Voice Over IP
- Viewing detailed information about other session attendees
- Using the Raise Hand option to notify the instructor that you have a question

---

**NOTE:** The HTTP Gateway should be installed on the Siebel Distance Learning server if you plan to have attendees use the HTML Viewer. For information on performing this installation, see [“To configure an HTTP Gateway” on page 45](#).

---

This chapter provides information on tasks an instructor or session administrator would perform when creating or monitoring Distance Learning sessions:

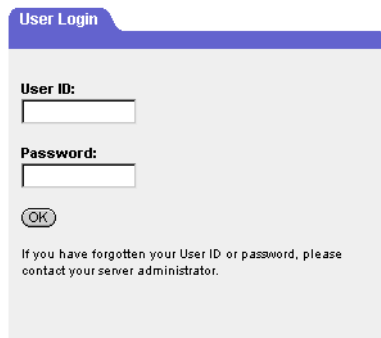
- Adding, modifying, or deleting a standard or custom session
- Attaching a document to a session
- Creating and maintaining breakout rooms
- Using the Session Moderator accessory to monitor the performance of a Distance Learning session
- Using the Whiteboard accessory for shared brainstorming between instructors and attendees

# Navigating to the Session Administration Screen

The Session Administration screen allows you to access Distance Learning Web pages where you can manage Distance Learning sessions. The following procedure describes how to get to the Session Administration screen.

### ***To navigate to the Session Administration screen***

- 1** Start your Web browser and enter the URL for your Siebel Distance Learning home page. From within the Siebel application's Site Map, click the Siebel Distance Learning hyperlink, then click the Distance Learning Home hyperlink.
- 2** Click the Session Admin screen tab.
- 3** In the User Login form, enter your User ID and Password and click OK.

A screenshot of a web browser window showing a 'User Login' form. The form has a purple header bar with the text 'User Login'. Below the header, there are two input fields: 'User ID:' and 'Password:'. Below the 'Password:' field is an 'OK' button. At the bottom of the form, there is a small text line that reads: 'If you have forgotten your User ID or password, please contact your server administrator.'

The Siebel Distance Learning Sessions - Administration View - Main Page appears. You have now navigated to the Session Administration screen and are ready to begin performing the session administration tasks.



## **Adding a Session**

The Siebel Distance Learning application allows session administrators to create standard or custom sessions. The type of session that a session administrator creates generally depends on level of privileges needed by the users or session attendees. In most cases, a standard session will be sufficient; however, if you want to set different levels (usually a limited set) of privileges for attendees, a session administrator can create a custom session.

Furthermore, if you want to be able to give/take away privileges (pointer, audio control, presenter role, application sharing) on the fly, you will need to set custom sessions.

### **Creating a Standard Session**

A standard Distance Learning session is one in which users are granted privileges—the privilege to present information, the privilege to chat, the privilege to turn on the mouse pointer and make its position visible to other users. Although users in a standard session have the privilege to present, only one user at a time can present, either by choosing Presentation > Present or by selecting Raise Hand and having the current presenter click Let Them Present.

This is suitable for interactive sessions, for example, document collaboration, and so on.

### To create a standard session

- 1 Navigate to the Session Administration screen as described in “[Navigating to the Session Administration Screen](#)” on page 48.
- 2 In the Sessions list, click New Session.

The Schedule a New Session form appears.

**Schedule a New Session**

Save Cancel

\* = Required

Session Name: \*

Start Date: \* 06 / 21 / 01

Start Time: \* 00 : 44 PM

Description: \*

Expected # of Attendees: \*

Session Type: \*

- ☒ Standard Session
- ☐ Group Session
- ☐ Multi-Level Session

Require Password to Join: ☐

Show At Once: ☐

Session Administrator Password: \*

Confirm Password: \*

Require Registration: ☐

Cluster Server ID: \*

Automatically Delete Session After: 0 Hours

All attendees have the same privilege

Includes two levels of privileges

Includes three levels of privileges

Required for Group or Multi-Level sessions or if users must enter a password to join

Required if using cluster server for load balancing (Enter ID # for the session)

If left at 0, you must manually delete the session

- 3 In the New Session form, enter the information requested in the fields.

Some of the fields are described in the following table:

Field	Description
Cluster Server ID	Common number used to tie sessions on multiple servers. Typically, this is the ID number for the session. No need to use unless you are using cluster servers.
Expected # of Attendees	This number is only used to provide guidance, not to regulate the scheduling of sessions.
Enable Show at Once Mode	Select if using Show at Once. If not selected, delivers images in a tiling manner (from top left, across and down), but you will not be able to use the Show at Once feature.

Field	Description
Require Password to Join	Select this check box if you enter a password in the Session Administrator Password field, and you want to require that this password be used not only to delete and change a session, but also to join the session.
Require Registration	Select this check box if you want to require users to fill out a registration form before joining a session. For more information, see <a href="#">“Creating a Registration Session” on page 55</a> .
Session Administrator Password	Password controls ability to delete or change this session and is optional for a standard session. You must enter the password two times.
Session Name	Use only alphanumeric characters.
Session Type	Select Standard.

**4** Click Save.

The Siebel Distance Learning application creates the session you described and the Sessions list appears.

Your new session should be listed, along with any other sessions that have already been created.

## Creating a Custom Session

A custom Distance Learning session is one in which users are granted different levels of privileges—some users will have more privileges than other users. Passwords created by session administrators control the level of privileges granted to users. Typically, custom sessions are created when the presenter wants to control the privileges that users can access during a session. For example, in a larger session, the presenter may not want users to be able to turn on their pointers, because this would be distracting to the session.

### **To create a custom session**

- 1 Navigate to the Session Administration screen.
- 2 In the Sessions list, click New Session.

The Schedule a New Session form appears.

- 3 In the New Session form, enter the information requested in the fields.

Some of the fields are described in the following table:

Field	Description
Session Administrator Password	Password controls ability to delete this session and is required for a custom session. The Session Administrator Password provides access to privileges during the session. You must enter the password two times.
Session Type	Select: <ul style="list-style-type: none"><li>■ Group if you are creating a group session. Group sessions are used when you want to control the privileges that attendees can access during a session. Provides two levels of privileges.</li><li>■ Multi-level if you are creating a multi-level session. Multi-level sessions are used when you want to control the privileges that both attendees and presenters can access during a session. For example, attendee and teaching assistant. Provides three levels of privileges.</li></ul>

- 4** Click Save.
  - If you selected a Group Session Type, the Create a Group Session form appears.
  - If you selected a Multi-Level Session Type, the Create a Multi-Level Session form appears.
- 5** Complete the required fields.
- 6** Click Save.

The Siebel Distance Learning application creates the session you described and the Sessions list appears.

Your new session should be listed, along with any other sessions that have already been created.

## **Setting up a Cluster Server Session**

You can use clustered servers that have been set up to accommodate for many attendees. The maximum capacity for the clustered servers is the sum of the server capacity for each server.

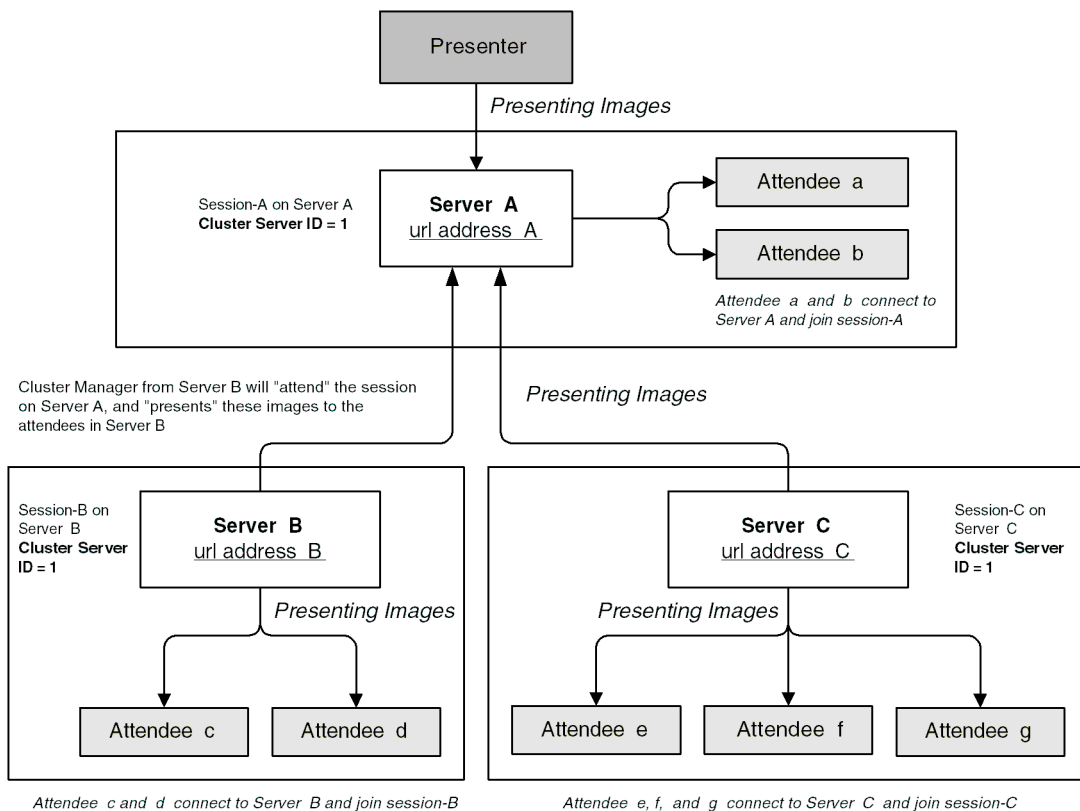
### ***To set up a Cluster Server session***

- 1** Create a session (either Standard or Custom Session) on each server that you will be using.

- 2** In the New Session form, specify a unique Cluster Server ID for the session. The Cluster Server ID is the common number used to tie sessions on multiple servers. Typically, this is the unique ID number for the session.

For example, if you create a session on clustered servers A, B, and C, with Cluster Server ID of 1, these sessions will be connected.

For the users, there will be three different URLs available (for each server) accessing the same session.



## Creating a Registration Session

A registration session is one in which attendees are required to complete a registration form before joining a session. There are three unlisted documents for each registration session:

- The seminar.info document which contains the settings for the different options.
- The seminar.csv document which contains a list of registered users.
- The thankyou.txt document which contains the sample text for email confirmation.

---

**NOTE:** Unlisted document means that the file is not listed in the list. To access the file, in the Search field, enter the exact file name and click Go.

---

### ***To view the list of registered users***

- 1** Navigate to the Attachments page.
- 2** In the Attachments list, search for the seminar.csv file.
- 3** Click the Download icon.

The Attachment Details form appears.

- 4** Click Download.

The seminar.csv document contains a list of registered users.

**To set up a registration session and send an automated email response to registered users**

- 1** If you send email confirmation each time a new registrant registers for the session you will need to edit the seminar.info document to configure the settings.
  - a** Navigate to the Attachments list.
  - b** In the Attachments list, search for seminar.info.
  - c** Click the Download icon.

The Attachment Details form appears.
  - d** Click Download.
  - e** Copy the text to a text editing application, such as Notepad.
  - f** Enter the confirmation address in the following fields:
    - ☐ smtp\_server
    - ☐ smtp\_port
    - ☐ mail file
    - ☐ mail from
    - ☐ mail subject

---

**NOTE:** The content of the confirmation email will be specified in the file that you set for the mail file field.

---

- g** Upload the seminar.info file to the server. Make sure you click the Hide in listings option so that other people will not be able to manipulate the files.



- 2** If you are sending email confirmations to each registered user you will need to edit the `thankyou.txt` file to specify the context of the message you want sent out to your attendees.
  - a** Navigate to the Attachments list.
  - b** In the Attachments list, search for `thankyou.txt`.
  - c** Click the Download icon.

The Attachment Details form appears.
  - d** Click Download.
  - e** Copy the text to a text editing application, such as Notepad.
  - f** Edit the `thankyou.txt` document.
  - g** Save the files and upload them to the server. Make sure you click the Hide in listings option so that other people will not be able to manipulate the files.

For more information on how to upload, see [“Attaching a Document to a Session” on page 61](#).

## Creating and Maintaining Breakout Rooms

Breakout rooms are similar to folders in Windows Explorer. They allow you to organize related sessions into short lists for easier navigation. You create breakout rooms in the Session Administration screen and store them in the Meetings directory on the Siebel Distance Learning server.

### **To create a breakout room**

- 1 Navigate to the Session Administration screen.
- 2 In the Sessions list, click New, which is next to the Breakout Rooms drop-down list.

The Add New Breakout form appears.

- 3 In the Add New Breakout form, enter a name for the breakout room.

---

**NOTE:** It is recommended that you use alphanumeric characters only.

---

- 4 Click Save.

The Siebel Distance Learning application creates the breakout room and the Sessions list appears.

### **To enter a breakout room**

- 1 Navigate to the Conference Center screen.
- 2 From the Breakout Rooms drop-down list, click the name of the breakout room you want to enter.

The Distance Learning window for the breakout room appears.

---

**NOTE:** Attendees can also enter a breakout room directly by typing the URL shown for the breakout room.

---

**To delete a breakout room**

- 1** Navigate to the Session Administration screen.
- 2** In the Sessions list, from the Breakout Rooms drop-down list, select the breakout room you want to delete.

---

**NOTE:** You must delete the sessions in a breakout room before you can delete the breakout room.

---

- 3** In the Sessions list, delete any sessions in the selected breakout room. To delete the sessions, click the Delete icon.
- 4** In the Sessions list, click Delete.

The breakout room is removed from the Distance Learning application.

## Modifying a Session

You can change some of the properties of the Siebel Distance Learning session if you know the session administrator password or if the session does not use a password. The properties that you *cannot* change are Session Name, Require Registration, and Expected # of Attendees.

In order to modify these properties, you must delete the session and create a new one with the desired properties. The following procedure describes how to modify an existing session listing.

### ***To modify an existing session***

- 1** Navigate to the Session Administration screen.
- 2** In the Sessions list, click the Edit icon for the session you want to modify.

The Modify Session form appears. If required, enter a password at the prompt.

- 3** Type any changes in the appropriate fields, then click Save.

The Sessions list appears. If you made changes in the Time or Description fields, the changes are shown in the list of sessions.

# Attaching a Document to a Session

If you would like attendees for a specific Distance Learning session to be able to download one or more related documents, you can use the following procedure to attach the documents to the session listing.







## To attach a document to a Distance Learning session

- 1 Click the Conference Center screen tab.

The Siebel Distance Learning Sessions - Main Page appears. The Sessions list displays the scheduled sessions.

### Siebel Distance Learning Sessions - Main Page

To join a session, click the session name.

Sessions						
Breakout Rooms : choose one ▾						
Session Name	Start	Description	Attachment	Replay	HTML Viewer	
<a href="#">Getting Started with Distance Learning</a>	02/22/01 04:32 AM	(na)				
<a href="#">Sample Meeting</a>	02/22/01 04:32 AM	(na)				
<a href="#">steve s workshop</a>	04/27/01 10:54 AM	(na)				
<a href="#">test</a>	04/13/01 03:26 PM	(na)				

- 2 In the Sessions list, click the session name hyperlink to which you want to attach a document.

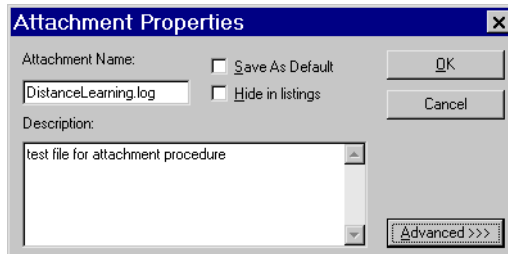
**NOTE:** If you do not have the Siebel Distance Learning client software installed, you will be prompted to install it. For more information, on how to install the client software, see [“Installing the Distance Learning Client” on page 113](#).

The Distance Learning window appears.

- 3 Resize the Distance Learning window so that you have access to the document you want to attach to the session.

- 4 Drag the document from the client operating system directory onto the Distance Learning window.

The Attachment Properties dialog box appears.



The dialog box titled "Attachment Properties" has a close button (X) in the top right corner. It contains the following fields and controls:

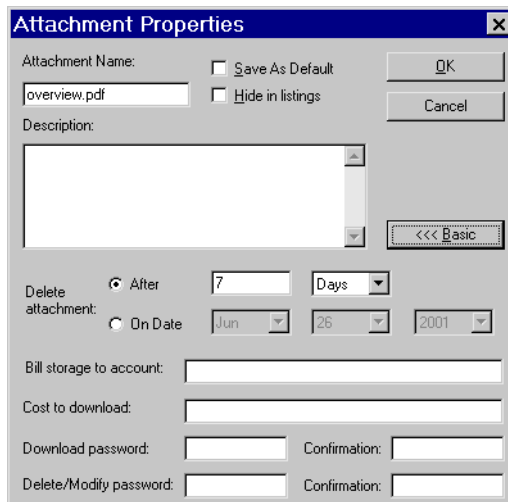
- Attachment Name:** A text box containing "DistanceLearning.log". To its right are two checkboxes: "Save As Default" (unchecked) and "Hide in listings" (unchecked).
- Description:** A text box containing "test file for attachment procedure".
- Buttons:** "OK", "Cancel", and "Advanced >>>" (disabled).

---

**NOTE:** By default, attachments are deleted after 7 days. To change the default date, click Advanced.

---

- 5 To set passwords for downloading and deleting the attachment, click Advanced.



The dialog box titled "Attachment Properties" has a close button (X) in the top right corner. It contains the following fields and controls:

- Attachment Name:** A text box containing "overview.pdf". To its right are two checkboxes: "Save As Default" (unchecked) and "Hide in listings" (unchecked).
- Description:** A text box.
- Buttons:** "OK", "Cancel", and "<<< Basic" (disabled).
- Delete attachment:** Two radio buttons: "After" (selected) and "On Date".
  - After:** A text box containing "7" and a dropdown menu set to "Days".
  - On Date:** Three dropdown menus showing "Jun", "26", and "2001".
- Bill storage to account:** A text box.
- Cost to download:** A text box.
- Download password:** A text box and a "Confirmation:" text box.
- Delete/Modify password:** A text box and a "Confirmation:" text box.

- 6 Click OK to associate the attachment with the session.

**7** Repeat Steps 4 through 6 to attach multiple documents.

**8** Exit the session.

***To download or delete an attachment for the Distance Learning session***

**1** Navigate to the Conference Center.

**2** Find the listing for the session you want to see the attachments for, and then click the Attachment icon.

The Attachment list appears.

**3** Click the download icon for the attachment you wish to download or delete. If you have specified a password, you will be prompted to enter the password.

The Attachment Details form appears.

**4** To download the attachment, click Download.

**5** To delete the attachment, click Delete.

## Deleting a Session

Deleting a session means deleting a file that contains information about the session. The Siebel Distance Learning server reads this information to determine which user groups have been created for the session, which privileges have been assigned to each group, what files have been attached to this session, and so on.

If you do not delete a session, it will continue to be listed in the Sessions list regardless of when it is completed. To automatically delete a session, set the Automatically Delete Session After option to the desired number of hours or days.

### **To delete a session**

- 1** Navigate to the Session Administration screen.
- 2** In the Sessions list, click the Delete icon for the session you want to delete.

---

**NOTE:** The Delete icon is not visible for sessions that are currently in session.

---

- 3** Click OK at the warning prompt.

The session is deleted and no longer appears in the Sessions list.

If a password is required to delete the session, when you click OK at the warning prompt, a separate page appears prompting you for the password. Enter the password and then click OK to return to the Sessions list.



# Siebel Distance Learning Accessories

There are two Siebel Distance Learning accessories that are available to Windows users: Session Moderator and Whiteboard.

Both of these accessories need to be downloaded separately for the Distance Learning client.

## Session Moderator

The Session Moderator provides the capability to monitor the status of the session. Users will need to download the Session Moderator accessory from the Download page. The Download page can be accessed from the Download screen tab on the Siebel Distance Learning home page. Once the Session Moderator accessory is installed, you can select Session Moderator from the Distance Learning View menu. You can monitor the status of the session by selecting the View menu and choosing one of the following options:

- Network bandwidth
- Buffers in use
- Number of users
- Kbytes/sec handled
- Buffers/sec handled
- Frames/sec handled
- Time to Synchronize

The Session Moderator accessory allows administrators to monitor the performance of a session and assist with the overall management of the session. When you want to use the Session Moderator features, perform the following procedure.

### **To use the Session Moderator features**

- 1** Join the session.
- 2** Select View > Session Moderator.

The Session Moderator dialog box appears.

- 3** From the Session Moderator dialog box, select the View option to access the various Session Moderator views that are available (Kbytes/Sec, and so on).

### Whiteboards

Siebel Distance Learning accessories includes a whiteboard accessory that can be downloaded from the Download page. The Whiteboard allows the presenter and attendees who have downloaded the software to share ideas with each other during a Siebel Distance Learning session. The Whiteboard does not save information, so participants will not be able to see anything that was presented using the Whiteboard before they joined the session, only after they joined the session.

The Whiteboard is shared with other users that have the Whiteboard open. Users will see updates that are being made to the Whiteboard in real-time. If you join in the middle of a whiteboarding session, you will only see updates that get made after you have joined.

---

**NOTE:** The Download page can be accessed from the Download screen tab on the Siebel Distance Learning home page.

---

#### ***To use the Whiteboard***

- 1** Join a Siebel Distance Learning session.
- 2** Select View > Whiteboard.

The Whiteboard appears.

# Conducting a Distance Learning Session

# 4

Any instructor or session attendee can change certain settings within Siebel Distance Learning. Some settings determine how network connections are made or what appears on the screen for the person who is adjusting the settings. Other settings determine what information other session attendees or instructors can see about the person who is adjusting the settings. It is particularly important that instructors review these settings before presenting a Distance Learning session, to make sure that accurate and appropriate information will be available to attendees.

## Personalizing Your Presence in the Session

To learn how to personalize your doorbell and icon, see [“Personalizing Your Presence in the Session” on page 124.](#)

## Configuring User Preferences

To learn how to customize key features of Siebel Distance Learning, see [“Configuring User Preferences” on page 122.](#)

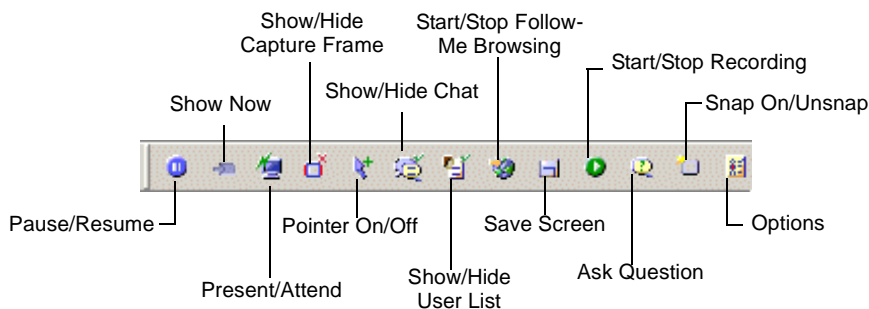
# Using the Siebel Distance Learning Toolbar to Conduct a Session

Siebel Distance Learning allows you to show or hide a toolbar that provides quick access to several useful commands. The following paragraphs describe the buttons on the toolbar, as shown in [Figure 1](#), that are available to a presenter, in their order from left to right.

---

**NOTE:** You can display a ToolTip identifying label for any toolbar icon by clicking the session name to select the toolbar, then positioning your cursor over the icon and holding it still for a few seconds.

---



**Figure 1. Siebel Distance Learning Presenter Toolbar**

**Pause/Resume.** Allows the instructor or other presenter of a Distance Learning session to pause or resume transmission of the visual part of the presentation.

**Show Now.** When the instructor or other presenter has chosen Presentation > Optimize for > Show At Once, a slide is transmitted, but not displayed, to attendees ahead of time. To display the previously transmitted slide to session attendees, click the Show Now button.

**Present/Attend.** Allows a session attendee to become the presenter (if no presenter is currently active) or allows a current presenter to relinquish the presentation role.

**Show/Hide Capture Frame.** Changes the appearance of the Capture Frame and its title bar on the presenter's computer.

**Pointer On/Off.** Changes whether or not session attendees can see the position of the instructor's mouse cursor.

**Show/Hide Chat.** Opens or closes the Online Chat dialog box to allow the instructor or session attendees to send text messages to a selected session participant or to participants.

**Show/Hide User List.** Opens or closes the User List to allow any session participant to see who is attending and who has selected the Raise Hand command.

**Follow-Me Browsing.** Lets the instructor start and stop a Follow-Me Browsing session, in which each attendee's browser will automatically follow the instructor's browser to the Web sites the instructor visits.

**Save Screen.** Lets any session participant save an image of the current Distance Learning screen to a bitmap (.bmp) file.

**Start/Stop Recording.** Lets a presenter start or stop recording a Distance Learning session that can later be replayed.

**Ask Question.** Lets the instructor transmit a quiz question to attendees.

**Snap On/UnSnap.** Lets the instructor determine whether the Capture Frame will be automatically resized to fit whichever application is active on the presenting computer.

**Options.** Allows any Distance Learning session participant to display the Options dialog box, where Personal Info, Preferences, and Firewall Information can be modified.

## Getting Ready to Conduct a Distance Learning Session

When you have finished setting up your presentation environment and are familiar with the Distance Learning toolbar, you are ready to start planning a session. You plan a session by completing the following tasks.

### ***To get ready to conduct a Distance Learning session***

- 1** Decide whether or not you want a private room. If you do, you should set up a breakout room. For more information on how to set up a breakout room, see [“Creating and Maintaining Breakout Rooms” on page 58](#).
- 2** Go to the Session Administration screen and schedule the session. For information on how to schedule a session, see [“Adding a Session” on page 49](#).
- 3** Decide whether you are going to host a standard or custom session. This decision should come from your knowledge of potential session attendees. Standard sessions are where everyone has the same privilege; there is no distinction between instructor and attendee.

You should host a custom session if you want to do any of the following:

- Limit what the attendees can do
  - Give the attendees application sharing or turn on their audio or pointers
  - Share instructor responsibilities
- 4** If you have chosen to set up a custom session, decide whether you want a Group or Multi-level session. To give your assistants some privilege, set up a Multi-level session. To give only the instructors and attendees privileges, use Group to minimize confusion.

---

**NOTE:** You can have multiple people log in as instructor.

---

- 5** Determine your audience's connection speed. It is generally a good idea to use the Optimized transmission mode option. The option is optimized for speed with lower quality. If you want to display pictures, you may want to use the Standard or Full Image Transmission options. It is recommended that you test out to see what quality/speed works for you.

If many of the attendees are on slow networks, it is recommended that you use the Show at Once option. This way everyone gets the image at the same time for a smooth presentation. For more information, on the Show at Once options, see [“Optimizing Your Presentation for Slide Shows” on page 80.](#)

- 6** Decide what kind of audio to use. Set up a telephone conference or use Voice Over IP. Voice Over IP is only recommended for high bandwidth networks.
- 7** Notify your attendees by providing them with a link to the session.

Decide how you want your attendees to join. If it is a one way presentation (presentation over the Web), have them use the HTML Viewer. The HTML Viewer is easier to access for attendees since there is no software to download. You can send out a direct link to the session by creating the link in the following manner:

```
http:// < host name > > /DistanceLrn/ptk-apps/Meetings/cgi-bin/  
java_join.exe/ < < Name of breakout room > > / < Name of Session > >
```

---

**NOTE:** If there is not a breakout room, do not include it in the link. Instead, use a “\_” where it says: < < Name of breakout room > > .

---

- 8** To use application sharing, you need to have attendees download the full client. They can auto-download or download the software in advance. To use the full client, attendees must not be behind a restrictive firewall. It is recommended that you test the connection prior to the session. For more information on firewalls and HTTP Gateway, see [“Providing Support Through Firewalls” on page 44](#).

- 9** Set up your agenda.

Determine if you are going to have quizzes. If yes, you might want to prepare your quizzes in advance.

Determine if you are going to use the Chat option. If yes, you can edit your canned chat messages. To edit or customize your chat messages, go to Start > Programs > Siebel Distance Learning > Client > Edit Chat Message.

Determine if you are going to share documents. If yes, you may want to upload your documents in advance.



## Starting a Distance Learning Session

To start the session, go to the Conference Center, and click on the session name hyperlink. Automatic installation will take place if the client software is not installed on your computer.

---

**NOTE:** If you created a custom session and did *not* set a password for the attendees, you will need to do File > Change Password in order to join the session as the administrator. Type the session administrator password.

---

### ***To adjust your settings***

- Check Options > Advanced - Performance settings.
- Pointer. If you are doing demos you might want to use the Pointer. Make sure to turn your pointer on when you want your pointer to be on. You can customize the pointer, for more information, see [“Using the Siebel Distance Learning Toolbar to Conduct a Session” on page 68](#).
- User List. You might want to check who is in the session.
- Lock Session. Once you have the full audience, you may choose to lock the session so that no one can join in since it may be distracting.

### ***To start presenting***

- Select Presentation > Present. For more information on how to Present, see [“Using the Capture Frame” on page 74](#).

It is a good idea to join the session in advance so that you can present a slide, so that when users join, they can see something. For example, put conference call information on the screen to confirm the number they are supposed to call.

## Using the Capture Frame

The Capture Frame is the transparent window that appears when you are the instructor for a session. This window floats on top of other windows on your display.

When you are presenting material to the session attendees, the Capture Frame controls which images are transmitted to them. Session participants can see everything within the borders of the Capture Frame. You can resize the Capture Frame to include just those areas of the screen that you want to transmit, and you can move it to any location on your screen by dragging it with the mouse.

The color of the Capture Frame serves as a visual indicator during a session. The default color of the frame border is green. By default, the frame border flickers yellow when Distance Learning is transmitting data to attendees, and returns to a steady green when attendees have received the data. The frame border turns red when you select the Pause command to momentarily suspend transmission. The frame border turns blue when you are in application sharing mode.

### **To present information using the Capture Frame**

- 1** Navigate to the Session Administration screen.
- 2** In the Sessions list, click the session name hyperlink that you will use for your training session. Auto installation will take place if the client software is not installed on your computer.

The Distance Learning window appears.

- 3** Choose Presentation > Present.

The Siebel Distance Learning client transmits *everything* inside the Capture Frame to session attendees in real time. This means that everything you do inside the Capture Frame will be visible to the other attendees as you do it unless you go off-air or pause the session.

## Controlling Transmission Content

If you wish to control the information being sent to those attending the session, you can resize the Capture Frame, maximize it, or minimize it. You can also use the mouse to move the Capture Frame around your display.

Another way to control the information you send to attendees is to pause transmission for a few moments while you complete an activity that you do not want attendees to see.

### ***To pause transmission of information during a Distance Learning session***

- 1 Choose Presentation > Pause, or click the Pause button in the Distance Learning toolbar or in the upper left corner of the Capture Frame.



By default, the color of the Capture Frame changes to red to indicate that transmission has been suspended, and the icon on the Pause button changes from two rectangles to a triangle.



While transmission is paused, session attendees continue to see a static display of whatever the Capture Frame contained when you paused transmission.

- 2 When you are ready to resume transmission, choose Presentation > Pause again or click the Pause button.

The Capture Frame returns to its normal transmission color, and the Pause button icon changes back to two rectangles.

## Emphasizing Selected Visual Information

If you want to bring everyone's attention to a certain object in a screen display, you can have the system display the position of your mouse cursor to session attendees.

### ***To make your mouse cursor visible to session attendees***

- 1** Choose Presentation > Pointer On or click the Pointer On button on the toolbar.

When this option is in use, each attendee sees the position of your mouse cursor as an icon. When this option is not in use, your cursor is not visible to session attendees.

---

**NOTE:** On the instructor's computer, the cursor appearance does not change when the Pointer On option is selected. To check the cursor status, from the Presentation menu, note whether or not a check mark is displayed next to Pointer On.

---

- 2** If you want to change the icon that accompanies the mouse cursor, complete the following steps.

- a** Choose Options > Personal Info.

The Personal Info tab of the Options dialog box appears.

- b** Click the Browse button next to the Mouse Pointer field and select a graphic to personalize the mouse cursor that is displayed whenever you make your cursor visible. You can also use your own customized pointer by importing a .bmp file and selecting it.
- c** Click OK.

## Using Video During a Distance Learning Session

Siebel Distance Learning supports the use of live video during a Distance Learning session. However, prerecorded or live video uses extremely high bandwidth and the picture is constantly changing so it is important to capture the presented content as quickly as possible.

**Using video capture mode.** If you are attending a Distance Learning session that uses video, you will need to turn on the video capture mode.

### ***To use video capture mode***

- Choose Presentation > Optimize for > Video (High Bandwidth) in the Distance Learning window.

The Capture Frame is automatically resized to capture small video conferencing windows. The Capture Frame can still be resized, but be aware that large sizes will consume processor time and network bandwidth.

If you are presenting to attendees on slow networks or modems, using video capture mode is not recommended. You can use video mode at a slower capture rate if you do not need fast video.

**Changing the capture rate.** If the presented content is changing quickly, you may want to increase the capture rate. This will make your presentation appear to move more quickly, but will also generate more network traffic. If you do not require frequent updates or if you are limited in processing power, you can also turn the capture rate down.

### ***To change the capture rate***

- 1** Choose Options > Preferences.
- 2** In the General Controls box, adjust the Capture Rate slider to the desired setting.
- 3** Click OK.

The capture rate is now changed to the new setting.

## Providing Audio During a Distance Learning Session

Audio is an important component of Siebel Distance Learning sessions. Unless you have specifically designed a session for visual transmission only, session attendees need to be able to hear your explanations as you present visual material to them. You may also want to be able to hear the voices of session attendees. The following paragraphs describe two ways to provide this capability.

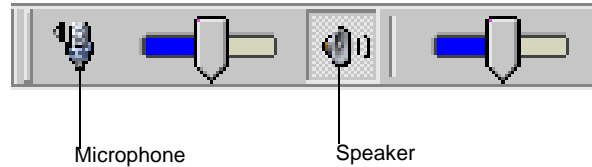
**Telephone conference call.** The recommended method of providing audio during most Siebel Distance Learning sessions is to prearrange a telephone conference call that your session attendees can join. Consult your telephone service provider for information about how to schedule and conduct such a call. You can tell attendees about joining the conference call by placing the necessary information in the session description in the Sessions list for the session or by putting the information on the first screen attendees see when they join the session.

**Voice Over IP.** If session participants (including the instructor) use high-speed network connections to participate in the session, and if participating computers are equipped to send and receive sound, you may find that the built-in Voice Over IP feature of Siebel Distance Learning is adequate for your purposes. When using Voice Over IP, you should always verify ahead of time that it works on your computer.

**To use Voice Over IP sound transmission**

- 1** Choose View > Audio Control.

The Audio Control toolbar appears.



- 2** Click the Microphone icon when you want to transmit audio to other Distance Learning participants.

Your audio streams continuously to the attendees until you click the Microphone icon again. Only one person should be using the microphone at one time.

- 3** Click the Speaker icon when you want to receive audio from other Distance Learning participants.

You receive audio continuously from other Distance Learning participants until you click the Speaker icon again.

## Optimizing Your Presentation for Slide Shows

If attendees connect to a Siebel Distance Learning session through relatively slow network links, Siebel Systems recommends that you design your presentation to consist primarily of static screen displays such as slides. You can optimize this kind of Siebel Distance Learning presentation to begin sending data before you display it to attendees. Distance Learning accomplishes this by sending each screen display to a cache area on the attendees' computers and by displaying the cached screen to attendees only on your command. Attendees see a nearly instantaneous change from one display to the next, instead of seeing a more gradual screen change that reflects slow network performance.

The setting that controls this ability to cache screens is called the Show at Once option, and it can be used for any Distance Learning presentation where you do not need to show real-time motion.

---

**NOTE:** When you are using the Show at Once option, Siebel Systems recommends that you do so in a location where you can see two computers at once—one computer for presenting material to the session attendees, and one computer for joining the session as an attendee—so you can monitor what attendees are seeing.

---

### ***To use the Show at Once option for a presentation***

- 1** Open the applications that you plan to use for your presentation.
- 2** Navigate to the Conference Center screen.

---

**NOTE:** For information on navigating Siebel Distance Learning, see [“Navigating to the Server Administration Screen” on page 32](#).

---

- 3** In the Sessions list, click the session name hyperlink that you will use for your training session.

The Distance Learning window appears.



- 4** Choose Presentation > Present or click the Present button on the Distance Learning toolbar.

The Capture Frame appears. Adjust the position of the toolbar and the size of the Capture Frame as needed.

- 5** If a separate monitoring computer is available, use the Web browser on that computer to navigate to the Conference Center and join the session, as described in [“Getting Started for Attendees” on page 110](#).

The Distance Learning window appears. Verify that it shows your intended presentation.

- 6** On the presenting computer, choose Presentation > Optimize for > Show at Once.

- 7** Use an application of your choice, for example Microsoft PowerPoint, to display the next screen you want attendees to see.

The Capture Frame border blinks and changes color to indicate that the screen is being transmitted to each attendee’s computer. When the Capture Frame stops blinking and returns to its normal color, transmission of the current screen is complete.

Notice that the monitoring “attendee” computer still displays the previous screen. Attendees will not see the screen until you choose Presentation > Show Now or click the equivalent button on the toolbar.

- 8** When you are ready to discuss the next screen of information, choose Presentation > Show Now, click the equivalent button on the toolbar, or click the titlebar of the Capture Frame.

The new screen appears to attendees.

- 9** Repeat [Step 7](#) and [Step 8](#) for each screen you want to display to session attendees.

## Viewing Attendee Information During a Session

During a Distance Learning session, you can see the following kinds of information about attendees in the User List dialog box:

- Who is attending the session
- Attendees who are requesting your attention
- Results of the most recent quiz question

However, when you are presenting a Siebel Distance Learning session, attendees may find it confusing to see the User List as part of what is transmitted from your computer. To address this issue, Distance Learning offers you the following options:

- **Pause transmission while viewing attendee information.** By default, Distance Learning pauses transmission from the Capture Frame while you view the User List. When you close the User List dialog box transmission automatically resumes.
- **Display User List to attendees.** When the Display User List to Attendees check box is selected, Distance Learning transmits the User List to attendees if you view it inside the Capture Frame on the presenting computer.

**To view information about attendees during a Distance Learning session**

- 1 Choose View > User List or click the User List button on the Distance Learning toolbar.

The User List dialog box appears.



Normally, attendees' names are displayed in the User List as black text. However, if an attendee has selected Raise Hand to request your attention, the student's name is displayed in red, along with the time when the attendee selected Raise Hand. If an attendee has granted application sharing, the attendee's name is displayed in blue. For information on application sharing, see ["Application Sharing" on page 100](#).

- 2 Choose one of the following methods to coordinate the display of the User List with transmission of Capture Frame contents:
  - If you want to continue transmitting Capture Frame contents to students while the User List dialog box is open, click to select the Display User List To Attendees check box.
  - If you want to pause transmission from the Capture Frame while you view the User List, make sure the Display User List to Attendees check box is *not* selected, which is the default setting. When you are ready to resume transmission, click Close in the User List dialog box.

- If you want to drill down into a user in the session, in the User List dialog box, double-click the name of the user. The Personal Info dialog box appears with the detailed information about the user. From here you can choose to send private text messages, send email messages, and so on. If you are in a Group or Multi-Level session, you can make the following actions on the user: Turn Point On, Turn Audio On, Make Presenter, and so on.

From the User List dialog box, you can use the following features.

Feature	Description
Chat	Click the Chat button to send a private text message to the attendee.
Send	Click the Send button to email the highlighted attendee.
Surf	Click the Surf button to browse the Web pages that the highlighted attendee has specified in the user's Personal Information. If this information is not available, the Surf button will be grayed out.
Save to Disk	Click the Save to Disk button to save the highlighted attendee's information to your local hard drive.
Turn Pointer On/Off	Click the Turn Pointer On button to turn the attendee's pointer on. To turn the pointer off, click the Turn Pointer Off button.
Turn Audio On/Off	Click the Turn Audio On button to turn the attendee's audio on and to bring up the audio control to the user's toolbar. To turn the audio off, click the Turn Audio Off button.
Make Presenter/Attendee	Click the Make Presenter button to make an attendee the new presenter. The Make Attendee button will take the presenter privilege away from the user, if the user is currently presenting.
Eject from session	Click the Eject from session button to eject an attendee from the session. A pop-up window will appear on your desktop asking you to confirm that you want to eject the attendee. Click Yes and the user will be disconnected from the session. The attendee will also no longer be able to join the session.

## Using Chat Sessions While Conducting a Distance Learning Session

Siebel Distance Learning includes a chat feature that you can use to exchange brief text messages with a selected session participant or with everyone who is participating in the session. You can use these messages to do the following:

- Solicit questions or answers from students in an online classroom
- Hold private or group conversations during a session
- Exchange text, such as SQL strings and program commands, which can be cut and pasted into other programs
- Converse with users who have access to only a single phone line, and who are using that line for a modem connection

When you are presenting a Siebel Distance Learning session, attendees may find it confusing to see a chat dialog box as part of what is transmitted from your computer, because the transmitted chat dialog box looks very similar to their local chat dialog boxes. To address this issue, Distance Learning offers you the following options:

- **Pause transmission while using the Online Chat dialog box.** By default, if you are presenting, Distance Learning pauses transmission from the Capture Frame when you open the Online Chat dialog box. When you close the Online Chat dialog box, transmission automatically resumes.
- **Display Online Chat dialog box to attendees.** At your request, Distance Learning allows the Online Chat dialog box to be transmitted to attendees as part of the display inside the Capture Frame on the presenting computer.

The following procedure describes how to use the chat dialog box.

#### **To exchange text messages during a session using the chat dialog box**

- 1 From the Distance Learning menu, choose View > Chat or click the Chat icon on the Distance Learning toolbar or double-click a user name in the User List to display that user's Personal Info settings, then click Chat.

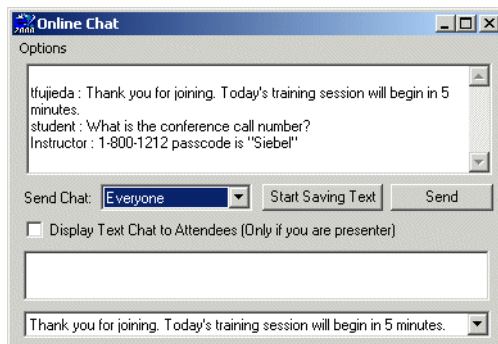
The Online Chat dialog box appears.

- 2 Select a value from the Send Chat drop-down list.

You can select one session participant to chat with or you can select Everyone to send your message to all session participants.

- 3 Type your chat message in the text field at the bottom of the chat dialog box, and then click Send to transmit it to your intended recipient or recipients.

The text of your message appears in the upper area of your chat dialog box, labelled with your user name. If you have designated only one recipient, the label also includes the user name of the recipient and indicates that the message was private.



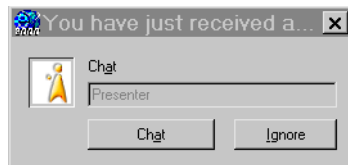
- 4** If you want to save a text record of your chat exchange, click Start Saving Text.

The Save As dialog box appears. Designate a file to contain the text of the chat and click OK.

In the chat dialog box, the Start Saving Text button is replaced by a Stop Saving Text button that you can click at any time to stop saving chat text. Text is saved only if it is sent or received when Start Saving Text is active. Any text sent or received when Start Saving Text is not active will not be saved, even if it is visible on the screen when you click Start Saving Text.

If your recipients have their chat dialog boxes open, your message appears in the upper area of each of their chat dialog boxes, as well as the upper area of your chat dialog box.

Depending on their personal preferences settings, if your recipients do not have their chat dialog box open, each of their screens may briefly display a small Incoming Chat dialog box that indicates you are trying to chat with them. They can click Chat to open their chat dialog boxes and start chatting with you, or they can click Ignore to close the dialog box without replying.



---

**NOTE:** In a custom session, the administrator may limit the attendees' access to chat.

---

---

**NOTE:** History of the chat sessions are saved on the server automatically as an Attachment for the session. In order to delete this file, you need to enter a password, Admin.

---

## Asking Attendees Quiz Questions During a Session

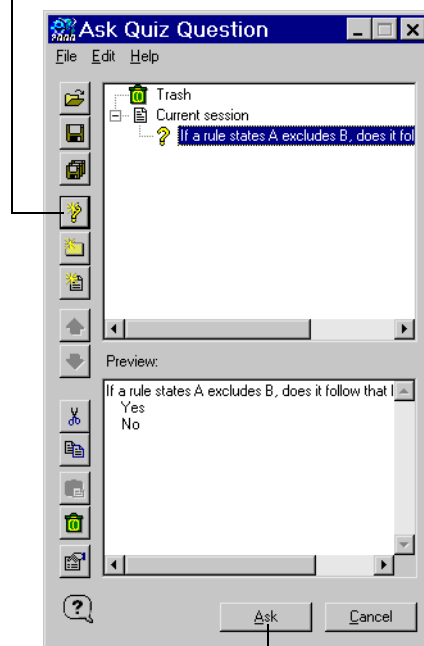
During a Siebel Distance Learning session, you can transmit one or more quiz questions to session attendees as a group. These quiz questions can either be impromptu or prepared in advance. For information about how attendees respond to quiz questions, see [“Responding to Instructor Questions During a Session” on page 128](#).

### **To give an impromptu quiz to session attendees**

- 1 Choose Quiz > Ask Question.

The Ask Quiz Question dialog box appears.

New Question icon

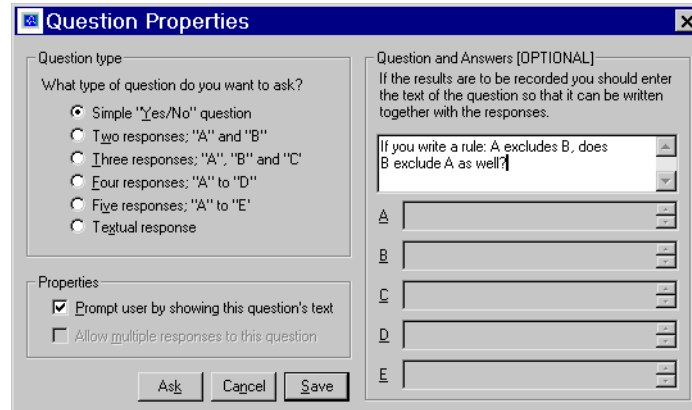


Ask Question button



**2** Click the New Question icon.

The Question Properties dialog box appears.

The image shows a 'Question Properties' dialog box with a blue title bar. It is divided into two main sections. The left section, titled 'Question type', contains a group box 'What type of question do you want to ask?' with six radio button options: 'Simple "Yes/No" question' (selected), 'Two responses; "A" and "B"', 'Three responses; "A", "B" and "C"', 'Four responses; "A" to "D"', 'Five responses; "A" to "E"', and 'Textual response'. Below this is another group box 'Properties' with two checkboxes: 'Prompt user by showing this question's text' (checked) and 'Allow multiple responses to this question' (unchecked). The right section, titled 'Question and Answers [OPTIONAL]', contains a text area with the instruction 'If the results are to be recorded you should enter the text of the question so that it can be written together with the responses.' and a sample text 'If you write a rule: A excludes B, does B exclude A as well?'. Below the text area are five input fields labeled A, B, C, D, and E, each with a small 'x' icon to its right. At the bottom of the dialog are three buttons: 'Ask', 'Cancel', and 'Save'.**3** Enter the question text and select the question type.

For example, you can ask simple yes/no questions, create multiple-choice questions, or ask questions that require a text response. For more information, see [“To prepare quiz questions ahead of time” on page 90](#).

**4** Click Ask.

The question is transmitted to attendees right away provided that the Prompt user by showing this question's text check box is selected. If the check box is not selected, you must ask your question aloud because the attendees will not see the question text.

- 5 After you have waited a suitable interval for attendees to respond to the question, choose Quiz > View Quiz Results.

The Quiz Results dialog box appears. By default, transmission to attendees is paused while you view this dialog box, and it resumes when you click Close. If you want transmission to continue while you view the results, allowing the attendees to see those results also, select the Display Quiz Results To Attendees check box.

If you want to view quiz answers as percentages, rather than totals, select the Show Results As Percentage check box.

If you want to see how each attendee answered the quiz question, choose View > User List. One of the following icons is displayed to the left of each user name:

- **Check mark.** Indicates a Yes answer.
- **X.** Indicates a No answer.
- **A, B, C, D, or E.** Indicates the multiple choice option chosen by the user.
- **Document icon.** Indicates text response.

When you have finished viewing quiz results for the most recent question, click Close.

- 6 To ask another quiz question and view attendee answers, repeat Step 1 through Step 5 of this procedure.

#### ***To prepare quiz questions ahead of time***

- 1 Use one of the following methods to display the Ask Quiz Question dialog box:

- **Before joining a session:** Choose Start > Programs > Siebel Distance Learning > Client > Edit Quiz Questions.
- **While presenting a session:** Choose Quiz > Ask Question.

The Ask Quiz Question dialog box appears.

- 2 Specify the file that will store the quiz questions you create.

- **To create a new file:** Click the New File icon in the Ask Quiz Question dialog box.
- **To specify an existing file:** Click the file listing in the top window of the Ask Quiz Question dialog box.

- 3 If you want to create a subsidiary organizing folder within the selected file, click the New Folder icon.

A new folder appears in the top window of the Ask Quiz Question dialog box, positioned below and to the right of the parent file.

- 4 To add a question to the selected file or folder, click the New Question icon.

The Question Properties dialog box appears.

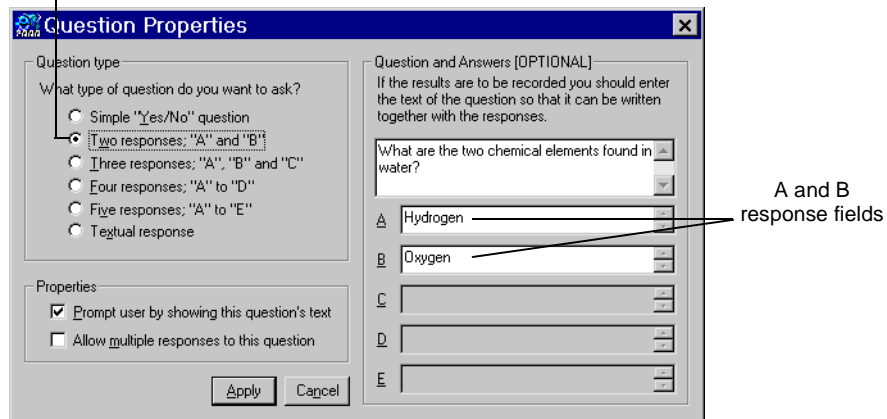
- 5 Click the appropriate button in the Question Type frame to indicate whether you are creating a Yes/No question, a multiple-choice question, or a question that requires a textual response.
- 6 Enter the text of the question in the upper field of the Questions and Answers frame.
- 7 If you chose a multiple-choice question type, you must specify whether the attendee can choose more than one response to the question.
  - **To allow only one response to the question:** Uncheck the Properties check box Allow multiple responses to this question.
  - **To allow multiple responses to the question:** In the Properties field, select the Allow multiple responses to this question check box.

## Conducting a Distance Learning Session

### Asking Attendees Quiz Questions During a Session

- 8** If you chose a multiple-choice question type, you may also specify possible responses to the question by entering them in the appropriate fields. For example, if you chose a Two responses; “A” and “B” Question type, you may enter possible answers in the A and B response fields of the Question Properties dialog box.

Two responses; “A” and “B”



- 9** Use one of the following methods to save your question:
- If you are creating the question while in a session, click Save.
  - If you are creating the question before a session, click Apply.

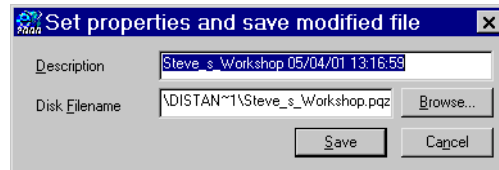
The Question Properties dialog box closes. The text of the question is displayed in the top window of the Prepare Quiz Questions dialog box. The lower window of the dialog box displays a preview of how the question and any preconfigured answers will appear to session attendees. You can later ask each question by clicking Ask in the Ask Quiz Question dialog box.

- 10** To specify additional questions for the selected file or folder, repeat Step 4 through Step 9 of this procedure.
- 11** To change the position of a question within the file, select the question and click the up or down arrow icons in the Prepare Quiz Questions dialog box.

- 12** When you are finished preparing the quiz, click Exit to close the Prepare Quiz Questions dialog box.

The Save Quiz Question File dialog box appears.

- 13** Click Yes to display the Set Properties and Save Modified File dialog box.



- 14** If you want this file of quiz questions to be accessible to instructors who use other computers, enter an address in the Disk Filename field that will be accessible to the applicable instructors. Otherwise, you can use the default local address or specify another local address. Then click Save.

## Using Follow-Me Browsing

While you are presenting a Siebel Distance Learning session, you may want to display a series of Web pages to session attendees. To accomplish this, you can start a Follow-Me Browsing session, and then simply navigate to the desired Web pages using your own browser. Each attendee's browser will follow your browser automatically to each Web page you select on the presenting machine. This continues until you exit from Follow-Me Browsing mode.

### **To use Follow-Me Browsing**

- 1** Choose View > Start Follow-Me Browsing on the presenting computer.

If you have no Web browser window currently open, the Follow-Me session automatically opens the default browser.

If you have a Web browser window currently open, the Follow-Me session uses the open instance of the browser.

On each attendee's computer, the attendee's local browser automatically begins to follow the presenting computer to each Web site that you show in the presenting browser instance.

- 2** On the presenting computer, use regular browser commands and mouse clicks to navigate to each of the Web pages you want to display to session attendees.
- 3** When you no longer need to display Web pages to the attendees, choose View > Stop Follow-Me Browsing.

## Sharing Presentation Responsibilities

In the course of presenting a Siebel Distance Learning session, you may occasionally want to let one of the attendees demonstrate an operation to other session participants, or you may want to let attendees present information to each other during specific time periods, or after the end of a session. The following procedures describe how to relinquish the role of presenter to a specific attendee, and how to offer the role of presenter to any attendee.

---

**NOTE:** Once you relinquish the role of presenter, control of the presentation passes to the next presenter. If you want to resume presenting later in the session, the current presenter can voluntarily transfer control of the presentation so you can start presenting again.

---

### ***To let a specific attendee present information to other session participants***

- 1** Ask the attendee who wants to present to choose Presentation > Raise Hand.

If the attendee has already chosen Raise Hand, have the attendee choose Presentation > Lower Hand, then choose Presentation > Raise Hand again.

On the computer that is currently presenting, the Request for Attention dialog box appears to notify you that an attendee has chosen Raise Hand.

- 2** Click Let Them Present.

The presentation role is transferred to the attendee whose Raise Hand command caused the dialog box to be displayed. The Capture Frame disappears from the screen of the previously presenting computer and appears on the screen of the new presenting computer. Attendees, including the previous presenter, see whatever is displayed inside the Capture Frame on the new presenting computer.

### ***To let any attendee present information to other session participants***

- On the presenting computer, choose Presentation > Attend.

The Capture Frame disappears from the screen of the computer that has been presenting. A dialog box appears on the computer screen of each attendee who has requested Raise Hand, indicating that the previous presenter has yielded the presenting role, and asking if the attendee wants to try to present. The first attendee to click Yes or to choose Presentation > Present becomes the new presenter.

## Recording a Siebel Distance Learning Session

Siebel Distance Learning lets the instructor for any Distance Learning session record the session as it occurs. Although this capability can be used during a regular Distance Learning session, it is primarily designed to let an instructor record a visual presentation and his or her own voice in a synchronized audio track when no session attendees are present. When the instructor stops recording, the recorded presentation is immediately available for playback through the Web.

---

**NOTE:** To avoid unintentionally displaying the recording to the public before you are ready, use a session that requires attendees to enter a password before they can join the session. The password for the session applies when playing back the session. You will need to download the client to view the session.

---

A person who replays a recorded Distance Learning presentation *can not* use the following interactive capabilities:

- Responding to instructor quiz questions
- Chatting with other viewers, session attendees, or instructor
- Using the Raise Hand command
- Seeing information about other viewers

Since the use of these interactive tools is likely to prove confusing to users who replay recorded sessions, Siebel Systems recommends that you avoid using these capabilities when recording any presentations.

---

**NOTE:** The recording capability in Siebel Distance Learning is not intended to replace products that are explicitly designed for creating multimedia presentations.

---

In Distance Learning, you can record a visual presentation without an audio track, or you can record audio at the same time as you record a visual presentation. You can not use Distance Learning to record audio alone or to combine a Distance Learning visual presentation with audio recorded by another means. You can not edit or manipulate recorded sessions.

If you want to include an audio track when you are recording a Distance Learning session, your computer must be equipped with a microphone.



**To record a Distance Learning session**

- 1** Open the applications that you plan to use in your recorded presentation.
- 2** Navigate to the Conference Center screen.
- 3** In the Sessions list, click the session name hyperlink that you will use for your training session.

The Distance Learning window appears. If no suitable session exists, add a new session, as described in [“Adding a Session” on page 49](#).

- 4** Choose Presentation > Present.

The Capture Frame appears. Adjust the size of the Capture Frame as needed, and then display the first image or application you want to show in your recorded session. When the Capture Frame stops flickering, click the Pause button to stop transmitting.

- 5** If you want the pointer to be displayed in your presentation, verify that Presentation > Pointer On is selected.
- 6** If you want to include sound with your recording, choose View > Audio Control.

The Audio Control toolbar appears.

- 7** Click the Microphone icon to use continuous audio recording.

---

**NOTE:** Siebel Systems recommends testing to determine the optimal position of the microphone before recording a Distance Learning session.

---

- 8** Click the Pause button to resume transmitting, then choose Presentation > Record > Start Recording to start recording.

The word Recording appears in the Distance Learning title bar, in parentheses.

- 9** Begin your presentation. If you are using audio, speak clearly into the microphone you are using to record the audio. Describe and explain the actions you are recording as you give your visual presentation.

- 10** When your presentation is finished, choose Presentation > Record > Stop Recording, then choose File > Exit.

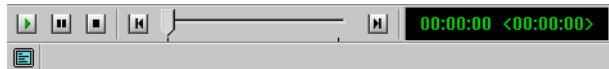
When you finish recording a Distance Learning session, you may want to replay it before announcing its availability and communicating any necessary password to viewers.

#### **To replay a recorded Distance Learning session**

- 1** Navigate to the Conference Center screen.
- 2** Find the listing for the session you want to replay, and then click the Replay icon.  
The Replay icon looks like a movie projector.



The Distance Learning - Attending window appears with the Replay toolbar.



- 3** Click the Play button on the Replay toolbar.

The visual presentation plays along with its audio track. You can use the buttons on the Replay toolbar to rewind, fast-forward, stop, or start the recorded presentation.

## Ejecting and Locking Out a Participant

While you are conducting a custom Distance Learning session, you may occasionally find that one of the participants disrupts the learning experiences of other participants. The following procedure describes how to eject such a participant from a custom Distance Learning session.

---

**NOTE:** If you want to permanently lock out a disruptive participant or a range of IP addresses such as the address of a business competitor, see [“Locking Out Selected Addresses and Domains” on page 36](#).

---

---

**NOTE:** The Eject users option is only available in custom sessions.

---

### ***To eject a participant from a custom Distance Learning session***

- 1** Select View > User List.

The User List dialog box appears.

- 2** Double-click the name of the participant you want to eject from the session.

The selected participant’s Personal Info dialog box appears.

- 3** Click Eject from Session.

A message dialog box appears and prompts you to confirm that you want to eject the attendee.

- 4** Click Yes.

The selected participant is disconnected from the session. The participant will also not be able to rejoin this session.

## Application Sharing

Application sharing is the capability of presenters and attendees to share their desktops during a session. This capability is useful for both presenters and attendees. Application sharing can be used in the following situations:

- To let attendees familiarize themselves with a product without having to install the product software on their computers.
- Presenters can demonstrate a particular feature and have the attendees walk through the process on the spot.
- Presenters can help attendees during a session.
- Attendees can use application sharing to illustrate their understanding of presented material.

### ***To use application sharing***

- Have the attendee, choose Presentation > Request Application Sharing.

The Request Application Sharing dialog box appears on the presenter's desktop. The presenter has two options:

- The attendee can now control the presenter's screen. The attendee's pointer and the presenter's Capture Frame both turn blue when in application sharing mode.
- The attendee is notified that the request is denied.

### ***To terminate application sharing***

- Choose Presentation > Disallow Application Sharing.

---

**NOTE:** For Group and Multi-level sessions, the presenter can actively grant application sharing to a user by drilling down on the user's name in the User List dialog box, and by clicking the Grant Application Sharing button. Similarly, the presenter can disallow application sharing by selecting the Disallow Application Sharing button.

---

This chapter provides an overview of some of the errors you may see while using Siebel Distance Learning and the steps you can take to resolve the problems.

## Technical Support Information

The About dialog box provides valuable information about various properties of the session to which you are connected when you are reporting problems to your system administrator or technical support personnel.

The following information is displayed in the About dialog box:

- The version number of the client you are using.
- The location and version number of the server to which you are attached.
- The location of the HTTP Gateway Server provided for your session.
- A record of how long you have been connected to the session.
- The amount of data your computer has sent and received since the beginning of the session.
- The overall data transmission rate since the beginning of your session, and the transmission rate for the most recently sent or received data.
- Data describing how well incoming and outbound data streams compress.

While this information is provided primarily for technical support personnel use, you can use it to help improve the quality of your Distance Learning presentations.

For example, the compression statistics can be used to measure how well the material you are transmitting can be compressed. This can be used, for instance, to measure the effect of changing the background on your slide presentations from a multicolored or graded scheme to a plain scheme.

## Common Problems and Their Solutions

This section provides a list of common error messages and the steps you can take to resolve them.

### Error When Downloading the Client

If Auto Install is not working, you need to download the client manually. For more information on how to install the client manually, see [“Downloading Client Software Manually” on page 116](#).

If you are continually prompted to update your client even though you know you have the latest version, click Cancel and try to join again. If this does not work, close your Web browser and reopen.

### You Are Prompted for a Password

If you try to join a session that has been protected with a password, you are prompted to enter a value before you are allowed to enter the session. In addition, the actions that you can perform after joining a session may be controlled by the value that you enter. Contact the presenting organization for the password you need.

### Actions Fail with the Error “Action Denied”

Once you have joined a session, you are assigned a user group, with associated capabilities and privileges, according to the password you entered while joining. If you entered the session at a low privilege level, you may find that some attempted operations during the session are not allowed. You can change your password to one with more privileges at any time.

#### ***To enter a new password***

- Choose File > Change Password.

## **Web Server Installation Error**

These instructions assume that you installed Siebel Distance Learning in the C:\DistanceLrn directory.

### **General Instructions**

You can use these instructions if you are installing a Web server and receive the error message “The install program was unable to configure your Web server automatically.”

In order for Siebel Distance Learning to work properly, you must configure your Web server and add the following directory mappings:

- a** Map /DistanceLrn to C:\DistanceLrn\PictureTalk (as Read-Only)
- b** Map /DistanceLrn/PictureTalk/ptk-apps/meetings/cgi-bin to C:\DistanceLrn\PictureTalk\ptk-apps\meetings\cgi-bin (as Read and Execute)

The following sections provide more detailed instructions for some servers.

### **Instructions for Microsoft IIS4**

If you are running Microsoft IIS 4.0, you can configure your Web server by completing the following steps.

#### ***To configure your Web server running Microsoft IIS 4.0***

- 1** Run the Microsoft Management Console.  
Choose Start > Programs > Windows NT 4.0 Option Pack > Microsoft Internet Information Server > Internet Service Manager.
- 2** Map the virtual directory for DistanceLrn.
  - a** Right-click on Default Web site for the computer where Siebel Distance Learning is installed.
  - b** Select New - Virtual Directory.
  - c** Enter DistanceLrn as the Alias name.
  - d** Click Next.

- e** Enter C:\DistanceLrn\PictureTalk as the physical path, and click Next.
  - f** Check the Allow Read Access option only. Otherwise, downloading the client may fail.
  - g** Click Finish.
- 3** Configure the DistanceLrn/ptk-apps/meetings/cgi-bin directory.
  - a** Expand the DistanceLrn virtual directory (created in the previous step) by clicking on the + symbol.
  - b** Expand the ptk-apps directory under the DistanceLrn directory.
  - c** Expand the meetings directory under the ptk-apps directory.
  - d** Right-click on the cgi-bin directory.
  - e** Select Properties from the popup menu.
  - f** Enable the Execute (include scripts) option (under Permissions).
  - g** Click OK.



## **Instructions for Netscape Enterprise Server**

If you are running Netscape Enterprise Server (4.0 + ), you can configure your server by completing the following the steps.

### **To configure the Web server running Netscape Enterprise Server**

- 1** Connect to the Netscape Administration server.
  - a** Use your browser to navigate to the Netscape Administration server (for example, `http://myhost:8080`, assuming that your Web server host is myhost, and you have specified the administration server port to be 8080).
  - b** When the Netscape Server Administration screen comes up, click on the button that has the name of your Web server host (for example, myhost).
- 2** Map the virtual directory DistanceLrn.
  - a** Click on the Content Management button near the top of the screen.
  - b** Click on the Additional Document Directories link on the left pane.
  - c** On the right pane, enter DistanceLrn for the URL prefix field.
  - d** Enter `C:\DistanceLrn\PictureTalk` for the Map to Directory field.
  - e** Click the OK button, and then the Save and Apply button on the next screen.
- 3** Configure the DistanceLrn/ptk-apps/meetings/cgi-bin directory.
  - a** Click the Programs button near the top of the screen.
  - b** On the right panel, enter DistanceLrn/ptk-apps/meetings/cgi-bin for the URL prefix field.
  - c** Enter `C:\DistanceLrn\PictureTalk\ptk-apps\meetings\cgi-bin` for the CGI directory field.
  - d** Click the OK button, and then the Save and Apply button on the next screen.

For more information about configuring your Web server, see *Siebel Server Administration Guide*.

## Network Errors

Since Siebel Distance Learning is a network-based application, its success depends on the availability and stability of your network and the speed and reliability of your Internet connection. If you are having difficulty with your network, the Siebel Distance Learning Server tries to help you diagnose the problem by displaying an error dialog box.

### Connection Errors Due to Firewall Restrictions

If you receive an error message indicating that your Distance Learning client software cannot connect to a Distance Learning session, your network may be using a firewall that blocks normal Siebel Distance Learning transmissions. If so, you may be able to use either an HTTP Gateway connection or an HTML Viewer connection to participate in the session.

An HTTP Gateway connection is available if the organization that is presenting the Distance Learning session is running an HTTP Gateway server. Such a connection provides full functionality during the Distance Learning session, but performance may be slower than a regular Distance Learning TCP/IP socket connection would provide. For information about using an HTTP Gateway, see [“To configure an HTTP Gateway” on page 45](#).

---

**NOTE:** If you plan to have attendees use the HTML Viewer, you should install the HTTP Gateway on the Siebel Distance Learning server.

---

If the Distance Learning server is configured to provide HTTP functionality, and if it is not possible to access the session using Distance Learning client software, a prospective session attendee who is located behind a firewall can click the HTML Viewer icon on the Conference Center screen to use an HTML Viewer connection. Attendees who use an HTML Viewer connection can hear the audio portion of the session through a standard telephone conference call, but they *can not* use the following capabilities of Siebel Distance Learning:

- Present
- Participate in Application Sharing

- Standard Chat Lines or Private Chat (users can receive messages and send messages to everyone)
- Ask Quiz Questions
- Record sessions
- Conduct Follow-Me Browsing (users can follow)
- Hear audio portion of sessions via Voice Over IP
- View detailed information about other session attendees
- Use the Raise Hand option to notify the instructor that you have a question

For information about using an HTML Viewer, see [“To use the HTML Viewer” on page 111](#).



This chapter provides an overview of how to attend or access a distance learning session.

## Navigating Siebel Distance Learning Attendee Screens

The attendee screen allows you to access and join Distance Learning sessions. The following procedure describes how to get to the attendee screen.

### ***To navigate to the attendee screen from a URL***

- 1 Start your Web browser and enter the URL for your Siebel Distance Learning home page.

The Siebel Distance Learning home page appears.

- 2 Click the appropriate screen tab:
  - If you want to view or join a session, click the Conference Center screen tab.
  - If you want to manually download client software, click the Download screen tab.

The main page of the selected screen appears.

### ***To navigate from within the Siebel application***

- 1 From the Site Map, select Distance Learning.
- 2 Click the Distance Learning Home or View Available Sessions hyperlink.

# Getting Started for Attendees

When a Web or intranet user first views a Siebel Distance Learning Web site, a standard Web browser is all that the user needs to gather information about available Distance Learning sessions. When the user is ready to join a Distance Learning session, Distance Learning client software is required. However, if the Distance Learning server is configured with the HTTP Gateway, and if it is not possible to access the session with the client software (for example, if the user is located behind a firewall), users can view the session through an HTML Viewer connection. This way users can join the session without installing the Distance Learning client software. The HTML Viewer connection allows users to participate in the session through a browser window, rather than the Distance Learning client window. Users can hear the audio portion of the session via a standard telephone conference call and use limited chat capabilities. However, there are limitations when using an HTML Viewer connection. The following capabilities are not available when using an HTML Viewer:

- Present
- Participate in Application Sharing
- Standard Chat Lines or Private Chat (users can receive messages and send messages to everyone)
- Ask Quiz Questions (users can answer)
- Record sessions
- Conduct Follow-Me Browsing (users can follow)
- Hear audio portion of sessions via Voice Over IP
- View detailed information about other session attendees
- User the Raise Hand option to notify the instructor when you have a question

Attendees should follow the instructions given by the training administrators as to whether they should use the Siebel Distance Learning client or the HTML Viewer.

### To use the HTML Viewer








- 1 Navigate to the Conference Center screen.

**NOTE:** For information on navigating in Siebel Distance Learning, see [“Navigating Siebel Distance Learning Attendee Screens” on page 109.](#)

The Siebel Distance Learning Sessions - Main Page appears.

#### Siebel Distance Learning Sessions - Main Page

To join a session, click the session name.

Sessions						
Breakout Rooms : choose one ▾						
	Session Name	Start	Description	Attachment	Replay	HTML Viewer
	<a href="#">Getting Started with Distance Learning</a>	02/22/01 04:32 AM	(na)			
	<a href="#">Sample Meeting</a>	02/22/01 04:32 AM	(na)			
	<a href="#">steve s workshop</a>	04/27/01 10:54 AM	(na)			
	<a href="#">test</a>	04/13/01 03:26 PM	(na)			

- 2 In the Sessions list, find the listing for the session you want to attend but *do not click the session name*. Instead, click the HTML Viewer icon.

The HTML Viewer Login Page appears.

- 3 Enter your User Name and if required, a password. Optionally, you can enter your email address and phone number.
- 4 Click Join.

A Distance Learning presentation image appears in the browser.

#### **To use the Siebel Distance Learning client**

- 1 Download the client.

---

**NOTE:** For information on downloading the client, see [“Installing the Distance Learning Client” on page 113](#).

---

- 2 Navigate to the Conference Center screen.

---

**NOTE:** For information on navigating in Siebel Distance Learning, see [“Navigating Siebel Distance Learning Attendee Screens” on page 109](#).

---

The Siebel Distance Learning Sessions - Main Page appears.

- 3 Click the name of a Distance Learning session that you want to attend.

If the session requires no password for attendees, the Attendee view of the session appears, along with the Siebel Distance Learning toolbar.

If the creator of the session has assigned a cypherlock (a password) to the session, a small padlock icon appears next to the session name. When you click the session name, a dialog box appears, prompting you for a password. Type the password for the session and then click OK. The Attendee view of the session will then appear, along with the Siebel Distance Learning toolbar.

---

**NOTE:** A custom session may have several different passwords assigned to it, each associated with a different set of privileges for session attendees. One of these passwords may be null, allowing you to join the session with a certain set of privileges simply by clicking OK at the password prompt. If necessary, consult your Distance Learning instructor to determine whether a password is needed.

---



# Installing the Distance Learning Client

There are two ways to obtain Distance Learning client software:

- Automatically download software to a Windows computer by joining a Distance Learning session.

If your Windows computer does not already contain Distance Learning software, the most recent version of the software is automatically placed on your computer when you attempt to join a Distance Learning session for the first time.

- Manually download software from the Distance Learning Web site. You will want to manually download the client software if you want to do the following:
  - Download the client before joining a session.
  - Download the Distance Learning accessories, such as a Whiteboard or Session Moderator as described in [“Siebel Distance Learning Accessories” on page 65](#).

---

**NOTE:** If you are using a dial-up link (and a 28,800 baud modem) to connect to the network, manually downloading the client may take several minutes.

---

The following sections describe the relative advantages of each downloading method.

## System Requirements

Supported Operating Systems	<ul style="list-style-type: none"> <li>■ Windows 95/98/2000/Millennium Edition (ME).</li> <li>■ Windows NT 4.0.</li> </ul>
Processor Speed	<ul style="list-style-type: none"> <li>■ 300 MHz or faster.</li> </ul>
Memory	<ul style="list-style-type: none"> <li>■ 16 MB of free memory; more memory is required when large screens are presented.</li> </ul>
Audio	<ul style="list-style-type: none"> <li>■ Any full duplex sound card and microphone (only required if using Distance Learning Voice Over IP audio) For more information, see <a href="#">“Using Audio During a Distance Learning Session” on page 119</a>.</li> </ul>
Network	<ul style="list-style-type: none"> <li>■ Any TCP/IP network; performance will depend on available bandwidth.</li> </ul>

## Downloading Client Software Automatically

When a user with a Windows computer first clicks a link to join a Siebel Distance Learning session, the server determines whether or not the user needs to download client software and automatically performs the download if it is needed. Depending on the speed of the network connection between the server and client machine, the download operation may take a few moments.

### **To download client software automatically**

- 1 Navigate to the Conference Center screen.

---

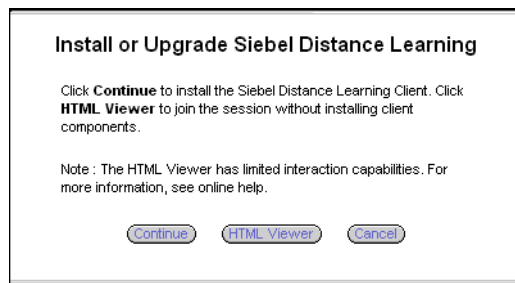
**NOTE:** For information on navigating Siebel Distance Learning Web sites, see [“Navigating Siebel Distance Learning Attendee Screens” on page 109](#).

---

The Siebel Distance Learning Sessions - Main page appears.

- 2 Click the name of the session or breakout room you want to join.

If Distance Learning client software has not previously been installed on your computer, and if your computer uses a Windows operating system, the Install or Upgrade Siebel Distance Learning dialog box appears.



- 3** Click Continue.
- 4** At the dialog box prompt, click Yes.

The Distance Learning client software is downloaded to your computer. When the automatic download operation is complete, you will need to enter personal information for the session user list. You will then join the Distance Learning session you chose.

---

**NOTE:** The automatic download operation will only work if the security settings for the browser are set appropriately. If automatic installation does not work, download the client manually.

---

## Downloading Client Software Manually

In some cases, you will want to manually download the Distance Learning client software. You can do this by accessing the Download page from the Siebel Distance Learning Home page.

### To download client software manually

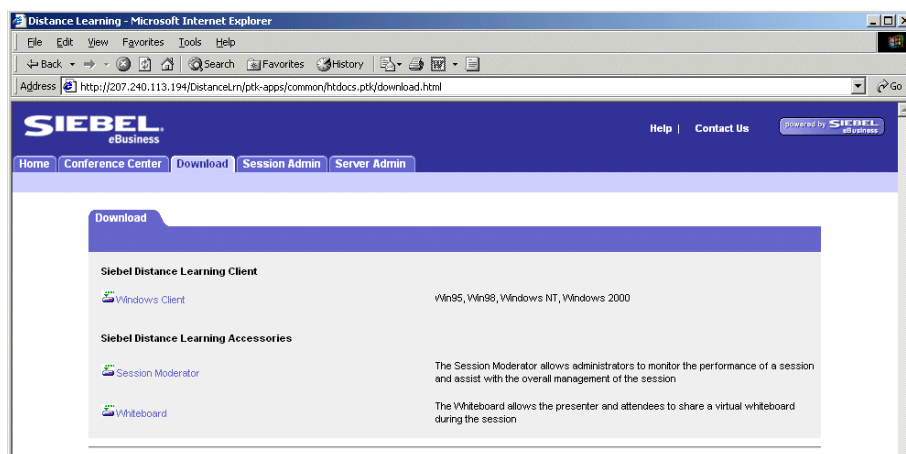
- 1 Navigate to the Download screen.

---

**NOTE:** For information on navigating in Siebel Distance Learning, see [“Navigating Siebel Distance Learning Attendee Screens” on page 109.](#)

---

The Download list appears. The Download list displays the client types that can be downloaded.



- 2 In the Download list, click the Windows Client hyperlink.

Another page appears showing instructions for downloading the selected Siebel Distance Learning client.

## Viewing the List of Scheduled Sessions

You can use a Web browser to view a list of scheduled Siebel Distance Learning sessions.

### To view the list of scheduled sessions






- Navigate to the Conference Center screen.

**NOTE:** For information on navigating in Siebel Distance Learning, see [“Navigating Siebel Distance Learning Attendee Screens” on page 109.](#)

The Siebel Distance Learning Sessions - Main Page appears. The Sessions list displays the scheduled sessions and breakout rooms.

#### Siebel Distance Learning Sessions - Main Page

To join a session, click the session name.

Sessions						
Breakout Rooms : choose one ▾						
🔒	Session Name	Start	Description	Attachment	Replay	HTML Viewer
	<a href="#">Getting Started with Distance Learning</a>	02/22/01 04:32 AM	(na)			
	<a href="#">Sample Meeting</a>	02/22/01 04:32 AM	(na)			
	<a href="#">steve s workshop</a>	04/27/01 10:54 AM	(na)			
	<a href="#">test</a>	04/13/01 03:26 PM	(na)			

## Displaying or Hiding Interface Elements

While you are using Distance Learning to attend a session, you can display or hide several interface elements. You may want to change which of these elements you see depending on the activities that take place at different times during the session.

The following paragraphs describe the functions of several interface elements that can be viewed or hidden, and provide guidelines for deciding which ones to view at any given time.

---

**NOTE:** When attending a custom session, you may not be able to access some of the options. Presenters determine which options are available to attendees during a custom session.

---

**Toolbar.** Provides quick access to many Distance Learning commands, both for attendees and instructors. The toolbar is most useful to attendees as a quick way to choose the Raise Hand command, open a chat dialog box, or save a copy of the current screen display. See [“Using the Siebel Distance Learning Toolbar to Attend a Session” on page 121](#) for more information about the toolbar.

**Audio Control dialog box.** Allows audio transmission through the built-in Voice Over IP feature in Distance Learning. See [“Using Audio During a Distance Learning Session” on page 119](#) for more information about the Audio Control toolbar.

**Chat dialog box.** Provides a way to exchange text messages during a session. It is useful as a way to display a text chat exchange to session participants, ask questions, or exchange information on a one-to-one basis without disturbing other session participants.

### ***To display or hide a user interface element***

- Choose the interface element you want to display or hide from the View menu.

---

**NOTE:** In full screen mode, it is often useful to hide the toolbar to get more screen real-estate.

---

## Using Audio During a Distance Learning Session

Audio is an important component of Siebel Distance Learning sessions. Unless you are attending a session that has been specifically designed for visual transmission only, you need to be able to hear your instructor's explanations as you look at the material being presented. You may also want to be able to hear the voices of other session attendees. The following paragraphs describe two ways to enable the use of audio during a Distance Learning session.

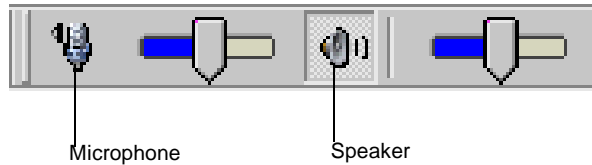
**Telephone conference call.** During most Siebel Distance Learning sessions, the presenting organization arranges for a telephone conference call that attendees can join. Consult the presenting organization for information about how to participate in such a call. This information may be placed in the Description field on the Sessions page or in the first screen you see after joining the session.

**Voice Over IP.** If session participants (including the instructor) use high-speed network connections to participate in the session, and if participating computers are equipped to send and receive audio, you may be able to use the built-in Voice Over IP feature of Siebel Distance Learning. Consult the presenting organization for more information.

#### **To use Voice Over IP sound transmission**

- 1** Choose View > Audio Control.

The Audio Control toolbar appears.



- 2** Click the Microphone icon when you want to transmit audio to other Distance Learning participants.

Your audio transmits continuously to the attendees until you click the Microphone icon again. Only one person should be using the microphone at one time.

- 3** Click the Speaker icon when you want to receive audio from other Distance Learning participants.

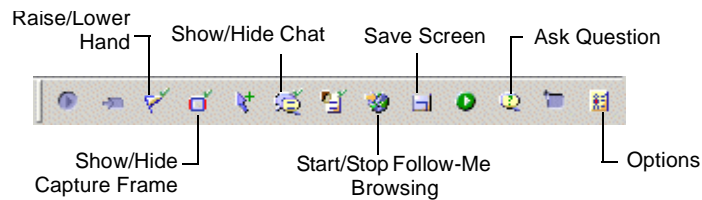
You receive audio continuously from other Distance Learning participants until you click the Speaker icon again.



## Using the Siebel Distance Learning Toolbar to Attend a Session

Siebel Distance Learning allows you to show or hide a toolbar that provides quick access to several useful commands. The following paragraphs describe the buttons an attendee will see on the toolbar, as shown in [Figure 2](#), in their order from left to right. The buttons not described here are the same as for instructors. For more information, see [“Using the Siebel Distance Learning Toolbar to Conduct a Session” on page 68](#).

**NOTE:** You can display a ToolTip identifying label for any toolbar icon by clicking the toolbar to select it, then positioning your cursor over the icon and holding it still for a few seconds.



**Figure 2. Siebel Distance Learning Attendee Toolbar**

**Raise/Lower Hand.** Allows a Distance Learning attendee to request the instructor’s attention or revoke a request for the instructor’s attention.

# Configuring User Preferences

You can customize many features of the Siebel Distance Learning client. Once you make a change in your preferences, the change is reflected in each session you join. The options you can configure include automatic resizing of the view area, doorbell transmission (the sound that other participants hear when you join a session), and behavior when receiving external moderator commands.

#### **To access the Preferences tab of the Options dialog box**

- After joining a Distance Learning session, choose Options > Preferences.

The Preferences tab of the Options dialog box appears.

You can configure your preferences to automatically resize the viewing area to match the area being captured by the instructor. Normally, you change the size of the displayed view region by dragging an edge or corner with your mouse, as you would any other Windows-based application. If the presenter is displaying a region larger or smaller than your own screen, scrollbars will be enabled automatically.

#### **To set up automatic resizing of the view area**

- Click Auto-size view area under General Controls.

You can configure your preferences to control both the transmission of your own doorbell sound to other attendees and whether you hear their doorbells when they enter sessions. For more information about doorbell sounds, see [“Personalizing Your Presence in the Session” on page 124](#).

#### **To set up preferences to transmit and play sounds**

- Select the Sound check box to use transmission and reception of doorbell sounds.
- Clear the Sound check box to disable transmission and reception of doorbell sounds.

You can configure your preferences to control how your Distance Learning session responds when it receives an external command from a session moderator.

***To change behavior for receiving external commands***

- Choose one of the following values from the When Receiving Moderator Messages dialog box:
  - **Prompt before executing.** An incoming command from a Moderator causes a prompt to be displayed on the screen. You can then refuse the transmission, allow it, or select options for future transmissions. This is the default value for the setting.
  - **Always accept and execute.** Allows future actions. For example, you may find that your customized mouse pointer appears or that an active presentation pauses or resumes.
  - **Never accept or execute.** When the moderator grants you permissions, they are automatically declined.

***To change the size of the buttons on the toolbar***

- To increase Toolbar button size, select the Use big buttons check box.
- To decrease Toolbar button size, clear the Use big buttons check box.

***To set other options***

- Prompt for Follow-Me Browsing

If this box is checked, every time you start a follow-me session, you will be prompted to enter the URL that you would like to visit (for the first page, from then on you can use the browser to navigate).

If this box is not checked and if you have entered a URL in the WWW Address field for your personal information, you will be taken to the specified URL every time you start a follow-me session. If you have not entered a URL in the WWW Address field for your personal information, you will be taken to the default URL.

- Notify Chat each time

If this box is checked, when the chat box is minimized and someone attempts to chat with you, the Online Chat dialog box will appear.

If this box is not checked, when the Online Chat dialog box is minimized and someone attempts to chat with you, the minimized Online Chat dialog box will begin blinking to alert you.

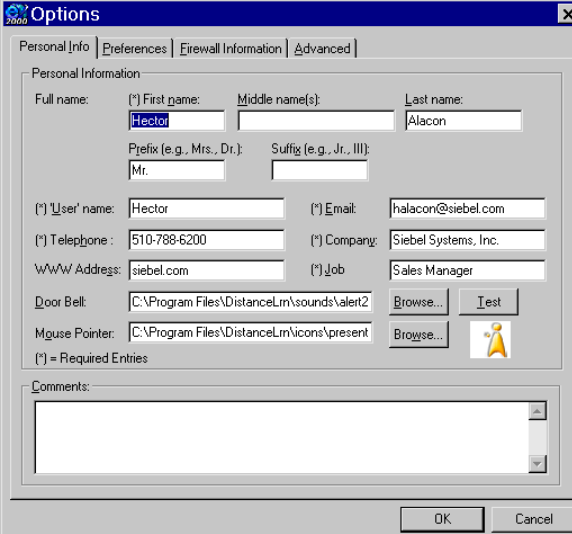
## Personalizing Your Presence in the Session

When you enter a session, your default icon is displayed to anyone who has chosen View > Icon Bar. In addition, a doorbell sound plays if you selected Sound in the Preferences dialog box. You can personalize both the icon and the sound.

### To personalize your icon and doorbell

- 1 Use one of the following methods to display the Options dialog box:
  - After joining a Distance Learning session, choose Options > Personal Info.
  - In Windows, choose Start > Programs > Siebel Distance Learning > Client > Configure Personal Information. By using this method, you can configure your personal information before joining a session.

The Personal Info tab of the Options dialog box appears.



The screenshot shows the 'Options' dialog box with the 'Personal Info' tab selected. The 'Personal Information' section contains the following fields and values:

Full name:	
(*) First name: Hector	Middle name(s):
Last name: Alacon	
Prefix (e.g., Mrs., Dr.): Mr.	Suffix (e.g., Jr., III):

(*) User name: Hector	(*) Email: hlacon@siebel.com
(*) Telephone: 510-788-6200	(*) Company: Siebel Systems, Inc.
WWW Address: siebel.com	(*) Job: Sales Manager

Door Bell: C:\Program Files\DistanceLm\sounds\alert2 [Browse...] [Test]

Mouse Pointer: C:\Program Files\DistanceLm\icons\present [Browse...] [Icon]

(\*) = Required Entries

Comments: [Text Area]

[OK] [Cancel]

- 2 Enter your name and any other information you want to share with session participants.

- 3** Click the Browse button next to the Mouse Pointer field and select a graphic to personalize the mouse cursor that is displayed whenever you make your cursor visible. You can also use your own customized pointer by importing a .bmp file and selecting it.
- 4** If you selected Doorbell on Entry on the Preferences tab of the Options dialog box, click Browse next to the Door Bell field to select a sound to play when you join a session.
- 5** Click the Browse button next to the Icon field, and then select a graphic to personalize the icon that appears whenever you join a session.
- 6** Click OK to save your choices.

## Requesting Attention During a Session

During a live Distance Learning session, any attendee who has downloaded the Siebel Distance Learning client software can ask for the instructor's attention by using the Raise Hand command. The instructor may reply to a raised hand by voice, if audio is being used in the session, or the instructor may send a chat message to the attendee. If several attendees use the Raise Hand command, the instructor can consult the User List to see who requested attention first.

### ***To request the instructor's attention***

- Choose Presentation > Raise Hand or click the Raise Hand button on the toolbar.

In the User List, your name also changes color (to red, by default), and a timestamp appears next to your name indicating when you requested attention. In the Icon bar, the border of your icon and the label underneath your icon also change color.

The effects of the Raise Hand command do not automatically clear when the instructor addresses your question. Use the following procedure to return your icon and listing to normal coloring. Note that when the Raise Hand command is selected, both its menu item and its toolbar button change to Lower Hand.

### ***To clear a request for the instructor's attention***

- Choose Presentation > Lower Hand or click the Lower Hand button on the toolbar.

The coloring returns to normal for the hand icon in your toolbar, your icon in the Icon bar, and your name in the User List. The timestamp for your last request is removed from the User List.

## Using Chat Sessions While Attending a Distance Learning Session

Siebel Distance Learning includes a chat feature that you can use to exchange text messages with a selected session participant, such as an attendee or instructor, or with participants.

---

**NOTE:** This option may not be accessible in group or multi-level sessions.

---

### ***To exchange text messages during a session using the Online Chat dialog box***

- 1** Choose View > Chat.

The Online Chat dialog box appears.

- 2** Select a value from the Send Chat picklist.

You can select one session participant to chat with or you can select Everyone to send your message to all session participants.

If you send a message to the instructor, it may or may not be visible to other session participants, depending on whether or not the instructor has selected Display Text Chat Window To Attendees.

- 3** Type your message in the text field at the bottom of the Online Chat dialog box, and then click Send to transmit it to your intended recipient or recipients.

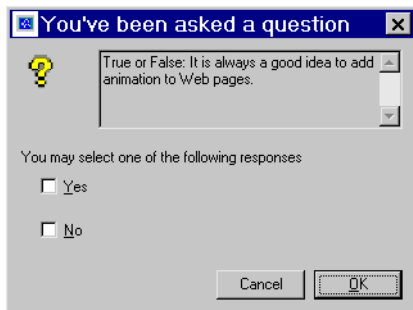
There is a list of predefined messages which recipients can use to send chat messages. Recipients access this list by clicking the down arrow at the bottom of the Online Chat dialog box.

To edit or customize your chat messages, go to Start > Programs > Siebel Distance Learning > Client > Edit Chat Message.

The text of your message is displayed in the upper area of the Online Chat dialog box, labelled with your user name. If you have designated only one recipient, the label also includes the user name of the recipient and indicates that the message was private.

## Responding to Instructor Questions During a Session

During a Distance Learning session, the instructor may ask attendees one or more questions. If attendees are using either the Distance Learning client software or an HTML Viewer, each question is displayed in its own dialog box on the attendees' screens, along with multiple-choice answers or a field where a text answer can be typed. The instructor can also announce the question and answers and send an empty question. A sample quiz question is shown below in [Figure 3](#).



**Figure 3. A Sample Quiz Question**

---

**NOTE:** If the instructor asks a new question before you have answered an earlier question, any answer you send will apply only to the most recent question. If you do not answer a question, that information is also visible to the instructor.

---

### ***To answer a Yes-or-No or multiple-choice quiz question***

- Click to select the check box of the best answer, then click OK.

If the question requires a text answer, the question dialog box displays a text field instead of check boxes.

### ***To answer a quiz question that requires a text answer***

- Type your answer in the Answer text field, then click OK.



## **Saving a Copy of On-Screen Information During a Session**

Occasionally during a session, you may want to save a copy of the information currently being displayed in the Distance Learning session. The following procedure describes how to save this information to a bitmap (.bmp) file. This procedure can be used by either instructors or attendees.

***To save the current Distance Learning screen display to a bitmap file***

- 1** Click the Save Screen button in the toolbar.

A standard Save As dialog box appears.

- 2** Specify a file name and location, and then click Save.

# Viewing a Recorded Distance Learning Presentation

Distance Learning can be used to record and play back presentations that may include synchronized audio tracks. However, the following Distance Learning features are not available when you view a recorded Distance Learning presentation:

- Seeing information about other viewers
- Chatting with other viewers, session attendees, or instructor
- Using the Raise Hand command
- Requesting application sharing
- Responding to instructor quiz questions

#### **To view a recorded Distance Learning presentation**

- 1 Navigate to the Conference Center screen.

---

**NOTE:** For information on navigating in Siebel Distance Learning, see [“Navigating Siebel Distance Learning Attendee Screens” on page 109](#).

---

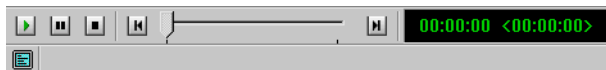
The Siebel Distance Learning Sessions - Main Page appears.

- 2 Find the listing for the session you want to replay, click the Replay icon.

The Replay icon looks like a movie projector.



The Distance Learning - Attending window appears with the Replay toolbar.



- 3 Click the Play button on the Replay toolbar.

The window is resized, screen captures are displayed, and the audio track is played. You can use the buttons on the Replay toolbar to rewind, fast-forward, stop, or start the recorded presentation.

# Index

## Symbols

.csv file, saving to 38

## A

Action Denied error, about 102  
active sessions  
    list viewing 42  
    terminating 43  
administration account  
    making changes to 36  
    new account, adding 35, 36  
application sharing  
    about 100  
    ending 100  
Ask Question button  
    conducting session, using when 69  
attachment, document to Distance Learning session 63  
Attend button  
    conducting session, using when 68  
attendees  
    application sharing, about 100  
    application sharing, ending 100  
    application sharing, using 100  
    attendee information, two methods to view information 82  
    attendee information, viewing during session 83  
    attendee screen, navigating to 109  
    disruptive participant, ejecting 99  
    instructor's attention, requesting and clearing request 126  
    instructor's questions, answering 128  
    interface elements, guidelines for hiding or showing 118

    interface elements, procedure for hiding or showing 118  
    recorded presentation, viewing 130  
    screen information, saving 129  
    session, personalizing 124, 125  
    sessions, viewing scheduled sessions 117  
    toolbar, using to attend session 121  
    Voice Over IP, using during session 119, 120  
audio  
    Voice Over IP, about using 78  
    Voice Over IP, using to conduct session 79  
    Voice Over IP, using when attending session 119, 120  
Audio Control window, guidelines hiding or showing 118  
audit log report, viewing and downloading 38

## B

breakout rooms  
    *See also* Distance Learning session, administering  
    about 58  
    creating 58  
    deleting 59  
    entering 58

## C

Capture Frame  
    about using 74  
    Capture Frame window, controlling size 75

- color when paused 75
- conducting a session, using button
  - when 69
- transmission content, pausing 75
- using to present information 74
- capture rate, changing 77
- Chat button
  - attending session, using when 122
  - conducting meeting, using when 69
- chat sessions
  - chat box, guidelines for showing or hiding 118
  - chat box, preferences for notifying 123
  - text messages, exchanging during a session 86 to 87
  - text messages, using to exchange 127
  - two methods to view information 85
- clustered servers
  - about 40
  - activity logs, viewing and downloading 38
  - Instance Name, configuring to run with different name 19
  - IP addresses, defining 40, 41
- commands, changing behavior when receiving 123
- conference calls
  - attending session, about using 119
  - conducting session, about using 78
- connection problems 106, 107
- cursor
  - status, checking 76
  - visible, to attendees 76

## **D**

- deleting a Distance Learning session 64
- disruptive participant, ejecting 99
- Distance Learning client software
  - See also* license key, file, replacing
  - automatically downloading 114, 115
  - Distance Learning Server, cannot connect to 44

- error when downloading,
  - troubleshooting 102
- installation procedure 17
- limitations 110
- manually downloading 116
- ways to obtain 113
- Distance Learning directories, configuring
  - Netscape iPlanet Web server to recognize 22, 23
- Distance Learning Server
  - Distance Learning software, cannot connect to 44
  - Instance Name, configuring to run with different name 19
  - Netscape iPlanet Web server, configuring 22, 23
  - note, installing on Web server and testing 16, 28
- Distance Learning Server, administering
  - active session, terminating 43
  - active sessions, viewing list 42
  - administration account, making changes to 36
  - audit log report, viewing and downloading 38
  - clustered servers, about clustering servers 40
  - clustered servers, defining IP addresses 40, 41
- Distance Learning client, cannot connect to 44
- HTTP Gateway, configuring 45
- HTTP Gateway, overview 44
- HTTP Viewer, overview and limitations 46
- HTTP Viewer, using 111
- IP address or domain, locking out 36, 37
- license key information, updating 40
- license key information, viewing previous information 39
- new administration account, adding 35, 36

- server administration screen, navigating to 33
- stopping, starting, or restarting service 43
- Distance Learning session, administering
  - breakout rooms, about 58
  - breakout rooms, creating 58
  - breakout rooms, deleting 59
  - breakout rooms, entering 58
  - custom session, creating 52, 53
  - registered users, viewing 55
  - registration session, documents for each session, described 55
  - registration session, setting up 56, 57
  - Session Moderator accessory, about 65
  - Session Moderator accessory, using 65
  - session properties, modifying properties you cannot change 60
  - session, attaching document to 63
  - session, deleting 64
  - session, modifying 60
  - standard session, creating 49, 51
  - whiteboard accessory, about and using 66
- Distance Learning session, attending
  - See also* Distance Learning client software
  - attendee screen, navigating to 109
  - chat window, using to exchange text messages 127
  - instructor's attention, requesting and clearing request 126
  - instructor's question, answering 128
  - interface elements, guidelines for hiding or showing 118
  - interface elements, procedure for hiding or showing 118
  - recorded presentation, viewing 130
  - saving screen information 129
  - scheduled sessions, viewing list of 117
  - session, personalizing 124, 125
  - toolbar, using to attend a session 121
  - user preferences, configuring 122, 123
- Voice Over IP, using during session 119, 120
- Distance Learning session, conducting
  - application sharing, about 100
  - application sharing, ending 100
  - application sharing, using 100
  - attendee information, two methods of viewing 82
  - attendee information, viewing during session 83
  - Capture Frame window, controlling size 75
  - Capture Frame, about using 74
  - Capture Frame, pausing 75
  - Capture Frame, using to present information 74
  - chat sessions, exchanging text messages during session 86 to 87
  - chat sessions, two methods of viewing 85
  - disruptive participant, ejecting 99
  - Follow-Me Browsing session, using 94
  - mouse cursor, making visible to attendees 76
  - planning session, tasks 70
  - quiz questions, preparing 90, 93
  - quiz, giving impromptu quiz to session attendees 88, 90
  - recording session, limitations of 96
  - recording session, procedure 97, 98
  - recording session, replaying 98
  - sharing presentation responsibilities, letting any attendee present information 95
  - sharing presentation responsibilities, letting specific attendee present information 95
  - slide shows, using Show at Once option 80, 81
  - toolbar, using 68, 69
  - video capture mode, enabling 77
  - video capture rate, changing 77
  - Voice Over IP, procedure 79

- Distance Learning Web pages
  - server administration screen, accessing from 33
- document, attaching to Distance Learning session 63
- domains, locking out 36, 37
- doorbell
  - personalizing 124, 125
  - sound, transmitting and receiving sound 122

## **E**

- Excel, importing audit report 38

## **F**

- firewalls, troubleshooting problems
  - with 106, 107
- Follow-Me Browsing session
  - about 69
  - URL, prompting for 123
  - using 94

## **G**

- Group sessions, granting application sharing 100

## **H**

- Hand button, using when attending session 121
- HTML Viewer, using due to connection errors 106
- HTTP Gateway
  - configuring 45
  - connection errors, using due to 106
  - overview 44
  - Web servers, conflicting with 21
- HTTP Viewer
  - overview and limitations 46
  - using 111

## **I**

- icons, personalizing 124, 125

- IIS4 (Microsoft), configuring Web server 103, 104
- installing. *See* Distance Learning client software; JRun; Java Software Developer's kit
- Instance Name, configuring server to run with different instance name 19
- instructor's
  - attention, requesting and clearing request 126
  - questions, responding to 128
  - quiz questions, preparing ahead of time 90, 93
  - quiz, giving impromptu quiz to session attendees 88, 90
  - responsibilities 10
- interface elements
  - guidelines for hiding or showing 118
  - procedure for hiding or showing 118
- IP addresses
  - clustered Distance Learning servers, defining for 40, 41
  - locking out 36, 37
- iPlanet Web server, configuring for Distance Learning directories 22, 23

## **J**

- Java Software Developer's Kit,
  - installing 12
- JRun
  - installation steps 12
  - installing 12, 13
  - JRun Management Console, configuring to run with 14, 16, 26, 28

## **L**

- license key
  - file, replacing 23, 29
  - information, updating 40
  - information, viewing previous information 39

locking out, ejecting disruptive participant 99

## M

Meeting Manager HTTP port, default port number 19  
 Meeting Manager service port, default port number 19  
 memory requirements  
     Distance Learning client, installing 113  
 Microsoft  
     Excel, importing audit log report 38  
     IIS4, configuring Web server 103, 104  
 mouse cursor  
     making visible to attendees 76  
     status, checking 76  
 Multi-level sessions, granting application sharing 100

## N

Netscape  
     Enterprise Server, configuring Web server 105  
     iPlanet Web server, configuring for  
         Distance Learning directories 22, 23  
 network errors, troubleshooting 106

## O

Online Chat dialog box  
     conducting meeting, using when 69  
     showing or hiding, guidelines for 118  
 operating system requirement  
     Distance Learning client, installing 113  
 Options dialog box  
     conducting session, using when 69  
 options-preferences.doc, setting options for 123

## P

password  
     troubleshooting, prompted for 102  
 Pause button

conducting a session, using when 68  
 information transmission, using to pause 75

Pointer On/Off button, using when conducting a session 69

preferences, configuring 122, 123

Present/Attend button  
     conducting session, using when 68

presentations

*See also* slide shows

recorded session, viewing 130

sharing responsibilities, letting any

    attendee present information 95

sharing responsibilities, letting specific  
     attendee present information 95

presenters

    application sharing, about 100

    application sharing, ending 100

    application sharing, using 100

processor speed requirements

    Distance Learning client, installing 113

## Q

questions

    ask question button, using when  
         conducting session 69

    instructor questions, responding to 128

quizzes

    instructor's questions, answering 128

    questions, preparing ahead of time 90,  
         93

    session attendees, giving to 88, 90

## R

recorded presentation, viewing 130

recording session

    limitations of 96

    procedure 97, 98

    replaying 98

    stop/start button, about 69

registration session

*See also* session

- documents for each session,
  - described 55
- registered users, viewing 55
- setting up 56, 57
- responsibilities, for setting up and using
  - Distance Learning 10
- restarting Distance Learning servers 43
- Resume button, using when conducting a session 68
- roles, for setting up and using Distance Learning 10

## **S**

- Save Screen button
  - conducting session, using when 69
- screen information, saving 129
- server administration screen, navigating to 33
- server administrator tasks
  - active session, terminating 43
  - active sessions, viewing list 42
  - audit log report, viewing and
    - downloading 38
  - clustered servers, about 40
  - IP address or domain, locking out 36, 37
  - IP addresses, defining for Distance Learning servers 40, 41
  - license key information, updating 40
  - license key information, viewing previous information 39
  - new administration account, adding 35, 36
  - new administration account, making changes to 36
  - stopping, starting, or restarting service 43
- server components and extensions,
  - installing
    - Java Software Developer's Kit 12
    - JRun 12, 16, 28
    - license key file, replacing 23, 29
    - Siebel Distance Learning Server,
      - configuring Netscape iPlanet Web server 22, 23
    - Siebel Distance Learning Server,
      - installation procedure 17
  - Server Manager service port, default port number 19
- servers
  - activity logs, viewing and
    - downloading 38
  - clustered server, about 40
  - Instance Name, configuring to run with different name 19
  - IP addresses, defining 40, 41
- session
  - application sharing, ending 100
  - application sharing, using 100
  - instructor's attention, requesting and clearing request 126
  - personalizing 124, 125
  - registration session, documents for each session 55
  - registration session, setting up 56, 57
  - registration session, viewing registered users 55
  - text messages, exchanging 127
- Session Moderator accessory
  - about 65
  - using 65
- Show at Once option
  - optimizing presentation, using for a 80, 81
- Show Now button, using when conducting a session 68
- Siebel Distance Learning directories,
  - configuring Netscape iPlanet Web server to recognize 22, 23
- Siebel Distance Learning Server software,
  - installation procedure 17
  - See also* Distance Learning client software
- Siebel Distance Learning session. *See individual Distance Learning session entry*



- Siebel System Administrator, responsibilities 10
- slide shows
  - See also* presentations
  - Show at Once option, using for a 80, 81
- Snap On button, using when conducting a session 69
- sounds, transmitting and playing, setting up 122
- Start 48
- starting Distance Learning Servers 43
- stopping
  - application sharing 100
  - Distance Learning Servers 43

## T

- technical support
  - troubleshooting information, providing 101
- telephone conference calls
  - attending session, about using 119
  - conducting session, about using 78
- text messages, exchanging using chat window 127
- The 32
- tips, identifying label for toolbar icon 68
- toolbar
  - about and diagram 68, 69
  - attending session, using to 121
  - buttons, changing size and defaults 123
  - hiding or showing, guidelines for 118
- training administrator, responsibilities 10
- troubleshooting
  - Action Denied error, about 102
  - Distance Learning Server, cannot connect to 44
  - downloading client, error occurs 102

- firewall problems 106, 107
- network errors 106
- password, prompted for 102
- technical support, information to provide to 101
- Web server installation errors 103, 105

## U

- UnSnap button, using when conducting a session 69
- User List
  - displaying and hiding 69
  - viewing during a session 83
- user preferences, configuring 122, 123

## V

- video
  - capture rate, changing 77
  - video capture mode, enabling 77
- viewing area, setting up automatic resizing 122
- Voice Over IP
  - about using 78
  - attending session, using during 119, 120
  - conducting session, using 79

## W

- Web server
  - configuring 103
  - HTTP Gateway, conflicting with 21
  - Microsoft IIS4, configuring server 103, 104
  - Netscape Enterprise Server, configuring server 105
  - planning and installation 16, 28
- whiteboard accessory, about and using 66

