



# **CollabraSuite, BEA WebLogic Edition**

## **User Guide**

Version 3.8  
January 2006

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# Introduction

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

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

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








Visit [www.collabraspace.com](http://www.collabraspace.com) for more information on CollabraSpace and our products. For help and support, please visit <http://support.bea.com>.

# Toolbar Options

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

**Table 1: Toolbar Options**

Toolbar Button	Description
 <b><u>Manual Scrolling</u></b>	Manually control the room chatter display.
 <b><u>Idle</u></b>	Alert other online users that you are user will be idle within the collaborative environment.
 <b><u>Lock Room</u></b>	Lock or unlock the current room.
 <b><u>Mark Chat Messages</u></b>	Highlight the room text that has already been read in the Text Chat area.
 <b><u>Whiteboard</u></b>	Open the whiteboard to view the current session.
 <b><u>Chat</u></b>	Access the Public Chat window.
 <b><u>Room Navigator</u></b>	Display the Room Navigator.
 <b><u>Online Users</u></b>	Display the users currently logged into the system.
 <b><u>Skill Search</u></b>	Search for users by skill.
 <b><u>Room Occupants</u></b>	View room occupants.
 <b><u>Page Viewer</u></b>	View archived pages.
 <b><u>Briefcase</u></b>	Launch the document navigator displaying the contents of the user briefcase.
 <b><u>File Cabinet</u></b>	Import a document into a room file cabinet.
 <b><u>Audio Conference</u></b>	Participate in an audio conference with other users in the same room.

 <b><u>Audio/Video Conference</u></b>	Participate in an audio/video conference with other users in the same room.
 <b><u>Preferences Editor</u></b>	Display the Preferences Editor.
 <b><u>Associates</u></b>	Display the user's Associates.
 <b><u>User Information</u></b>	Display detailed User Information on a selected user account.
 <b><u>Send Page</u></b>	Send a page to selected online user(s).
 <b><u>Phone</u></b>	Establish a point-to-point audio phone call to a selected user.
 User Guide	Display this User Guide in a browser.

## Minimum System Requirements

The following is a list of the minimum system requirements to run the CollabraSuite software.

### Minimum Hardware:

- Intel Pentium 700MHZ CPU with 256MB RAM
- Sun UltraSparc IIe 500 MHz CPU with 256MB RAM
- G4 CPU with 256MB

### Supported Operating Systems:

- Windows XP, XP-Pro, 2000, 2000-Pro
- Solaris 2.7, 2.8, 2.9
- MAC OS X 10.4
  - Single button mouse is only supported with the default look-and-feel. Other skins require a two button mouse.

### Supported Browsers:

- IE 5.5, 6.0
- NS 7.0, 7.1 Mozilla 1.7, Firefox 1.0
- Epiphany
- Galeon 1.3.18

## Minimum System Requirements

- Safari 2.0.1

## **Supported Java Plugins:**

- Java Plugin 1.3.1 or later

## **Supported Audio/Video Capture Devices:**

- Windows capture devices that have Video For Windows (VFW) drivers
- Solaris SunVideo/SunVideoPlus capture devices
- Linux capture devices that have Video4Linux drivers



# Release Notes

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## ***Version 3.8.0***

### **General**

- Added support for MAC OS X.
  - Added WebLogic Installer.
  - Added WebLogic Portal Extension Template
  - Added Integration API Developer's Guide
- 

## ***Version 3.7.0***

### **General**

- Users can customize the format and timezone used to display dates and times.

### **Associates**

- Associates component toolbar added.
- Users can't add themselves as an associate.
- When a user is deleted they are automatically removed from all associate lists.

### **Audio/Video**

- Users can now set the multicast Time To Live (TTL) for audio/video conferencing for each campus.

### **Chat**

- Fixed inconsistent behavior with sidebars and idle messages.
- Idle users can not be added to a sidebar session.
- The sidebar creator is notified if all participants were not available to join the session, being off-line or idle.

### **Documents**

- Fixed issue that allowed local document edits to be lost when opening and closing the file multiple times before checking them in.

## Release Notes

- Users are now prompted before overwriting local files.

### **Online Users**

- Combined the idle status and the idle comment columns.
- Fixed issue that allowed users to appear to be in two rooms at once.

### **Whiteboard**

- Fixed inconsistent popup menu options.
- Participant selection is cleared when the whiteboard session is cleared.

### **Server**

- Improved license key support for servers with multiple network interfaces.
  - Added an integration API so third parties can integrate their own software with CollabraSuite.
- 

## ***Version 3.6.0***

### **General**

- Added user preferences for showing user icons in the Room Occupants, Whiteboard Participants, and Audio/Video Participants windows.
- Added support for searching online help.
- Added an Installation Guide and Administration Guide to online documentation.
- Added "Start Date" to current Session Information Dialog.
- Added the ability to assign a priority to pages.
- Improved error messages when the browser has no Java Plugin.

### **Associates**

- Added the concept of an Associates List. This is a list of people the user frequently collaborates with.
- Users can quickly view detailed presence awareness for the associates.
- Users can set preferences to receive audio alerts when associates enter/exit their room.

### **Audio/Video**

- Reduced memory requirements for audio/video conferencing.
- Improved reliability and decreased startup time of audio/video conferencing.
- Added a mute button to the audio component.

- Placing several consecutive phone calls now works correctly.
- Phone calls are no longer canceled when the window is minimized.

## Chat

- Added the ability to assign a priority to chat messages.
- The Chat Monitor can now filter messages based on their priority.
- Multiple idle messages can now be entered by pressing the enter key or clicking Apply.

## Documents

- Added support for large documents.
- Added a progress dialog for document transfers between the client and server.

## Whiteboard

- File menus and popup menus are now consistent.
- Whiteboard now uses scrollbars to display large background images.
- When exporting the whiteboard to an image, the entire area is now saved instead of saving just the visible area.

## Server

- Improved support for Sybase and Pointbase databases.
- Added support for MySQL databases.
- The Organization list on the User Details page is now sorted.
- The setUserInfo JSP tag no longer updates the home room of an existing user. Also added a "updateUser" attribute to disable all updates to an existing user.
- A new campus now receives a default multicast address of 232.0.0.1.
- Added support for WebLogic's "FrontEndHost" and "FrontEndPort" settings within the sample CollabraSuite portlets.

## Performance

- Improved performance for copying documents.
- More efficient database interaction storing and retrieving documents.

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## Version 3.5.0

### General

- Added better error handling when a user can't enter their initial room.

## Release Notes

- Users are notified if they have been disconnected from the server.
- Users can choose between several supported skins.
- Pages and notes can be printed.
- The User Info component can be used to search for users.
- Improved checking for the length of input data.
- Fixed broken support for Java Plugin 1.3.1.
- Added support for Java Plugin 1.5.

## Chat

- Sidebar sessions can be initiated with one or more users. A sidebar session does not take place within the context of a room. Users from multiple locations may participate. The session ends when all users exit. Sidebar sessions can be named and later retrieved just like room sessions.
- Manual scrolling of the chat monitor is more intuitive.
- The chat monitor display can be limited to chat and exclude enter/exit messages.
- Fixed a threading issue that could cause two chat messages to appear on the same line in the chat monitor.
- Room sessions can be named.
- Empty room sessions are ignored during retrieval.
- Users can specify a text message to be displayed when they mark themselves as idle.
- Users can enable/disable audio notification of enter/exit events.

## Documents

- Users can search for documents based on their name and description.
- Room administrators have permission to manage documents in the room's file cabinet. Room administrators can also cancel a document edit.
- Users can directly view a document's access report from the popup menu.
- Reorganized the document popup menu and renamed menu items from "Open" and "Open With..." to "View" and "View With..."
- Users can specify the location for their document cache and clear their cache.
- The document cache filenames mirror the document name to allow documents in the same folder to reference one another.
- Users can query document history based on a room.
- The room document store is consistently referred to as the room file cabinet.
- Users can specify read/write ACLs and subscribers when importing a document.
- Users are notified during document checkin if the document has not been changed since checkout.

- Documents and folders are sorted in the Document Navigator.
- Failed attempts to access a document are recorded correctly.
- Users can quickly page all subscribers of a document or folder from the document popup menu.
- Fixed issue with copying a document that had read/write ACLs specified.
- A message is displayed when the document bulk import has completed.
- Fixed issue where user would view the previous document when a document with the same name had previously existed.
- Document export filechooser behaves correctly for multiple exports.
- Users can move folders and documents via drag and drop.
- Users can import folders and documents via drag and drop.

## Room Navigator

- Users can search for a campus, building, floor, or room based all or part of its name or description.
- Users can hide the description and/or icon panels.
- Users can easily page campus, building, floor, and room administrators from the popup menu.
- Users can easily administer a selected campus, building, floor, or room from the popup menu.
- Room Navigator is dismissed when the user selects a room to enter.

## Online users

- Online User column sorting, column order, and column sizes persist between sessions.
- Users can filter Online Users based on the content of any column.
- Added a User Organization column.

## Whiteboard

- Users can move objects around the whiteboard by dragging them.
- Users can enable/disable tooltip annotations.
- Fixed broken stamp functionality.
- Added support for PNG images.
- Users can select a background image by dragging a document from their file cabinet or briefcase. Supported document types include GIF, JPG, PNG, HTML, and TXT.

## Server

- Added ability to prepend and append text to every email sent by CollabraSuite.
- Portlet exceptions are caught and logged appropriately.
- A more descriptive error message is displayed when an invalid campus name is specified during login.

## Release Notes

- Users can be cleanly deleted from a campus.
- Added more descriptive error messages in the admin web application.
- Improved the speed of report generation.
- Reports can be exported to a comma separated file so they can be imported into other applications such as Microsoft Excel.
- User and group lists can be filtered for improved ease of use with large numbers of users and groups.
- Added a date chooser popup for specifying dates in the report criteria.
- Users can no longer create circular groups where GroupA contains GroupB and GroupB contains GroupA.

## Performance

- Added more efficient database interaction via WebLogic field-groups.
- Document contents are no longer loaded to calculate their size.
- Pages are no longer fetched twice per login.
- Increased several WebLogic entity bean cache sizes. This was causing performance problems in large collaboration environments.
- Reworked entity locking to eliminate deadlocks and reduce bottlenecks.

# Virtual Rooms


## *Room Occupants*

The CollabraSuite Room Occupants component allows users within a room to visually see who else is in the room either by user name alone or with images selected by the individual users. When a user enters a room, their presence in the room is indicated in the Room Occupants component located next to the Text Chat component.

Each user has the option of displaying the images that users have selected for themselves in their user profile, or hiding the images for a more compact display. User images can be enabled or disabled in the [Room Occupants](#) tab of the [Preferences Editor](#). Additional icons are displayed beside each user indicating if the user is viewing the whiteboard or is idle.

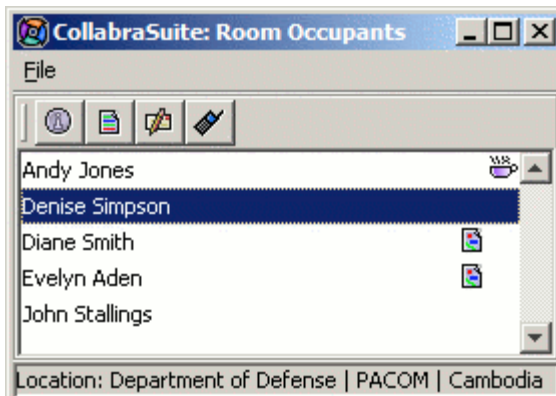
Additional features of the Room Occupants component are accessing [additional information](#) about other users, initiating a [sidebar conversation](#), sending a [page](#), and placing [point-to-point calls](#) to other users in the room.

### To access the additional features of the Room Occupants component:

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

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

**Figure 1: Room Occupants**



## Room Navigator

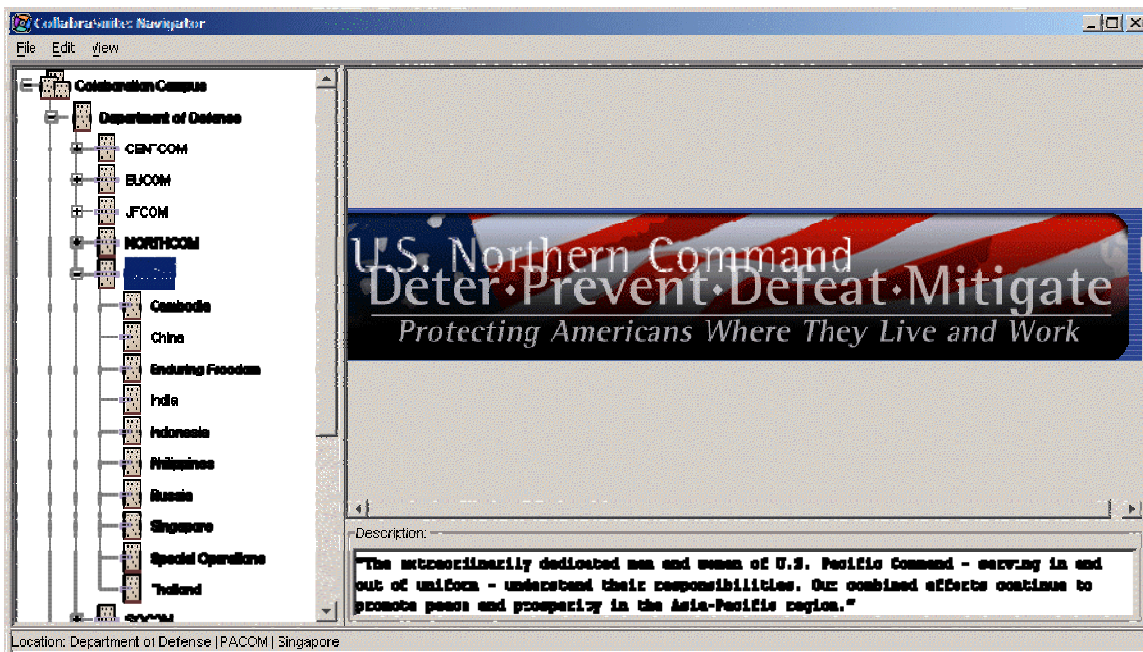
The CollabraSuite environment is easily navigated by way of a hierarchical display of the campus, buildings, floors, and rooms. The navigator provides a detailed description and image of each component within the virtual space and allows users to instantly enter a selected room. The descriptions and images can be hidden via the [Room Navigator](#) tab on the [Preferences Editor](#).

### To access the Room Navigator:

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

The Room Navigator window will appear.

**Figure 2: Room Navigator**



### To search for a building, floor, or room:

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

### To enter a room:

1. Select a room from the navigation tree on the left.

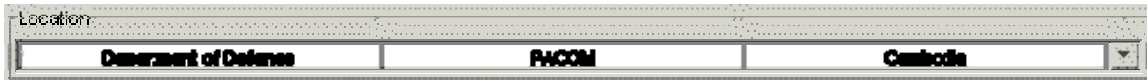


- Right-click and select **Enter Room** from the context menu. You will be moved to the selected room.

### Room Location

The CollabraSuite Room Location component displays a history of previously visited rooms. In some cases, the URL parameter will have been set to show all available rooms. Once in a room, the Location component, shown below, is found directly under the toolbar displaying the user's current location. This component can also be used as a quick navigation to a desired room in lieu of using the Room Navigator component.

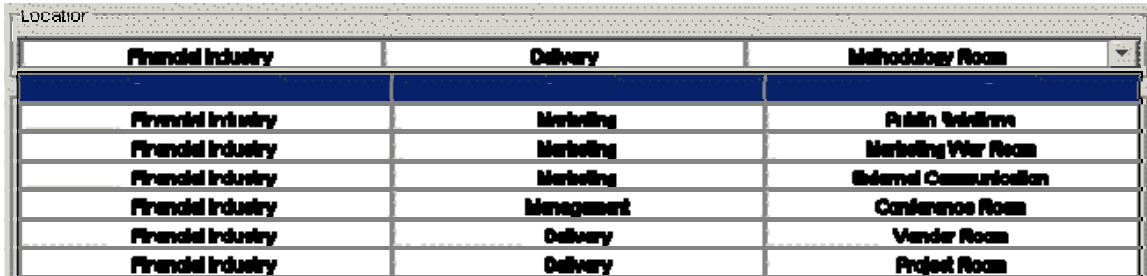
**Figure 3: Room Location**



#### To enter a room using the Room Location component:

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

**Figure 4: Room Location History**



## Collaboration Components

### Text Chat

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

will pop-up on the recipient's screen. All chat sessions and pages are recorded and archived so they can later be searched to provide a context for discussion history.

## Access the Public Chat window

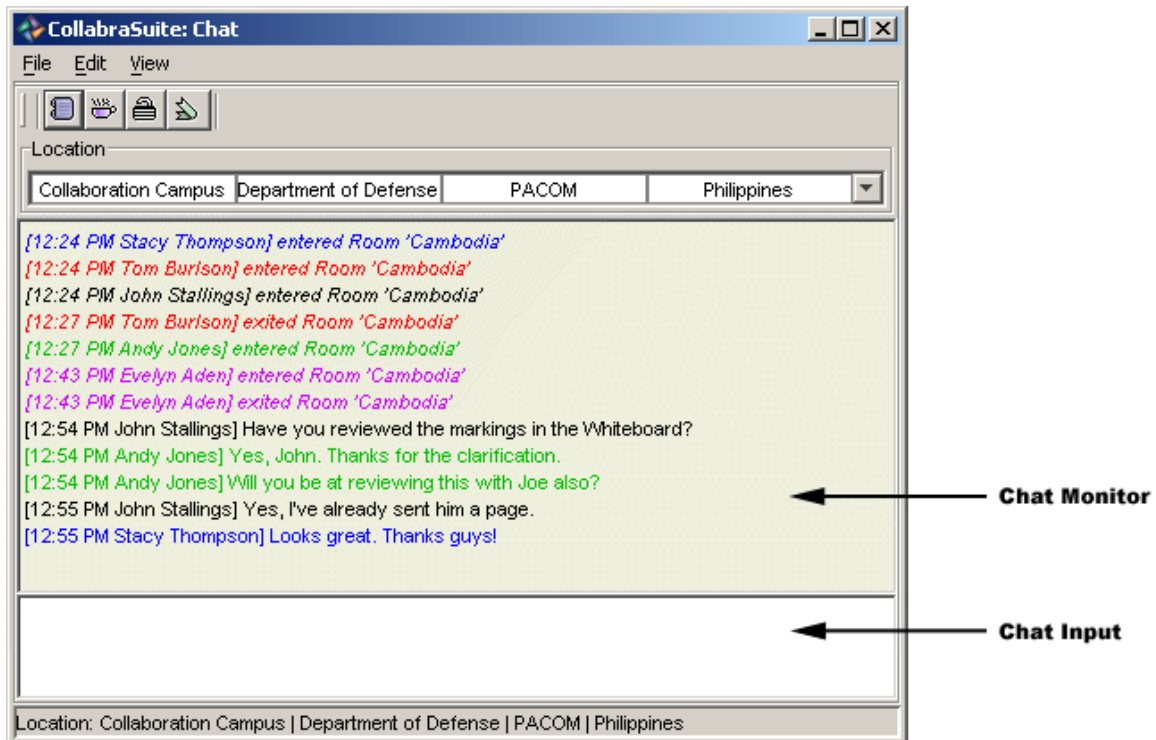
Usually, the Public Chat window is set up to display upon entry to a room, including the Chat Messages, Chat Input, and Room Occupant fields. If the Chat window does not display upon entry in the room, a separate Chat window may be opened in order to display the public chat for that room.

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

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

The Chat window will display.

**Figure 5: Chat**



## Initiate a Public Chat Session

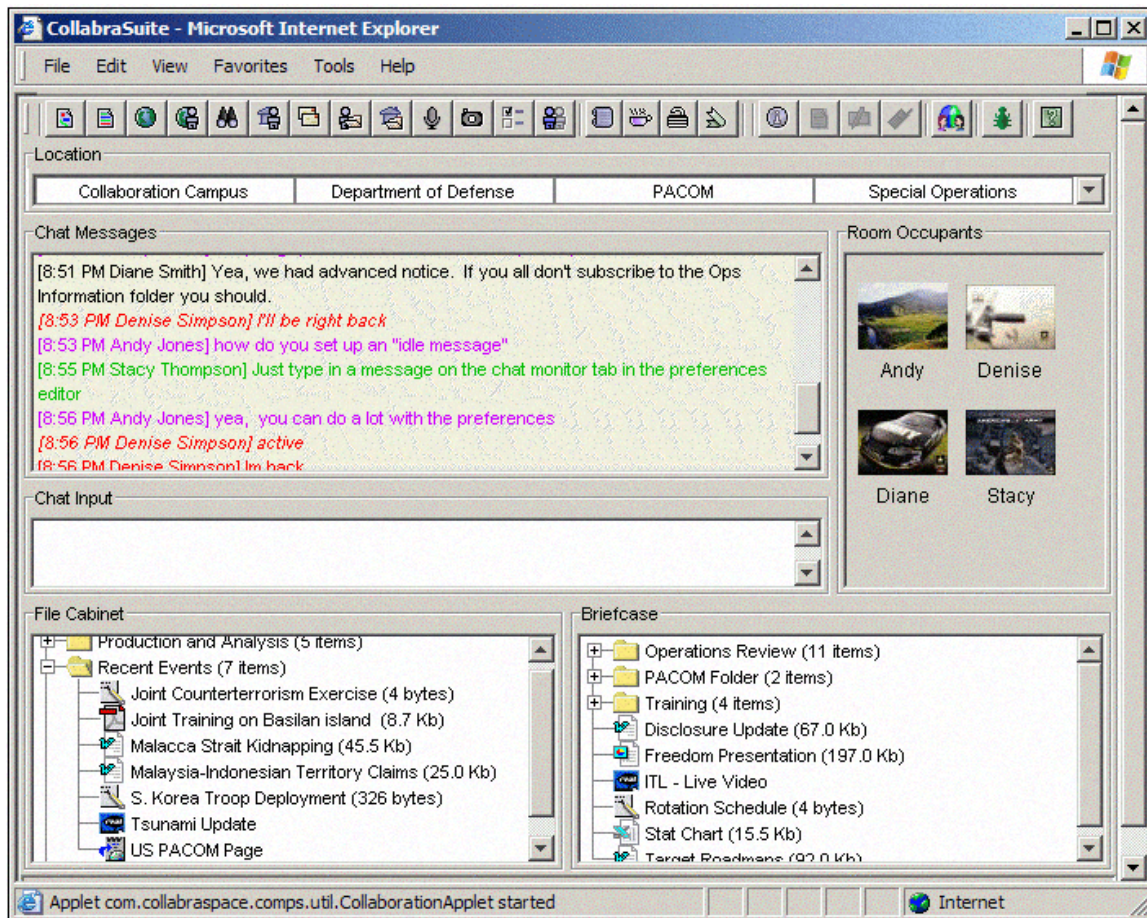
Public chat sessions enable users to send instant chat messages to everyone in a room simultaneously. When users enter a room, the chat session is usually displayed with the current chat displayed in the Chat Messages field. Every message sent during the session may be viewed by any user in the room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

### To initiate a public chat session:

1. Enter a text message in the **Chat Input field**, located under the Chat Messages field.
2. Press the **enter key**.

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

**Figure 6: Public Chat**

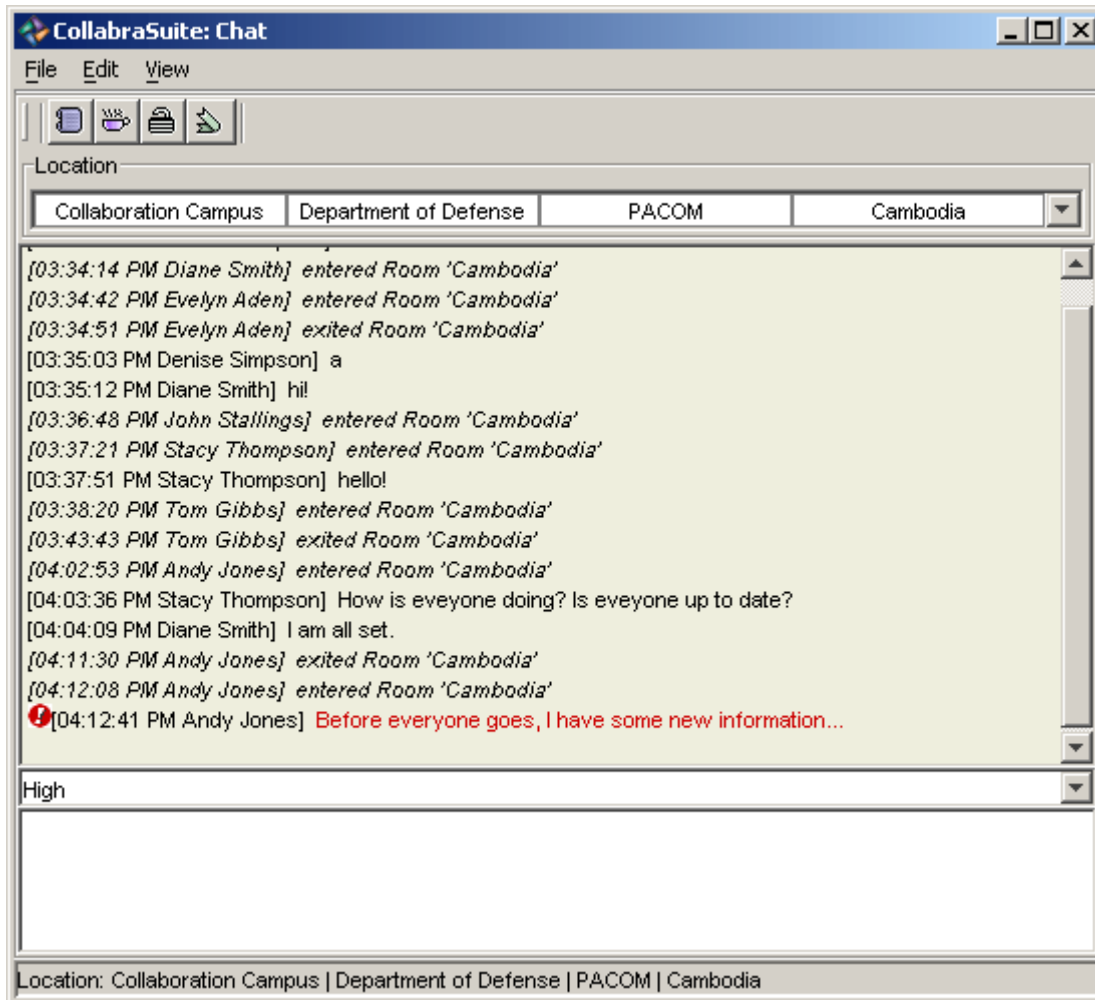


## Chat Priorities

Messages in the public room chat may be marked for priority. This enables users to mark, view, and filter messages by importance. Each user may assign a priority to each message. Messages marked for priority will be displayed in the Chat Messages field with a priority icon. Default colors for the priority icon are red for high priority, orange for medium priority, and green for low priority. Colors can be customized in the [Chat Monitor](#) tab of the [Preferences Editor](#). If no priority has been selected for the message, no icon will display.

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

**Figure 7: Priority Chat**



### **To assign a priority to a message:**

1. Select a priority level (low, medium, or high) from the priority drop-down list in the **Chat Input section** of the window.
2. Type the priority message in the Chat Input field.
3. Press the enter key.

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

### **To filter by priority:**

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

Only the messages that match the filter will be displayed in the Chat Messages field.

## ***Chat Session Information***

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

### **To assign detailed session information:**

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

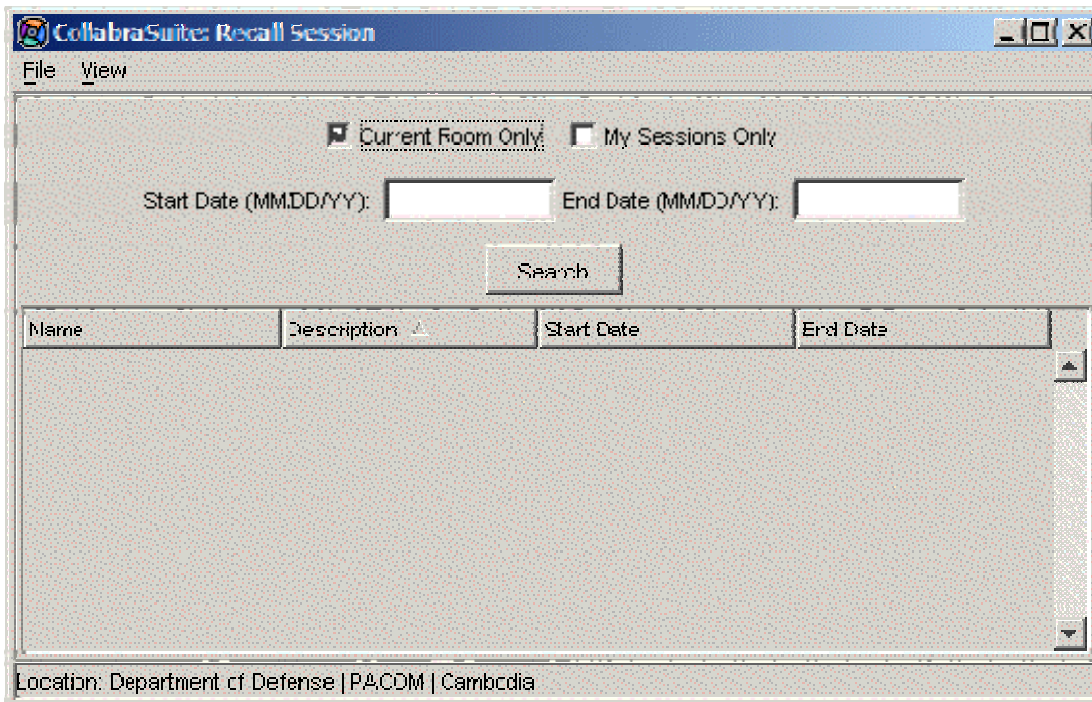
## Recall Chat Session Information

Each session is automatically saved once all users have exited the room and may be recalled. Chat sessions are saved using the default information including the room, start date and time, and end date and time. More detailed information, including a session name and description, may have been added.

### To recall a closed chat session:

1. Open the Chat window.
2. Right-click in the Chat Messages field.
3. Select Recall Session. The Recall Session window will appear.

**Figure 8: Recall Chat Session**



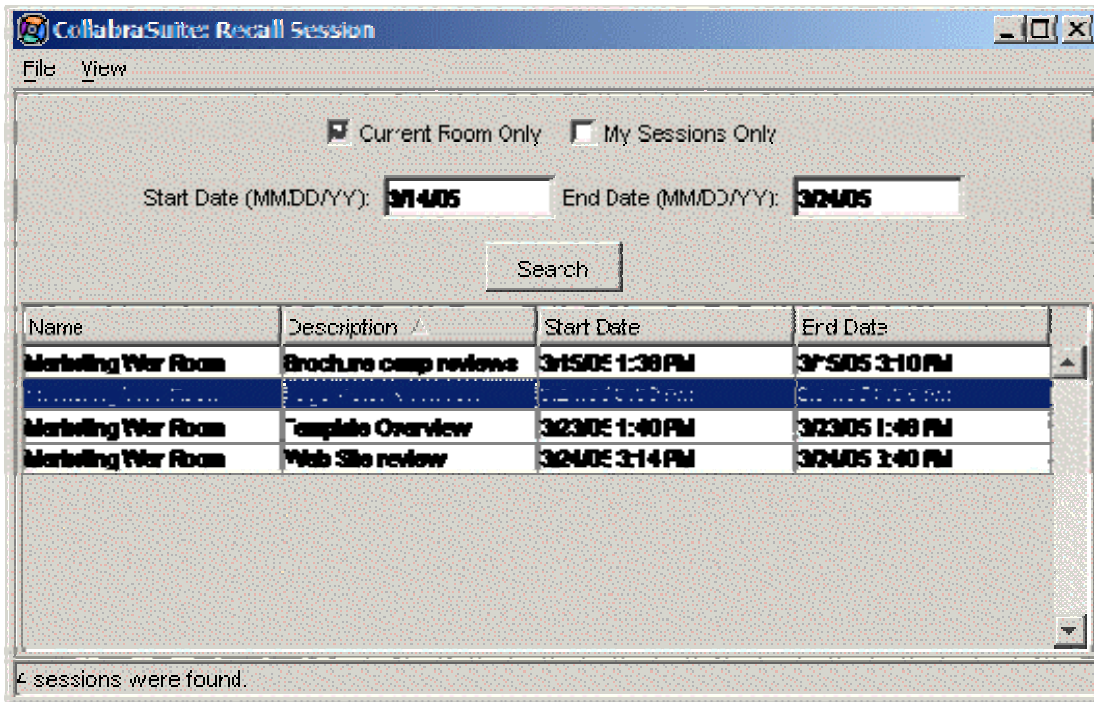
4. Select your search criteria from the following options: Current Room, My Sessions Only, Start Date, and End Date.

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

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



**Figure 9: Recall Session Results**



6. Double-click on the field with the desired session to open that session in a new chat window.  
**Note:** Recalled sessions are read-only. Users can not post new chat messages to these sessions.



## Locking and Unlocking Rooms

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

### To lock a room:

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

**Or**

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

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

### To unlock a room:

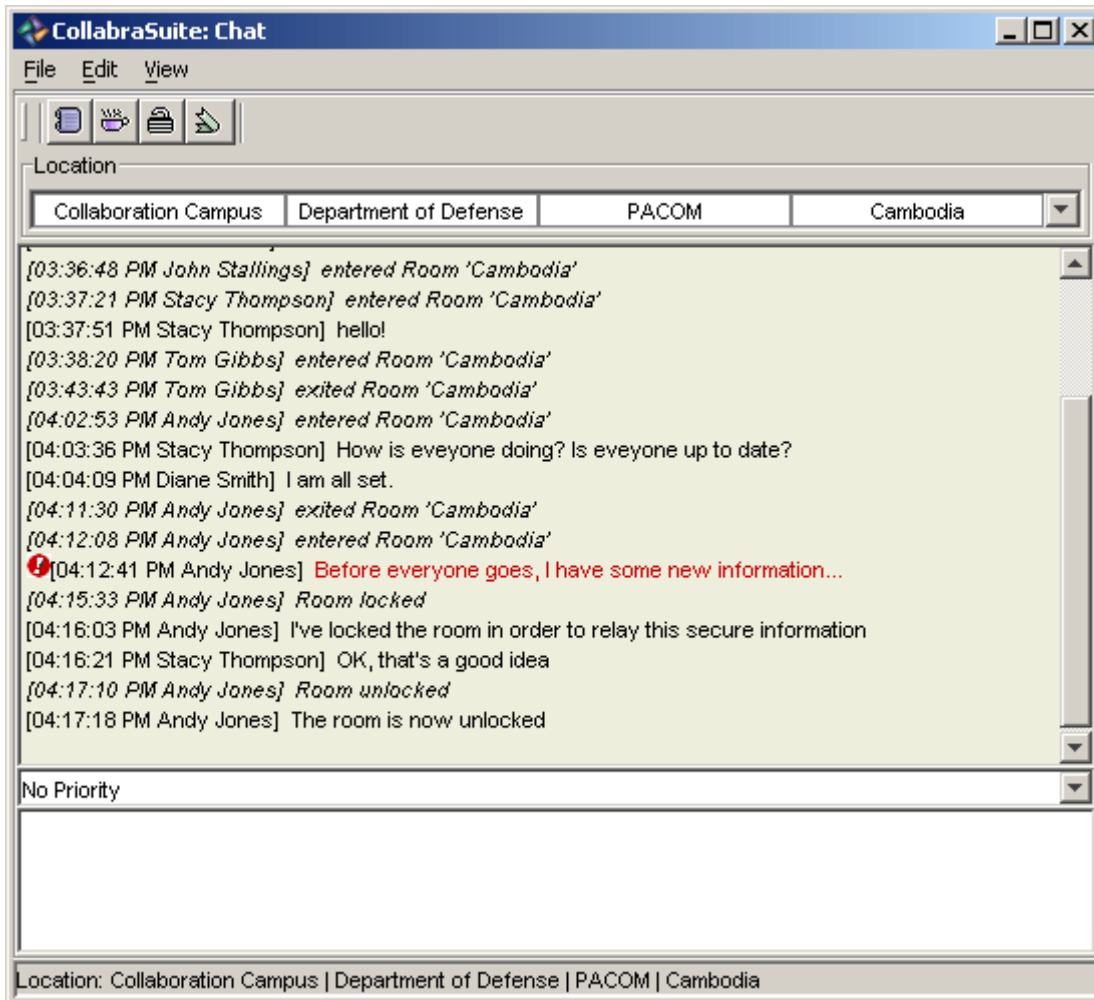
- Select the **Lock Room icon**  again

**Or**

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

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


**Figure 10: Lock Room**



## Manual Scrolling

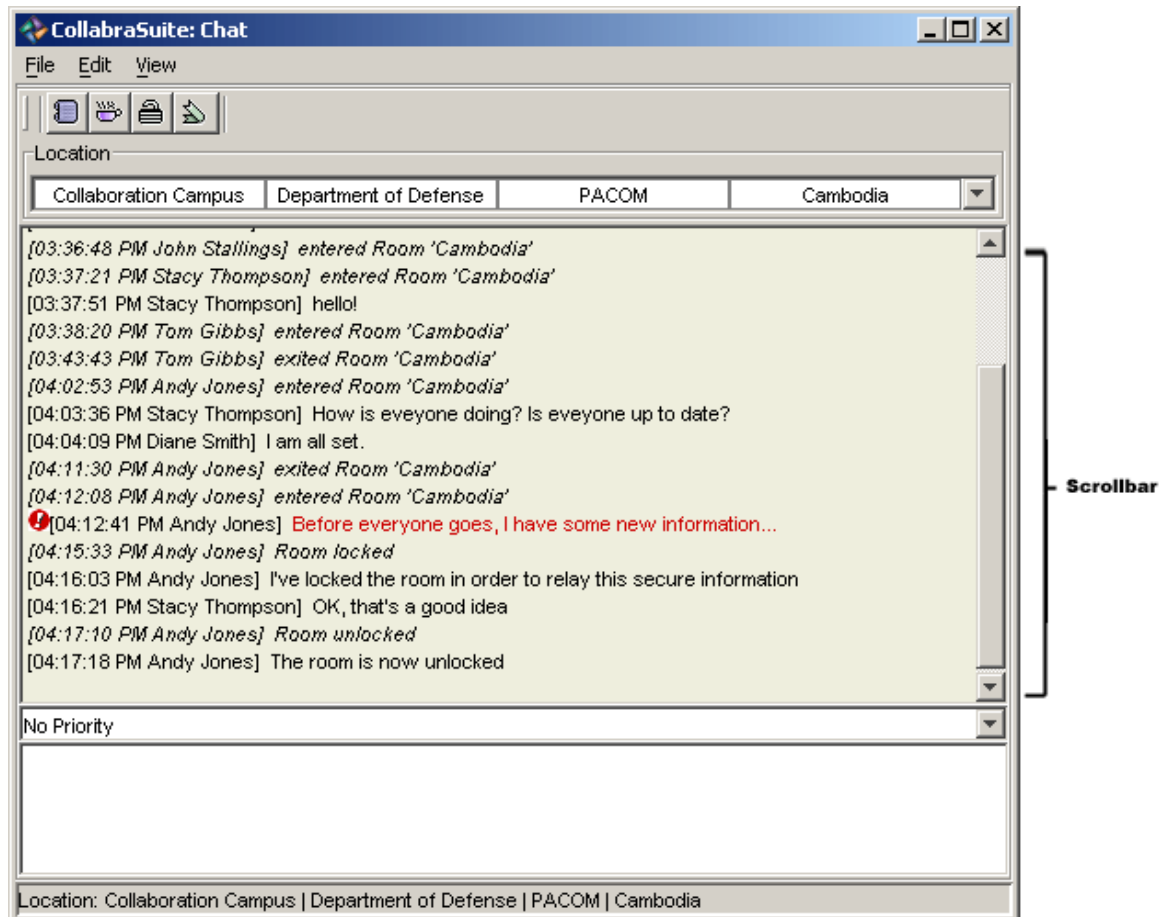
The chat message field scrolls as new entries are added by room occupants. In a public chat with many users, this can scroll quickly. Manual scrolling enables you to control scrolling and read each entry at your own convenience. This also allows users to review discussions held prior to entering the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

### To enable manual scrolling:


- Select the **Manual Scrolling icon**  from the toolbar.
- **Or**
- Right-click in the Chat Messages field to access the context menu and select **Manual Scrolling**.
- **Or**
- Move the scroll bar up to view previous chat messages.

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

**Figure 11: Manual Scrolling**



**To disable manual scrolling:**

- Select the **Manual Scrolling icon**  again from the toolbar.  
**Or**
- Right-click in the Chat Messages field to access the context menu and select **Manual Scrolling**.  
**Or**
- Move the scroll bar to the bottom to view the latest chat messages.

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

## **Idle**

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

### **To change status to idle:**

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

**Or**

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

Your idle message will display with your Time/Name stamp in the Chat Messages field.

### **To change status to active:**

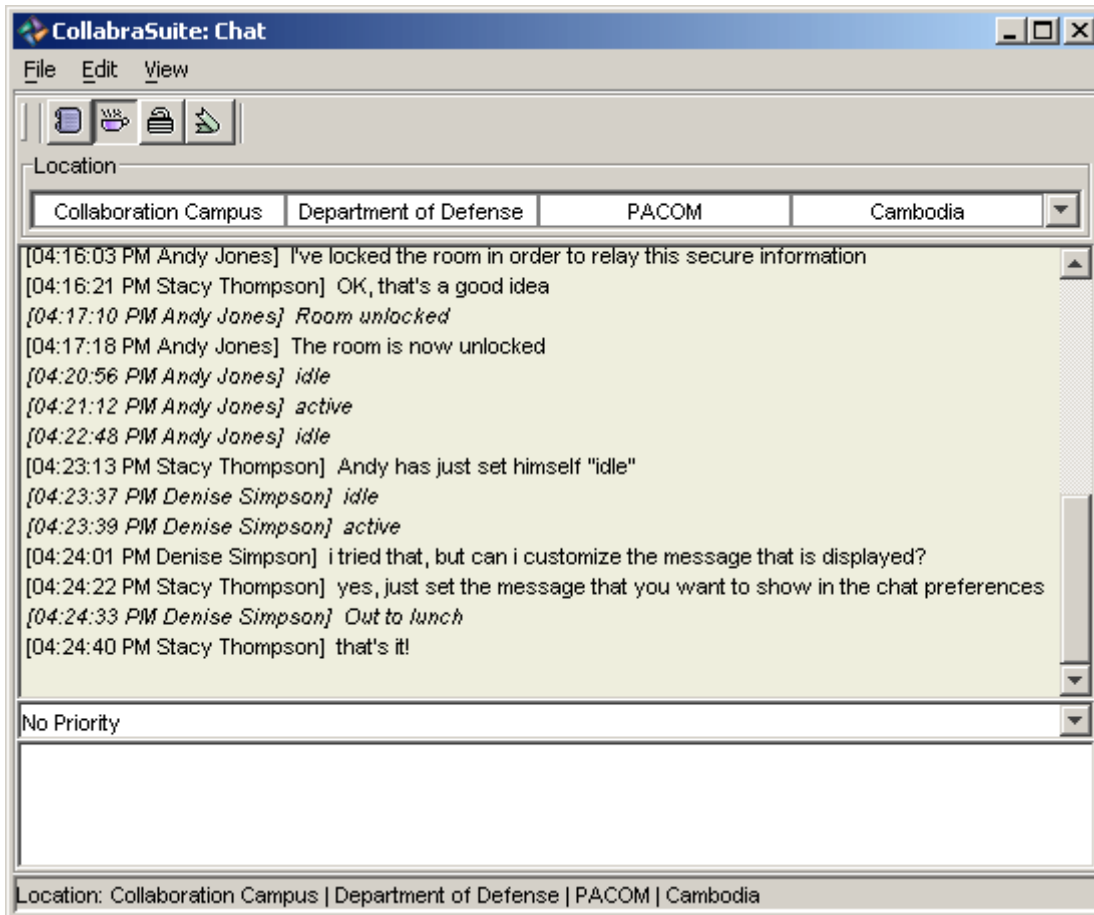
- Select the **Idle icon**  again from the toolbar.

**Or**

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

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


Figure 12: Idle



## Mark Current Chat Messages

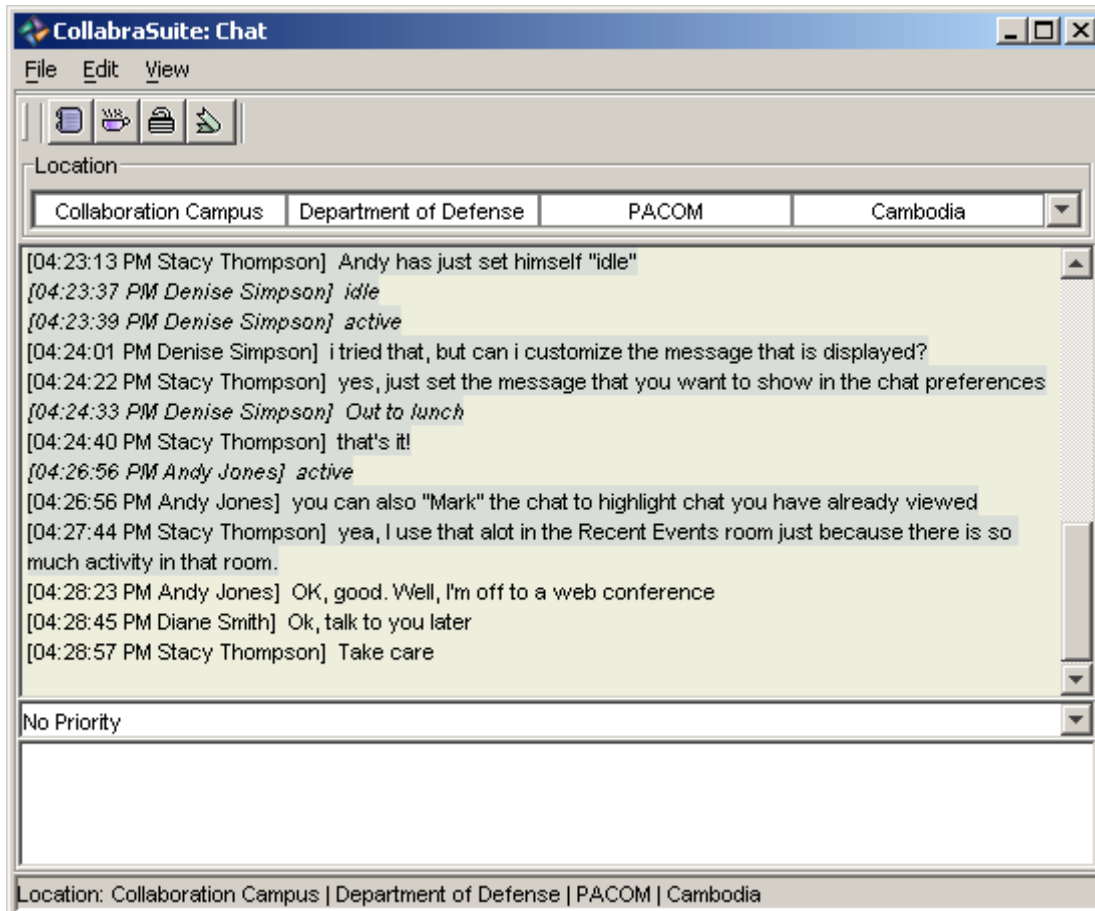
Chat messages may get lengthy with multiple users contributing at a rapid pace. To easily keep track of what you had read and pick up on the most recent room messages, you can highlight all messages currently displayed in the chat messages field.

### To mark current chat messages:

- Select the **Mark Chat Messages icon**  from the toolbar.
- **Or**
- Right-click in the Chat Messages field to access the context menu and select **Mark Current Chat Messages**.

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

**Figure 13: Mark Chat Messages**



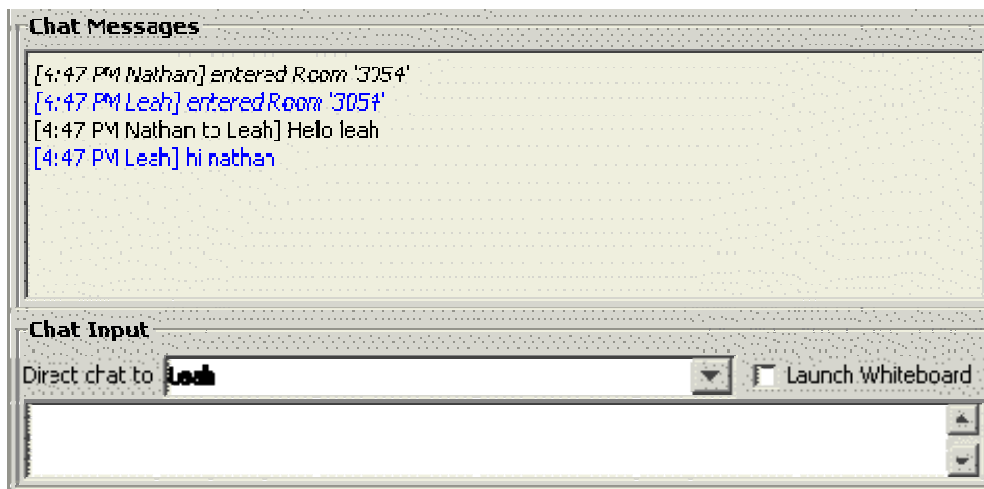
## ***Directed Chat***

CollabraSuite directed chat capabilities provide a way for users to direct their chat messages to specific users during a public chat session. Users can also [push a URL](#) or [launch a whiteboard](#) to other users through the directed chat feature.

### **To send a directed chat:**

1. Select the intended recipient from the "**Direct Chat to**" pull down menu located above the Chat Input field.
2. Type the message you wish to send and press the **enter key**.

The message will display in the chat window with the time/sender, user name/recipient stamp.





## ***Push URL***

The Push URL feature in the Directed Chat section of the room text chat is used to send a URL to a selected user. Rather than just sending a link, pushing a URL opens a new browser window on the recipient's desktop displaying the provided URL.

### **To push a URL to a user within the room:**

1. Enter a URL (web address) in the **URL field**.
2. Press the enter key.
3. Select a recipient from the "Direct Chat to" pull-down menu.
4. Add a chat message to introduce the web page to the recipient in the Chat Input field.
5. Press the enter key.

A web browser with the URL entered launches on the recipient's desktop.

## ***Launch Whiteboard***

The [Whiteboard](#) allows users to view a canvas that may contain graphics, text, and freehand images. The Launch Whiteboard feature is used to push the whiteboard to other users through the [Directed Chat](#) feature.

### **To push a whiteboard to a user within the room:**

1. Select the **Launch Whiteboard check box** located next to the "Direct chat to" pull-down menu inside the Chat Input field.
2. Select a recipient from the "Direct chat to" pull-down menu.
3. Enter a message in the **Chat Input text field** to introduce the whiteboard.
4. Press the **enter key**.

A whiteboard launches on the recipient's desktop displaying the contents of the current canvas.

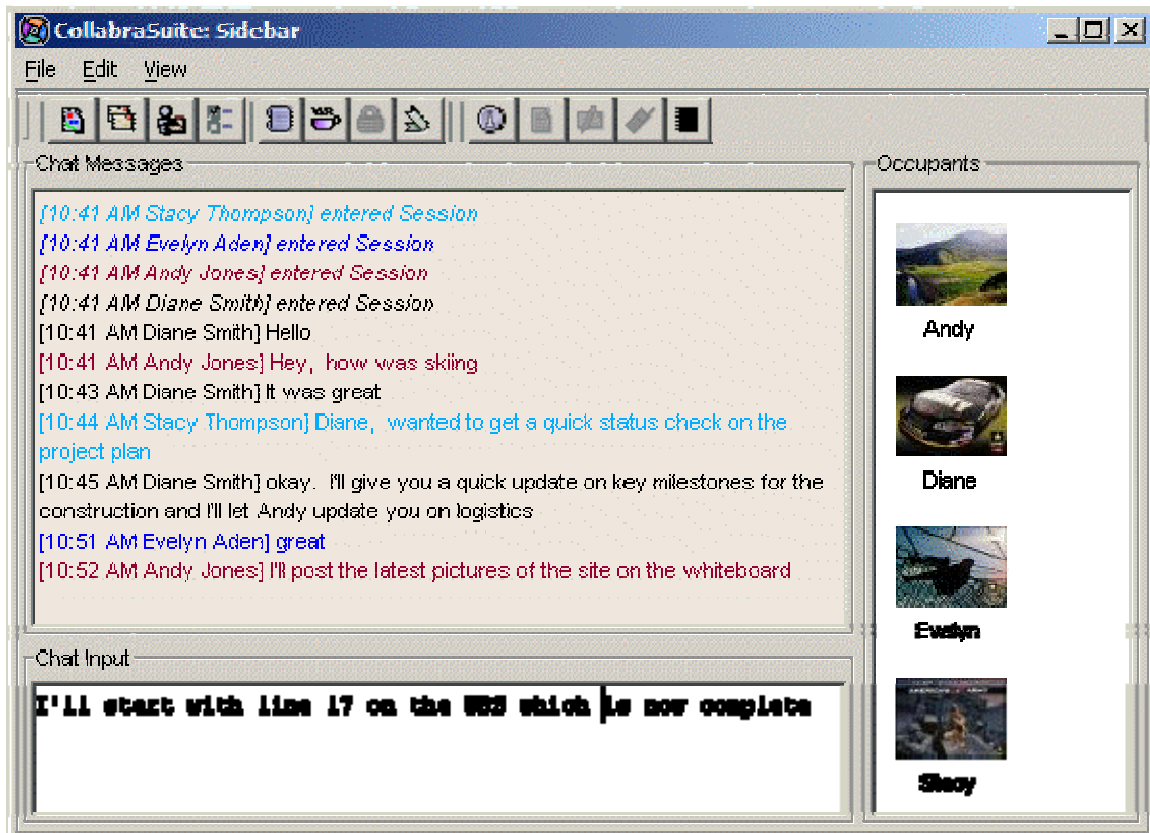
## Sidebar Session

Sidebar chats provide the capability to send instant messages to a set of selected users in real-time using the CollabraSuite text chat component separately from the public room chat. Sidebar sessions may include users within a current room or users anywhere in the CollabraSuite environment. Idle users may not be included in a sidebar. Additionally, the sidebar can include a [whiteboard](#) session viewable only to those in the session. The sidebar session can be later [recalled](#) just like room sessions.

### To initiate a Sidebar Chat:

1. Select one or more users from lists provided by components such as the [Online Users](#) component, [Room Occupants](#) component or the [Skill Search](#) component.
2. Right-click to display the context menu and select **Sidebar**. The Sidebar Chat window will display, including the selected users.
3. Begin the text chat session by typing text in the **Chat Input** area of the window and pressing the **enter** key.

**Figure 14: Sidebar Chat**



### **To end a Sidebar Chat:**

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

### ***Pages***

The CollabraSuite Paging component enables users to collaborate using a lightweight instant email to both online and off-line users. The paging feature is also used to report document and folder changes to [Document Subscribers](#).

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

Users can choose to have pages forwarded to their email account whenever they are off-line. Preference can be set in the [User Information](#) component.

## View a Page

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

### To access the Page Viewer window:


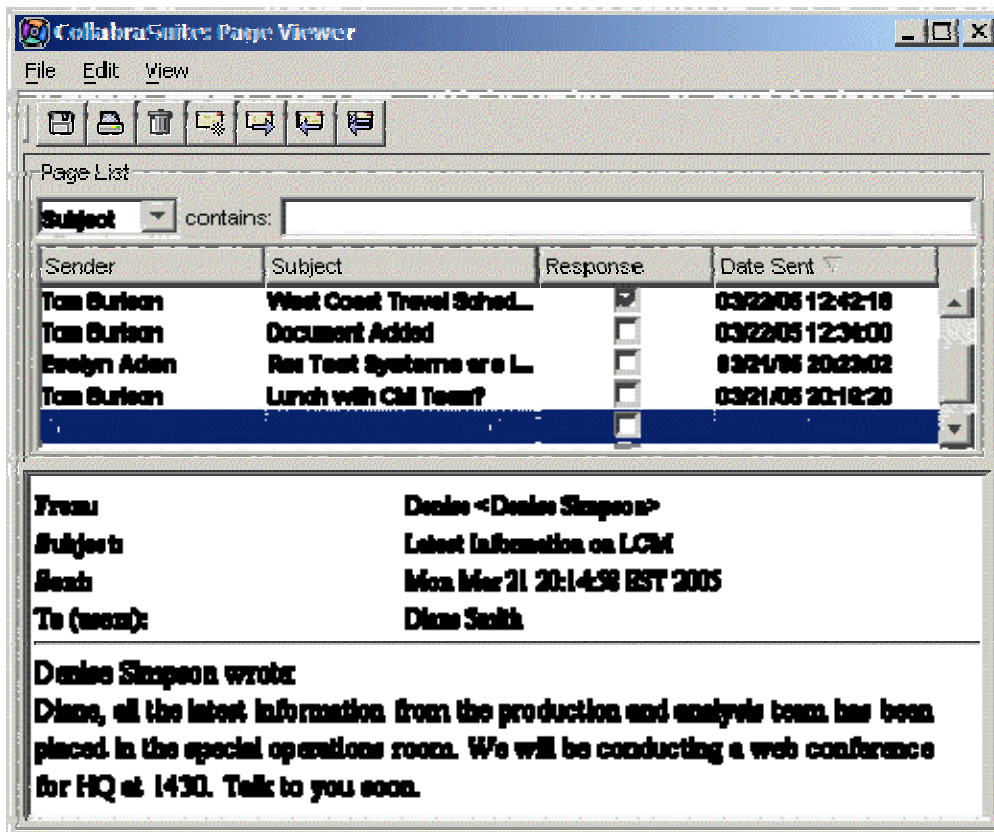
- Select the **Page Viewer icon**  from the toolbar. The Page View window will display.

Figure 15: Page Viewer



### To sort pages by column header:

1. Select a column header—**Sender**, **Subject**, **Response**, or **Date Sent**. The list of pages will be sorted in ascending order according to the selected column.
2. To sort the list in descending order, select the same column header again.
3. To sort by another column, simply select the appropriate column header.

**To filter pages by search word or category:**

1. Select a category from the pull-down list: sender, subject, response, or date sent.
2. Type a search word in the **"contains" text field**.
3. The Page List will be filtered according to the sender, subject, response, or dates that match your query.

## Sending a Page

Users may send pages to one user, several users, or groups using the Page Composer component. The Page Composer component may be accessed through the toolbar, the [Page Viewer](#) window, or by right-clicking users to access the context menu.

### To send a page:



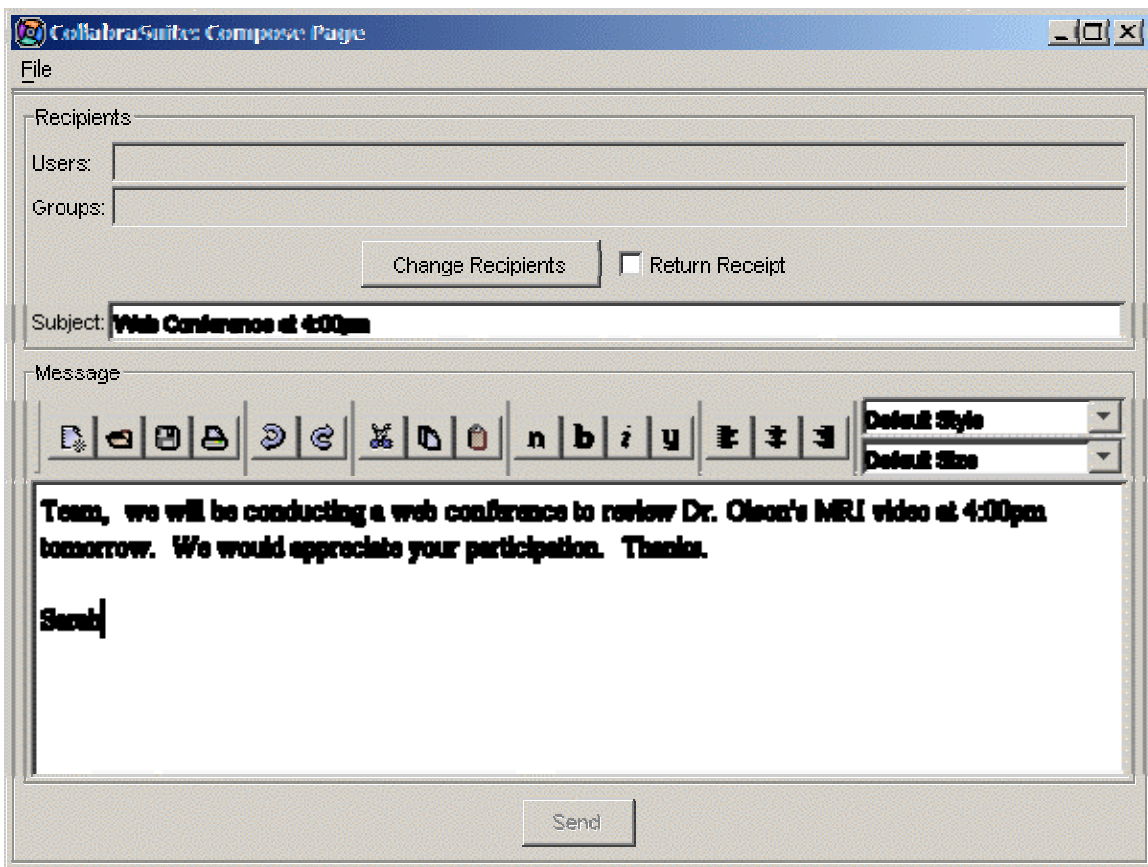
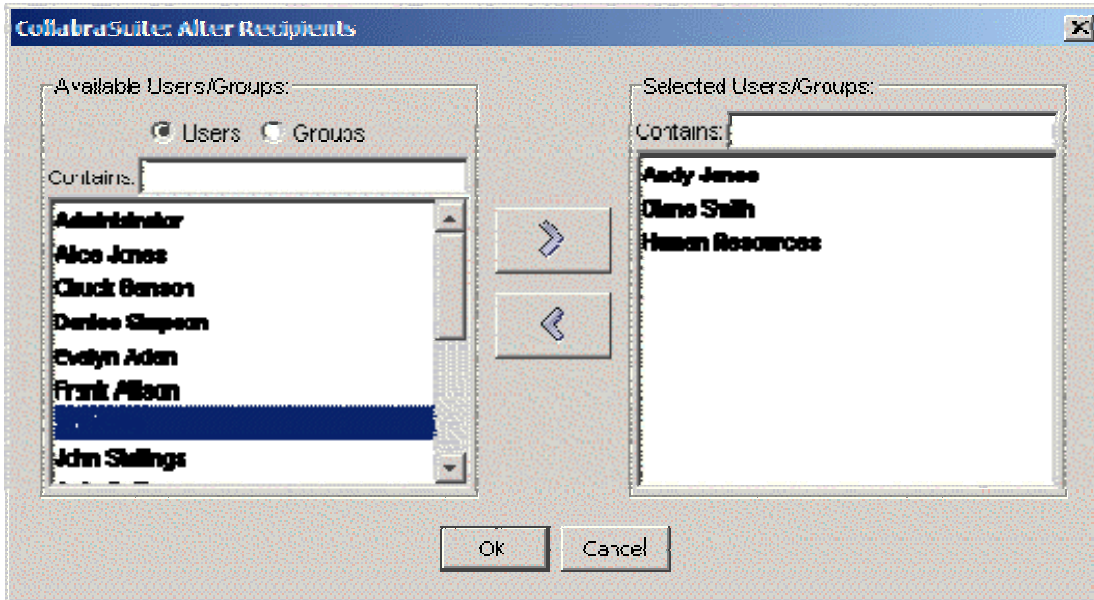
1. Select the **Send Page icon**  from the toolbar or the context menu, or select the **Compose Page icon**  from the Page Viewer toolbar. The Page Composer will display.

Figure 16: Compose Page



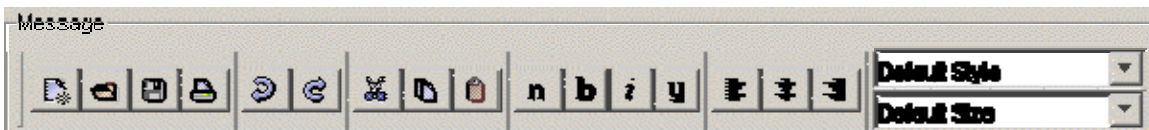
2. Click the **Edit Recipients button** to modify the recipients for the page. The Alter Recipients window will display.

**Figure 17: Alter Recipients**




3. Highlight the users and groups you wish to page in the **Available Users/Groups list**.
4. Click the right arrow button to move the selected user or group to the Selected Users/Groups field.
5. Click **OK** to close the Alter Recipients window. The recipients will now show in the Recipients field.
6. Select the **Return Receipt option** to receive a notification when the recipient(s) select the page in the Page Viewer window.
7. Type the subject of the page in the **Subject text field**.
8. Type the message in the **Message field** and use the toolbar options to change font size, font type, and text alignment as desired.

**Figure 18: Message Toolbar**



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


**To reply to a page:**

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




3. Type an appropriate message and send the page.

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

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

**To forward a page to another user or group:**

1. Select a page from the list of received pages.
2. Select the **Forward Page icon** . The Page Composer window will display with the text from the received page displayed.
3. Add an additional message if desired and send the page.

## Whiteboard

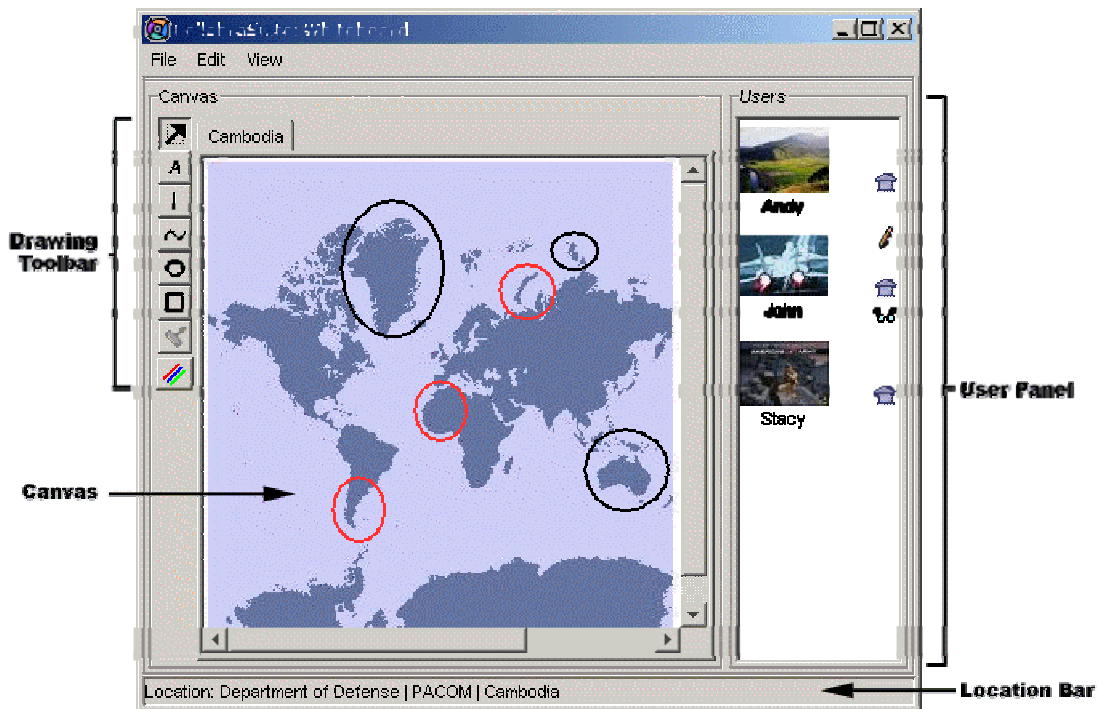
The CollabraSuite Whiteboard component is a multi-user interactive tool that allows users to review, create, and update graphic information in real-time. Presence awareness mechanisms make it possible to differentiate participants and their annotations. Additionally, visual displays indicate the level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

### To access the whiteboard:

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

The Whiteboard window will display.

**Figure 19: Whiteboard**



## ***Whiteboard Backgrounds***

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

### **To add or change your background:**

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

### **To clear the existing background:**

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

## ***Whiteboard Annotations***

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

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



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



The **text** tool creates a text line in the whiteboard.



The **line** tool creates straight lines.



The **freehand** tool creates drawn lines in any shape.



The **ellipse** tool creates any size or shape of ellipse.



The **rectangle** tool creates any size or shape of rectangle.



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



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

## ***Whiteboard Tabs***

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

### **To add a new tab:**

- Select View > Tab > Add tab.

### **To clear a tab:**

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

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

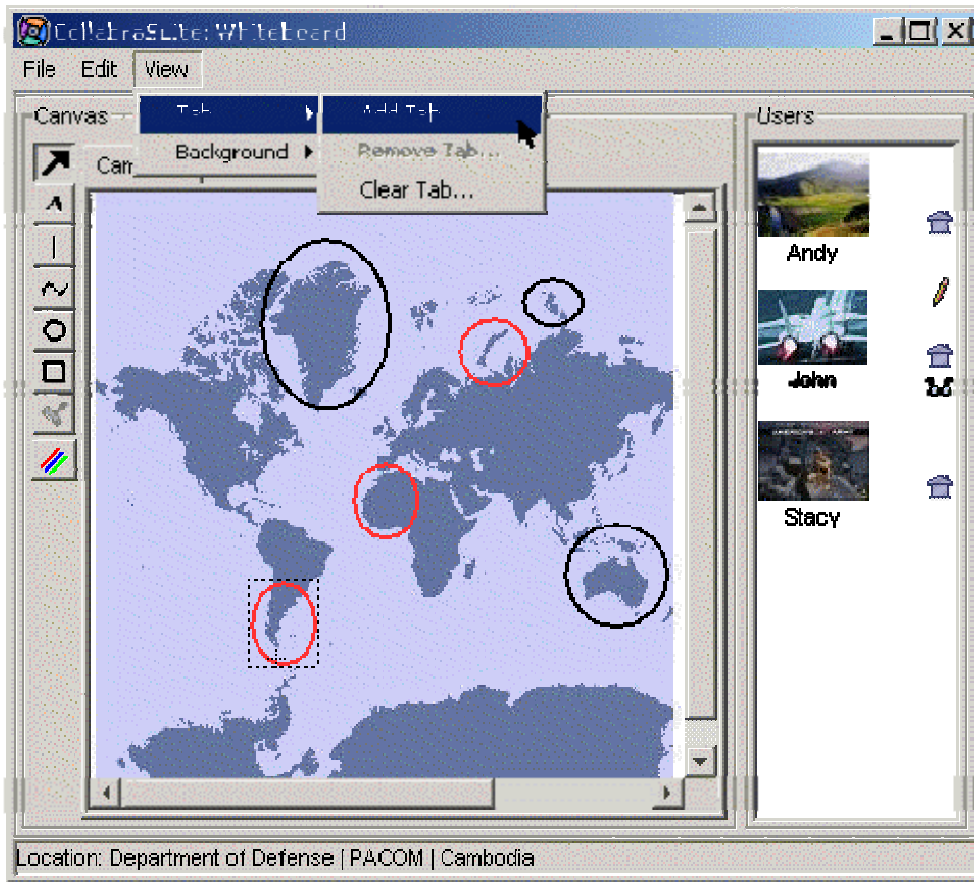
### **To remove a tab from a session:**

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

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

**Note:** see [\*clear session\*](#) to delete an entire session whiteboard


**Figure 20: Whiteboard Tab**



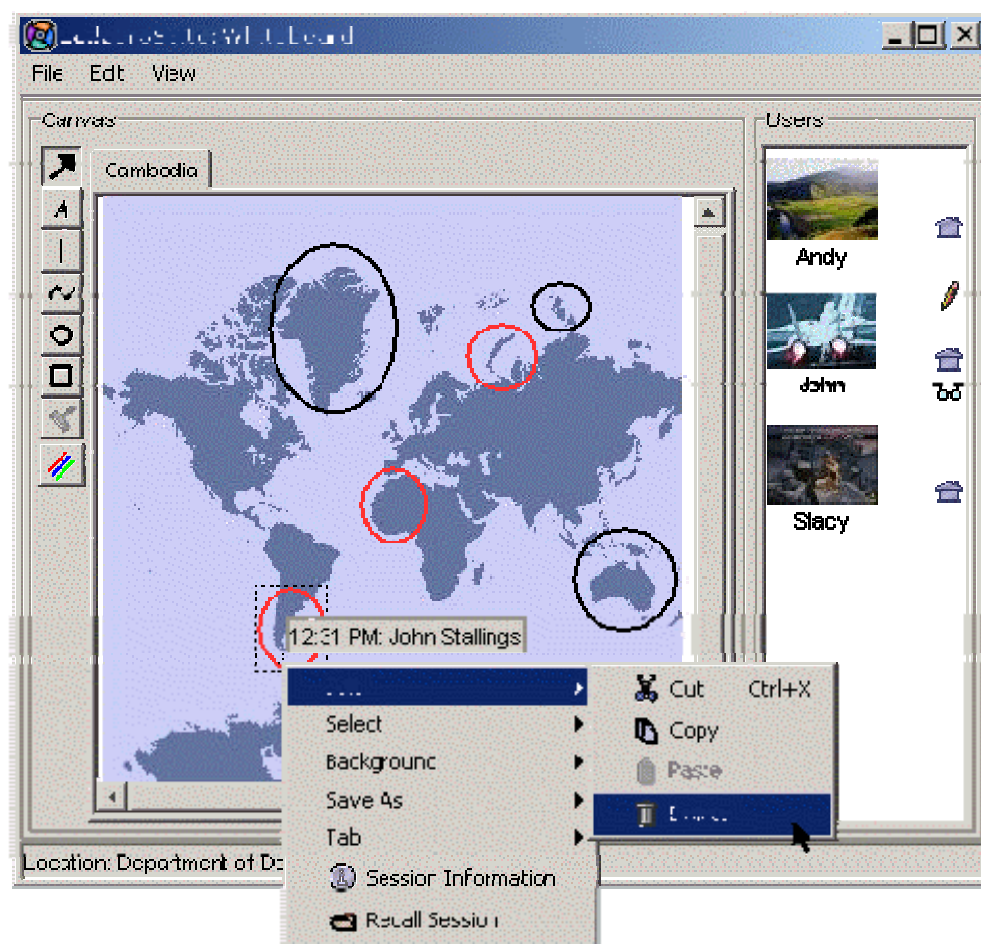
## Edit a Whiteboard Canvas

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

### To delete an item from the canvas:

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

**Figure 21: Whiteboard Items**



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

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

**To select multiple items on a whiteboard:**

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

**To un-selected items:**

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

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

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





**To select all items on a whiteboard at once:**

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



## ***View Whiteboard Users***

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

-  Annotation icon: User has made annotations to the canvas. (To view specific annotations by user, roll your mouse over the canvas.)
-  View icon: User is currently in the same room and viewing the Whiteboard.
-  Room icon: User is currently in the same room.
-  Online icon: User is currently online.

## ***Save Whiteboard Session Information***

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

### **To assign more detailed session information:**

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

## ***Clear a Whiteboard Session***

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

### **To clear the contents of the whiteboard:**

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

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

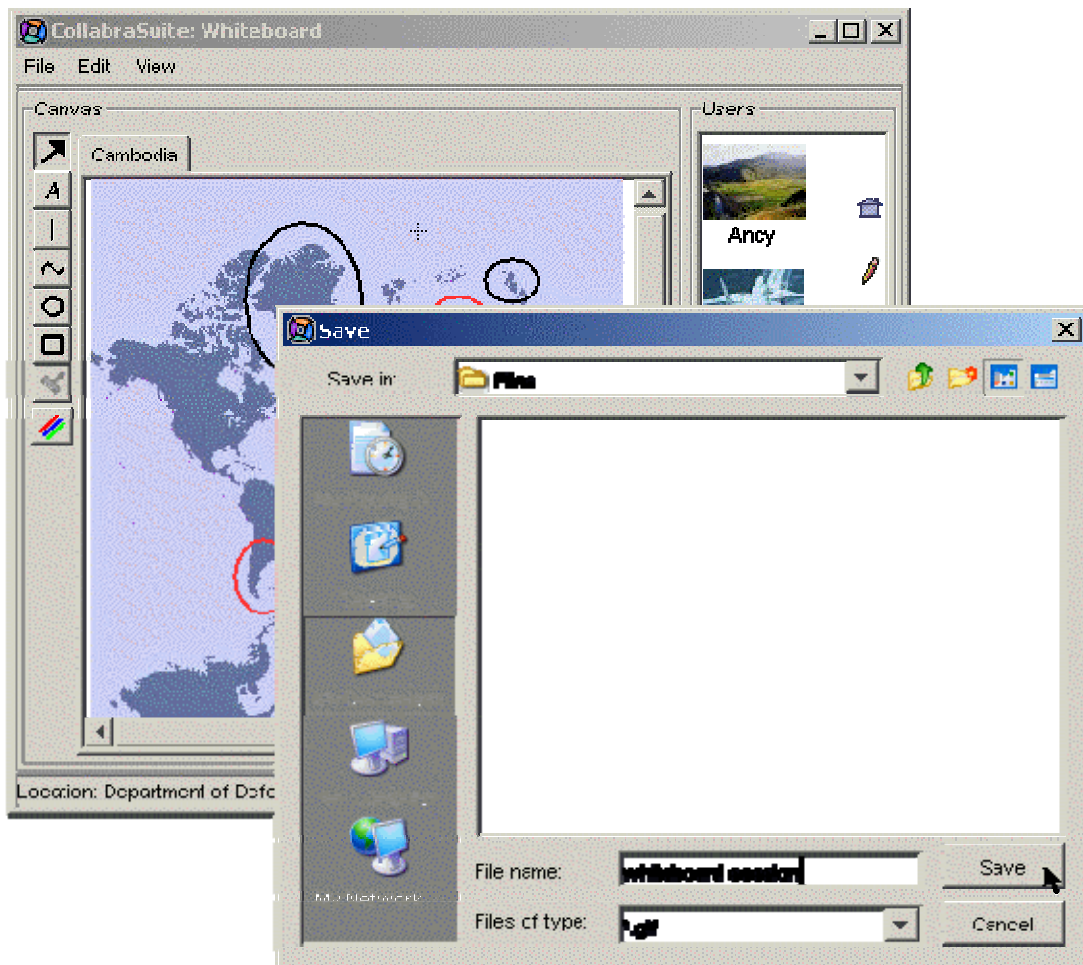
## Save a Whiteboard as an Image

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

### To save and export a whiteboard as an image:

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

**Figure 22: Save Whiteboard**




2. Enter a file name and select a location for the file to be saved.
3. Click **Save**.

**Note:** Once saved, a whiteboard image can be retrieved and used as a background in a new whiteboard using the [Change Background](#) feature.

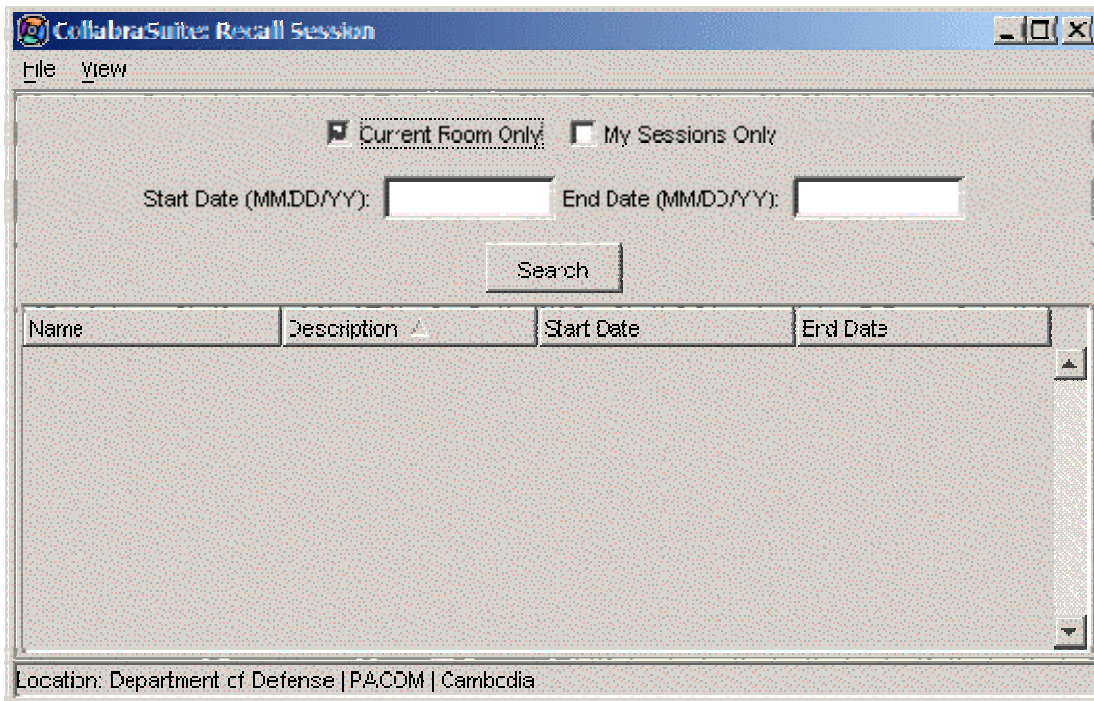
## Recall Whiteboard Session Information

When a Whiteboard session is closed, it is saved. All sessions are saved by time and date, but additional information may have been added by users at the time of the session. When a whiteboard session is recalled, users will see the state of the whiteboard at the end of the session.

### To recall a closed Whiteboard session:

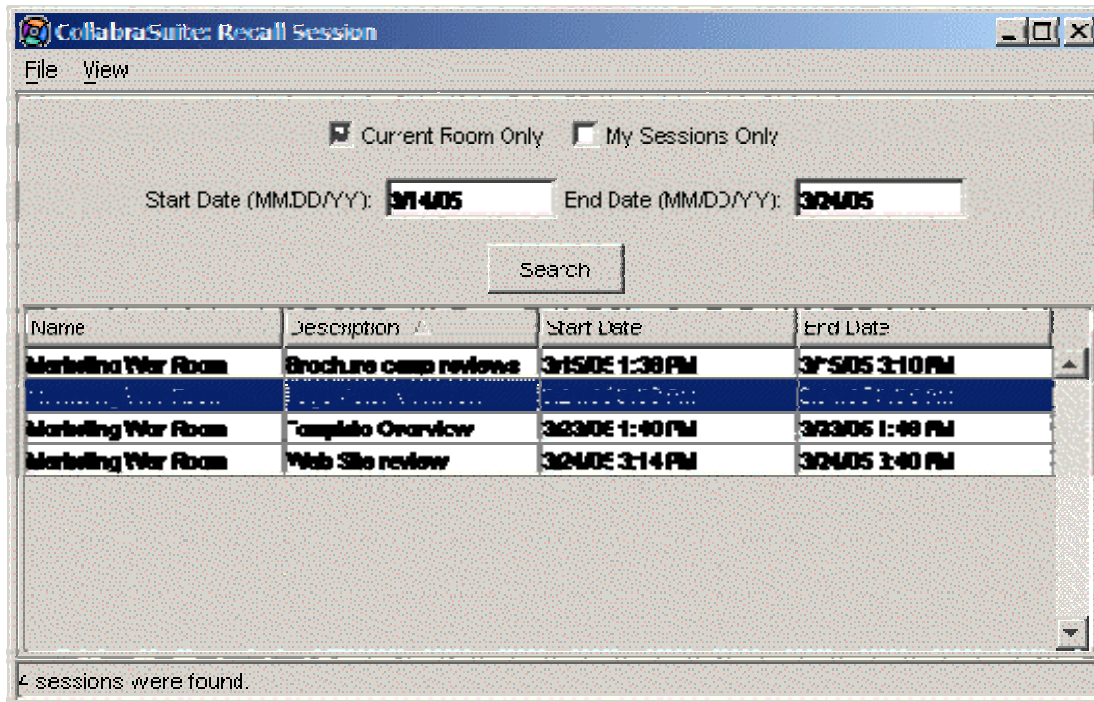
1. Select the **Whiteboard icon**  from the toolbar.
2. Right-click in the canvas and select **Recall Whiteboard Session**. The Recall Session window will appear.

**Figure 23: Recall Whiteboard Session**



3. Select your search criteria from the following options: Current Room Only, My Sessions Only, Start Date, and End Date.
4. *Note: you can use as many or as few search criteria as desired.*
5. Click **Search**. A list of sessions based on your criteria will display.

Figure 24: Recall Whiteboard Session Results



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

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

## Media



### *Media Overview*

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

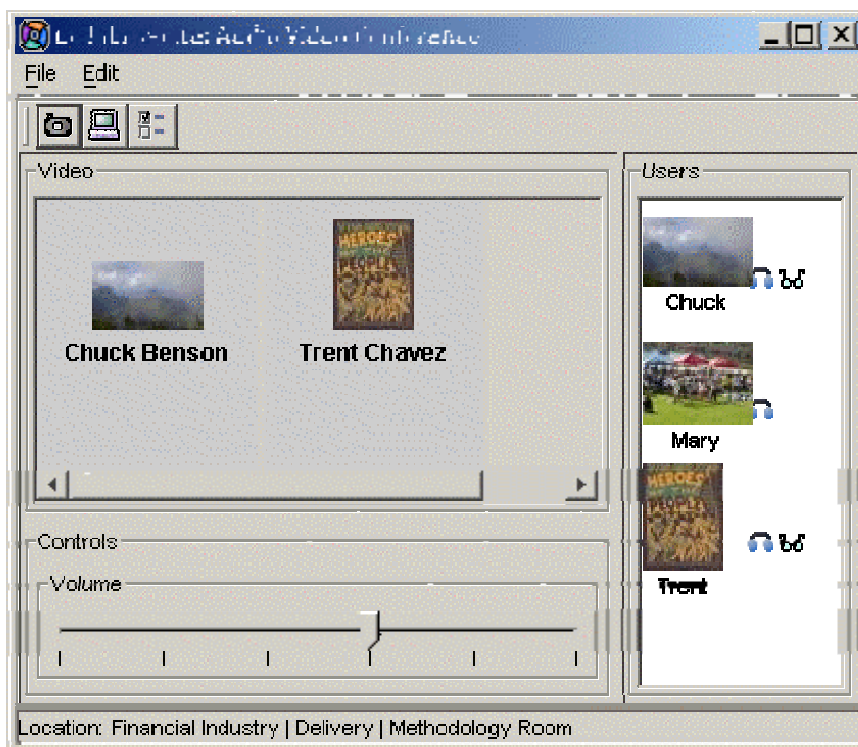
## Configuring Capture Devices

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

### To access the Media Device Configuration window:

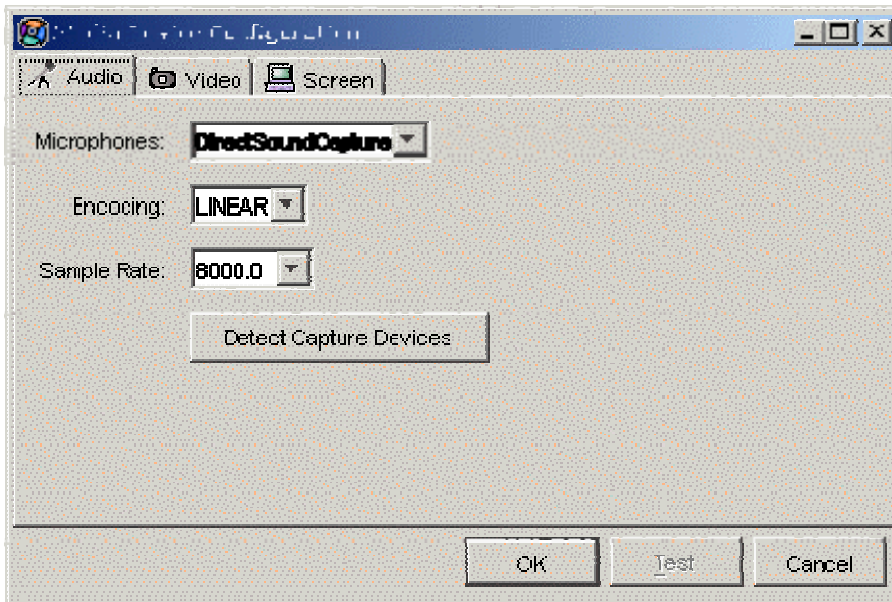
1. Select the **Audio Conference icon**  or the **Audio/Video Conference icon**  from the toolbar. The Audio Video Conference window will display.

**Figure 25: Audio/Video Conference**



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

**Figure 26: Media Device Configuration**





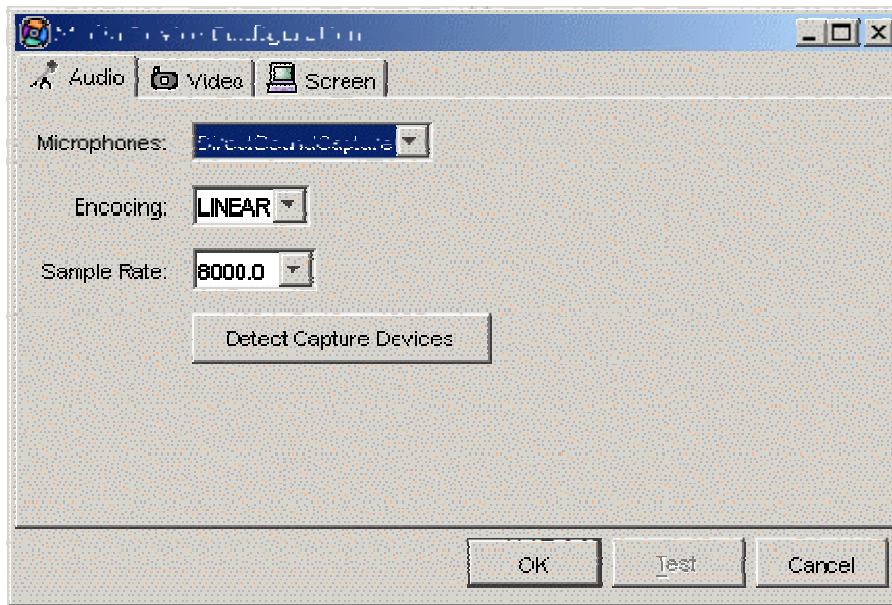
## Audio Capture Configuration

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

### To configure audio capture devices:

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

**Figure 27: Audio Device Configuration**



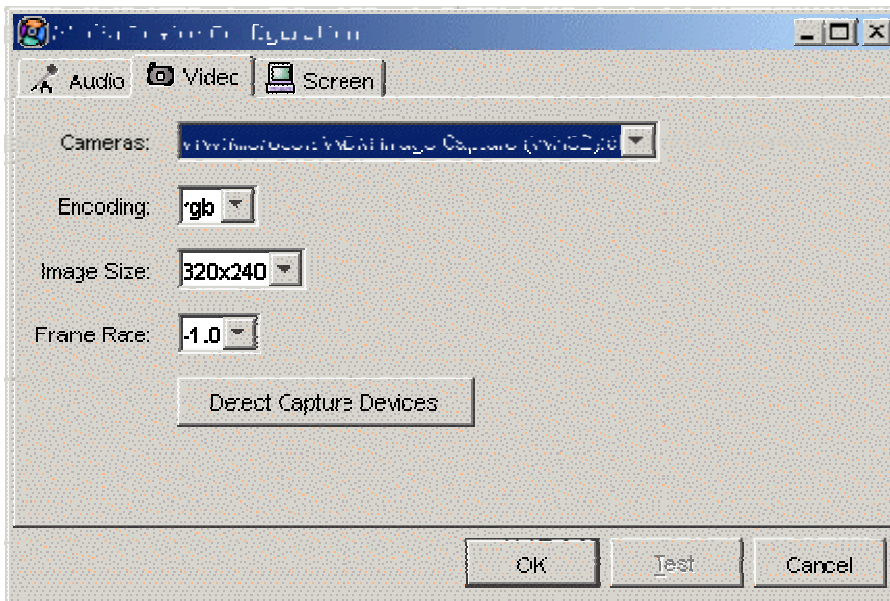
## Video Capture Configuration

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

### To configure video capture devices:

1. Select the **Video tab** on the Media Device Configuration window.
2. Click **Detect Capture Devices**. The Cameras, Encoding Image Size, and Frame Rate pull down menus will auto populate with the appropriate values for the detected cameras.  
**Note:** Depending on the speed of your computer this may take several minutes to complete.
3. Select the camera currently connected to the computer from the "**Cameras**" pull down menu.
4. Select the appropriate image size from the Image Size pull down menu.  
**Note:** To minimize the resources used by the computer and network bandwidth, select the smallest image size that provides enough detail for the recipients. It is best to choose the smallest image and then increase the value if necessary.
5. Click **OK** on the Media Device Configuration window to complete the configuration process.

**Figure 28: Video Device Configuration**



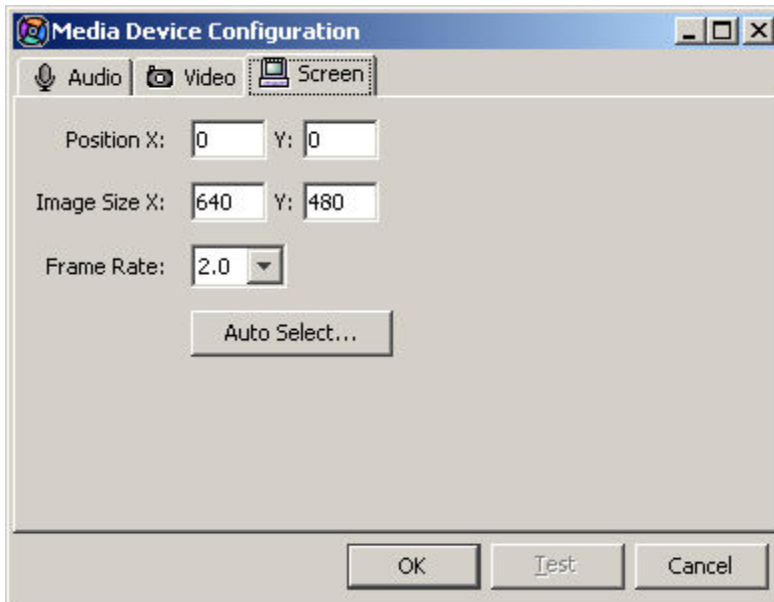
## Desktop Sharing Configuration

In the Media Device Configuration window, users may configure desktop sharing. See [Configuring Capture Devices](#) to access the Media Device Configuration window.

### To configure desktop sharing:

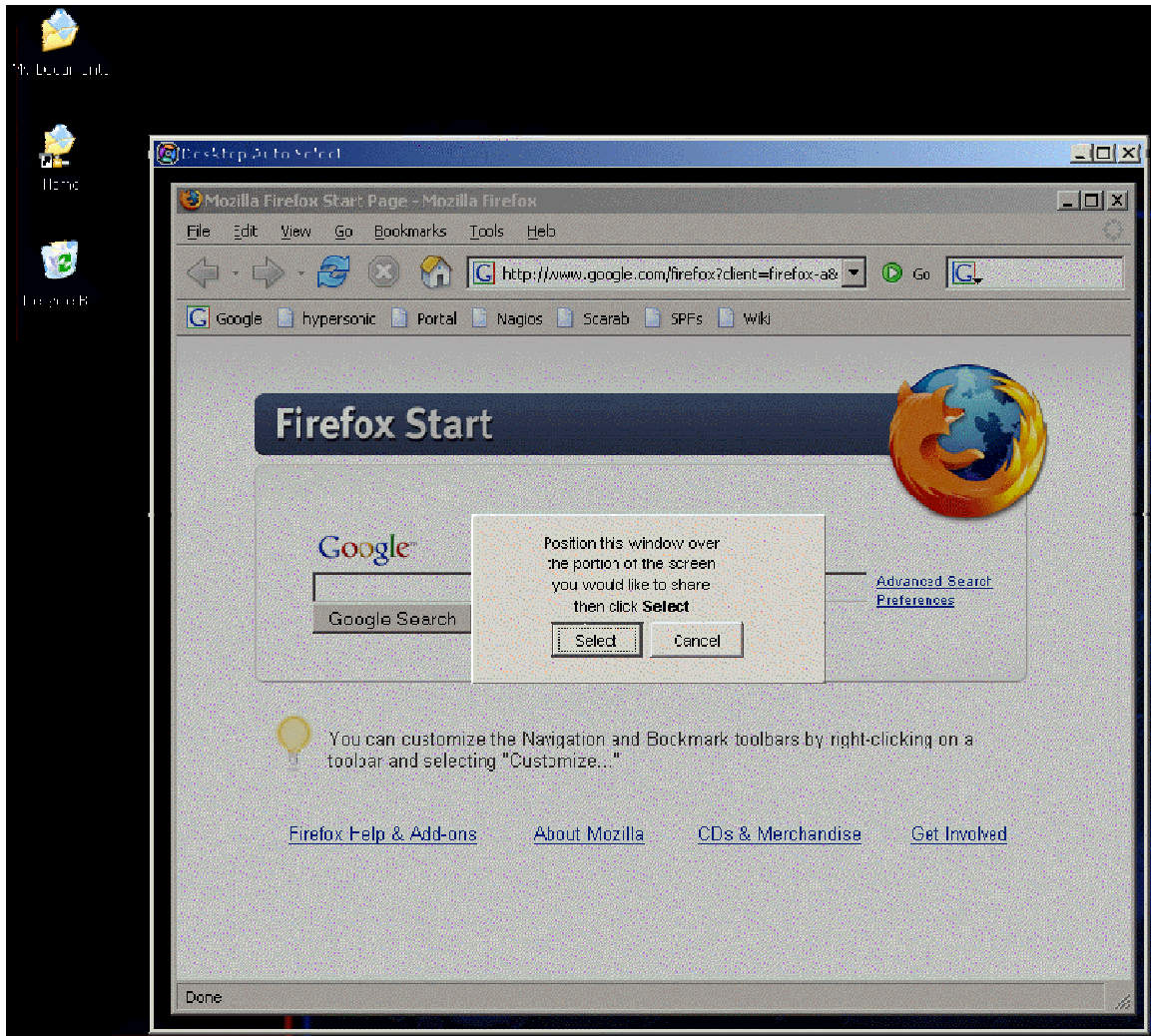
1. Click **Auto Select** on the Media Device Configuration window. The Desktop Auto Select window will appear.

**Figure 29: Screen Device Configuration**



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

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

**Figure 30: Select Desktop**

3. Resize the Desktop Auto Select window to the size of the section of screen to display.
4. Click **Select** to use the defined region. The Position X, & Y and Image Size X & Y values will be updated according to the region selected in steps three and four.
5. Adjust the frame rate by selecting values in the Frame Rate pull down menu.
 

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

## Audio Conferencing

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


### To enter an audio conference session:

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

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

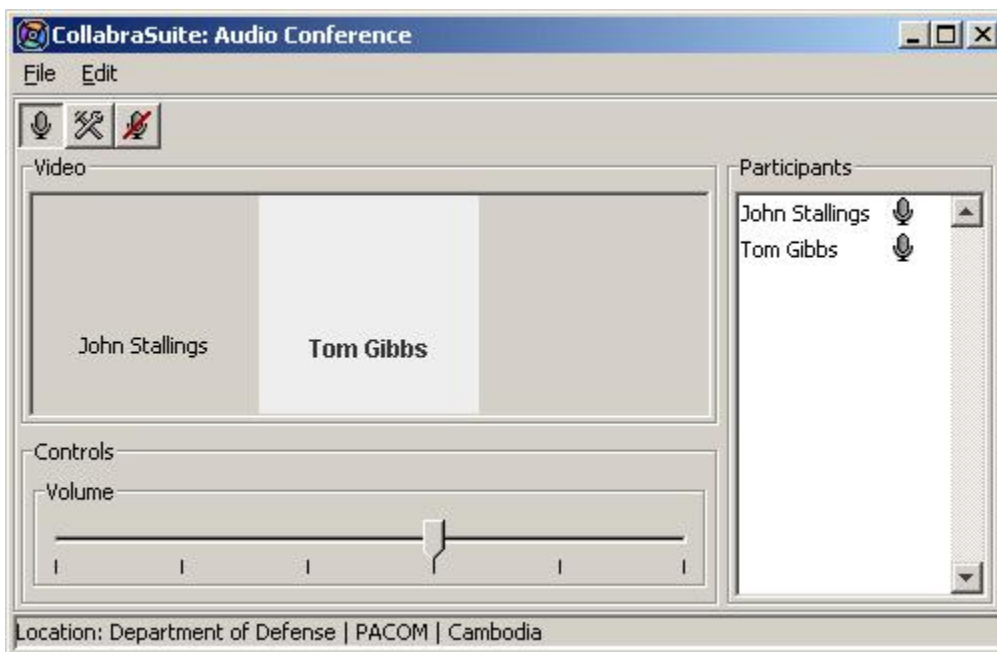
**Note:** If your microphone has not been configured for use with the CollabraSuite application, follow the instructions for configuring the microphone in the [Audio Capture Configuration](#) section of this manual.



### To transmit audio to other participants:

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

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

**Figure 31: Audio Conference**





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

**To adjust the volume:**

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

**To mute the transmitted audio:**

- Muting transmission will allow you to listen to the audio broadcast without background noise from your microphone.
- Press the **mute button**  once to stop your audio broadcast.
- Press the **mute button**  again to resume audio broadcasting.

## **Audio/Video Conferencing**

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

### **To enter a room audio/video conference session:**

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


The Audio/Video Conference window will display.


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

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

### **To transmit a video image to participants:**

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


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

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

## Phone

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

### To initiate an audio phone session:


1. Select one user from either the [Online Users](#) component or the [Room Occupants](#) component.
2. Right-click to display the context menu and select **Phone** or click the **Phone icon**  on the toolbar.

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

**Figure 32: Initiate Phone Call**



### To accept a phone session:

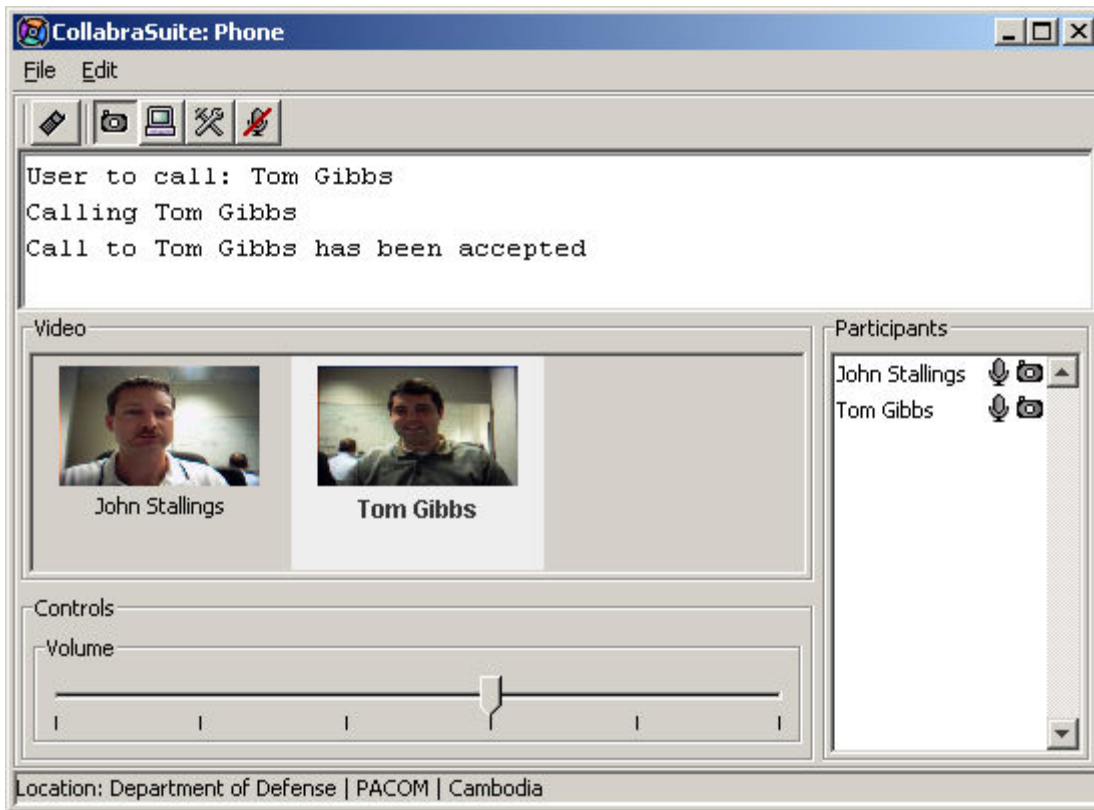
- Select the **Phone icon**  from the toolbar of the Phone Media component.

**Note:** When the recipient accepts the call both users will be placed in the point-to-point audio session and can collaborate privately. The Video pane will remain empty unless the users have




configured their profiles with a user icon. If so, the user's icon will display during the point-to-point audio session.

**Figure 33: Phone Call**



### To end a phone session:

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

## Adding Media to a Phone Session

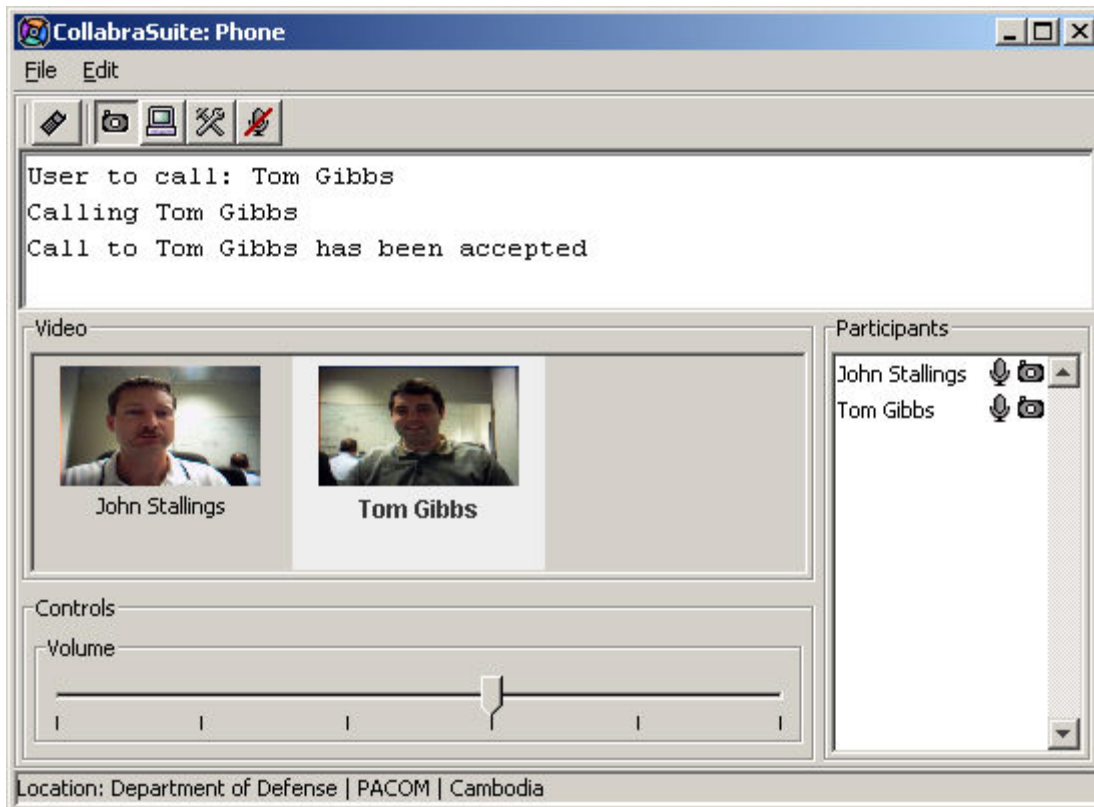
Point-to-Point audio/video conferencing capabilities allow users to add video or desktop sharing to an audio phone session allowing for a more personal collaboration between two users. Users can either be in the same room or two different rooms.

### To add video to a phone session:


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

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

**Figure 34: Video Phone Call**




### To add desktop sharing to a phone session:


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

**Note:** See the [Desktop Sharing](#) section of the manual to learn how to share a region of your desktop.



## Desktop Sharing

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

### To initiate a Desktop Sharing session:

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

**Note:** Detailed instructions on sharing a portion of the screen are described in detailed in the [Desktop Sharing Configuration](#) section of this manual.

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

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

# Document Management

## *Document Overview*

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

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


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

## Document Storage

### Briefcase Documents

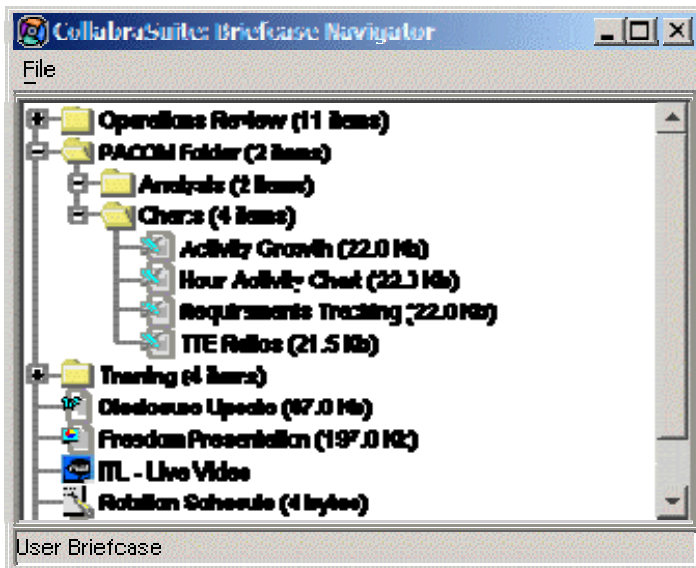
CollabraSuite provides a means to transport and collaborate on critical business data through the use of a private data storage briefcase. The briefcase moves with the user as they traverse the virtual environment, and the contents can only be viewed by the briefcase owner. Briefcase contents can easily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

#### To launch the Briefcase Navigator:

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

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

Figure 35: Briefcase Navigator



## File Cabinet

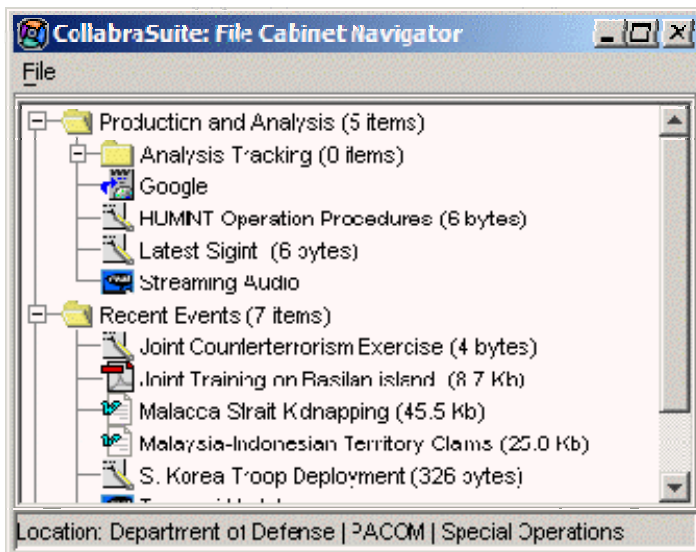
CollabraSuite provides a means to collaborate on critical business data via the room file cabinet data storage. Contents can be [imported](#) from a user's desktop to a room file cabinet to facilitate knowledge sharing. CollabraSuite provides fine grained access control by assigning [read and write privileges](#)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

### To launch the File Cabinet Navigator:

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

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

**Figure 36: File Cabinet Navigator**



## Functions

### Import Documents

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

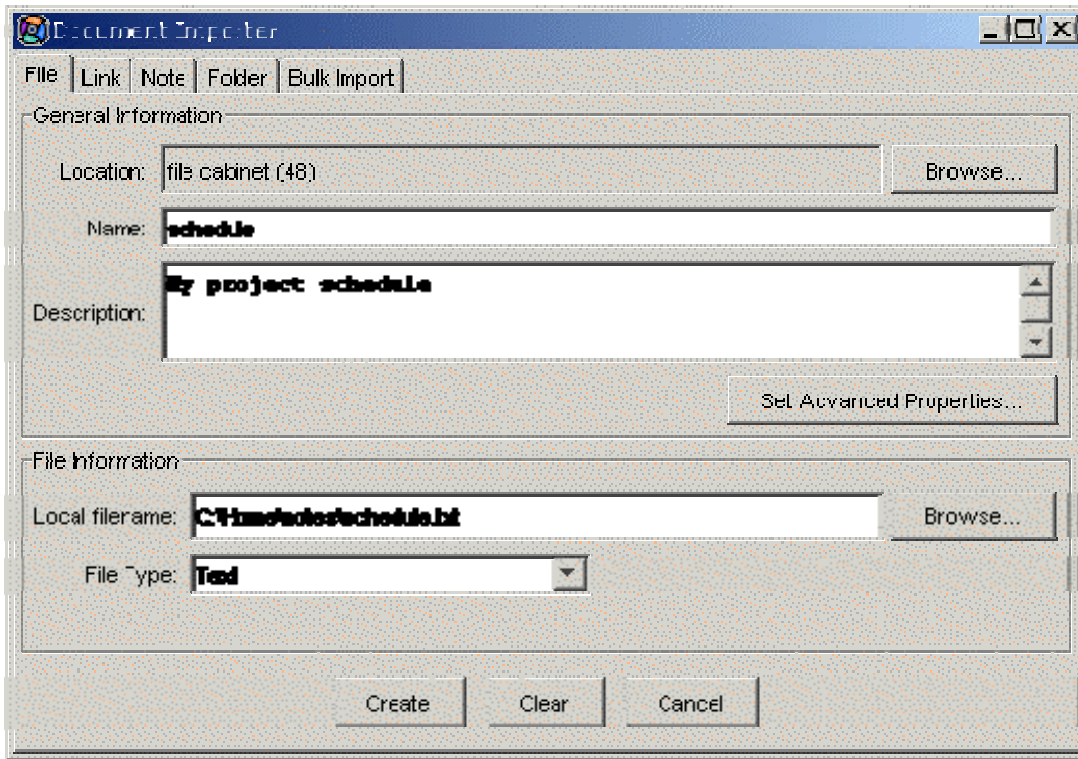
#### To import a document into a file cabinet or briefcase:

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

**Note:** Select the Set Advanced Properties button to adjust the [Document Permissions](#) and [Document Subscribers](#) for the imported file.

5. Select the **Browse button** in the File Information section of the window. The Choose Local File window will display.
6. Locate the file to import and click **Select**.  
**Note:** Use the Files of type filter to assist in locating files of a specific type.
7. Click **Create** to import the document into the collaborative environment. A progress bar will appear for longer transfers.

**Figure 37: Document Import**





## Folders and Subfolders

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

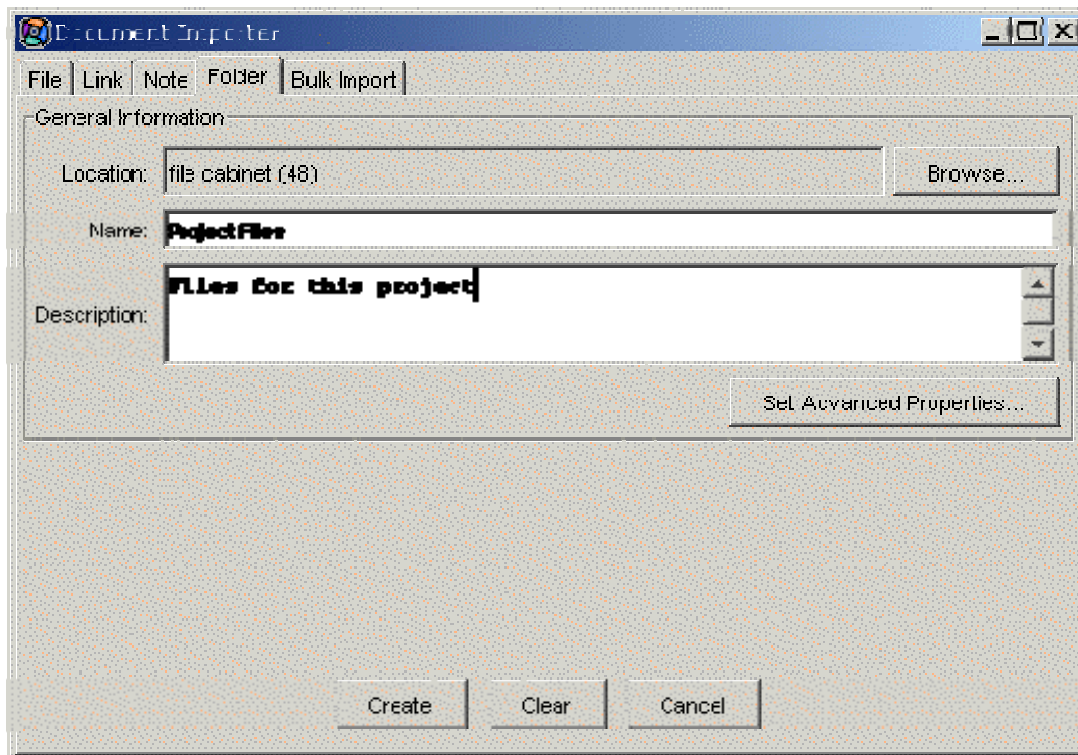
### To create a new folder or subfolder:

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

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

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

**Figure 38: Folder Import**



## Creating Other Document Types

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

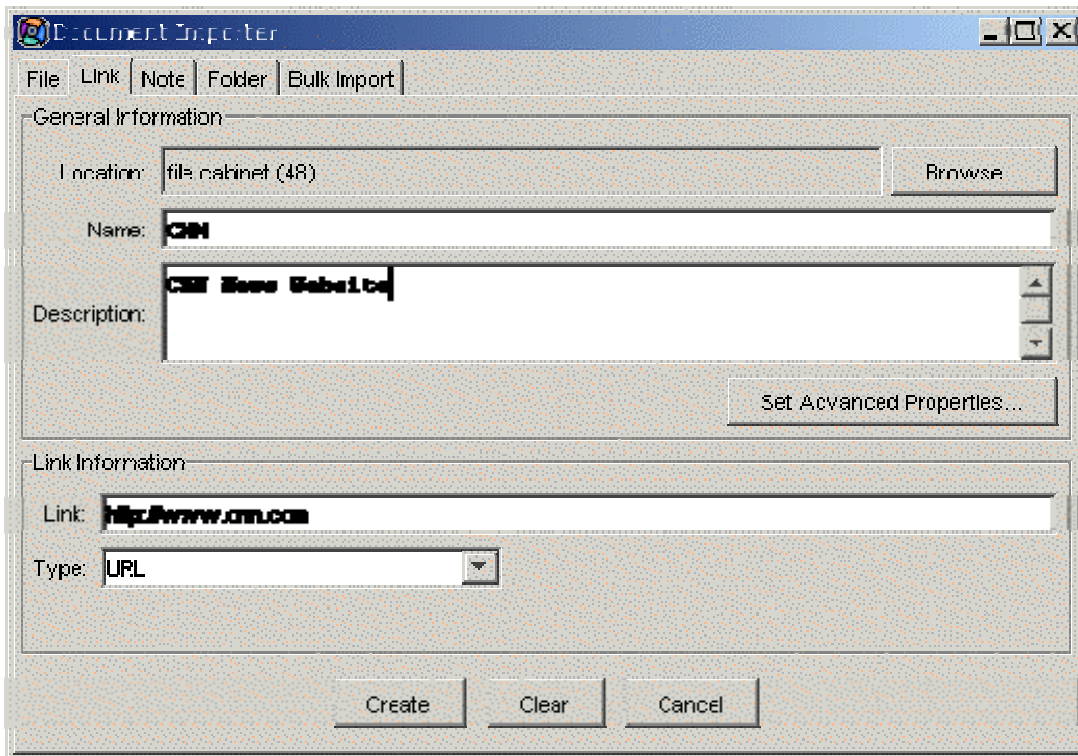
### To create a link in a file cabinet or briefcase:

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

**Note:** Select the Set Advanced Properties button to adjust the [Document Permissions](#) and [Document Subscribers](#) for the imported file.

5. Type in the URL or link information in the Link field.
6. Select the appropriate type of link in the "Type" pull down menu.
7. Click Create to create the link in the collaborative environment.

**Figure 39: Link Import**

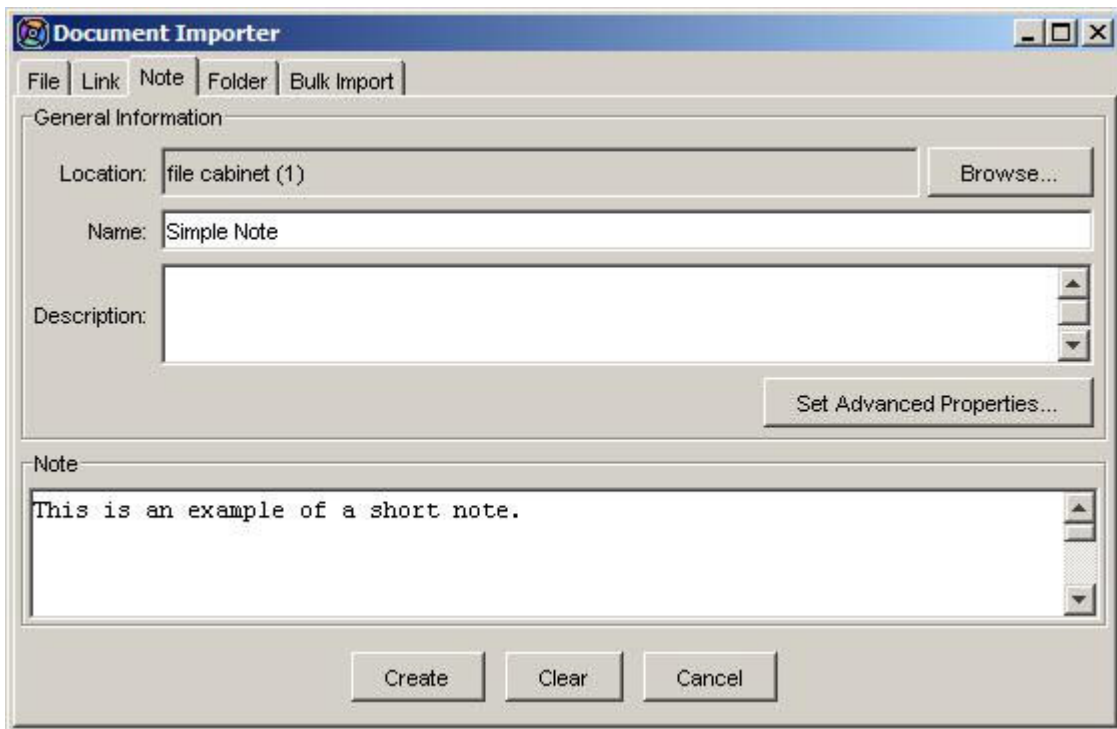


**To create a note in a file cabinet or briefcase:**

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

**Note:** Select the Set Advanced Properties button to adjust the [Document Permissions](#) and [Document Subscribers](#) for the imported file.

5. Type in the contents of the note into the Note text area.
6. Click the Create button to create the note in the collaborative environment.

**Figure 40: Note Import**

The screenshot shows the 'Document Importer' window with the 'Note' tab selected. The window has a menu bar with 'File', 'Link', 'Note', 'Folder', and 'Bulk Import'. The 'General Information' section contains a 'Location' field with 'file cabinet (1)' and a 'Browse...' button, a 'Name' field with 'Simple Note', and a 'Description' text area. A 'Set Advanced Properties...' button is located at the bottom right of this section. The 'Note' section contains a text area with the text 'This is an example of a short note.'. At the bottom of the window are three buttons: 'Create', 'Clear', and 'Cancel'.

## Moving and Copying Documents

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

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

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

**Or**

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

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

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

## Viewing Documents

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

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

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

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

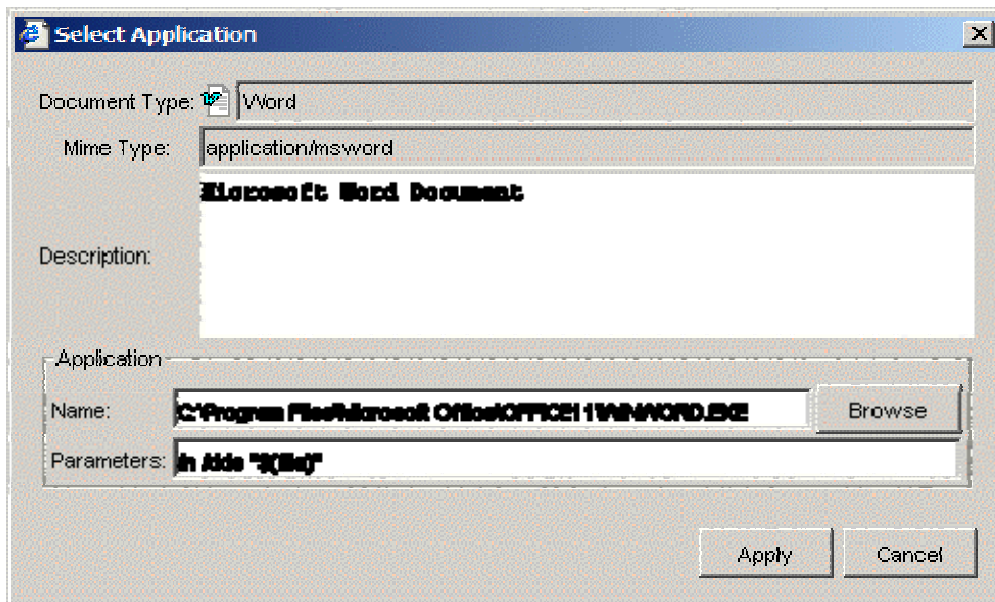
1. Select the document from the file cabinet or briefcase.
2. Right-click to view the context menu.
3. Select **Properties > View** to open the document information.
4. Right-click on a row in the "Change History" and select **View**. The document will display using the appropriate application for the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

### To select a custom application to view a document:

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

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

**Figure 41: Select Viewing Application**



## Document Subscribers

The Document Subscribers feature is used to notify users of modifications to documents or folders. A subscriber is alerted by page when a changed document or folder is checked back into a room. Changes that cause an alert to be sent include additions or deletions to folders or edits to a file. Users may also use the document subscriber list to [page](#) all subscribers to a document or folder without making changes to the document.

### To add subscribers to a document or folder:

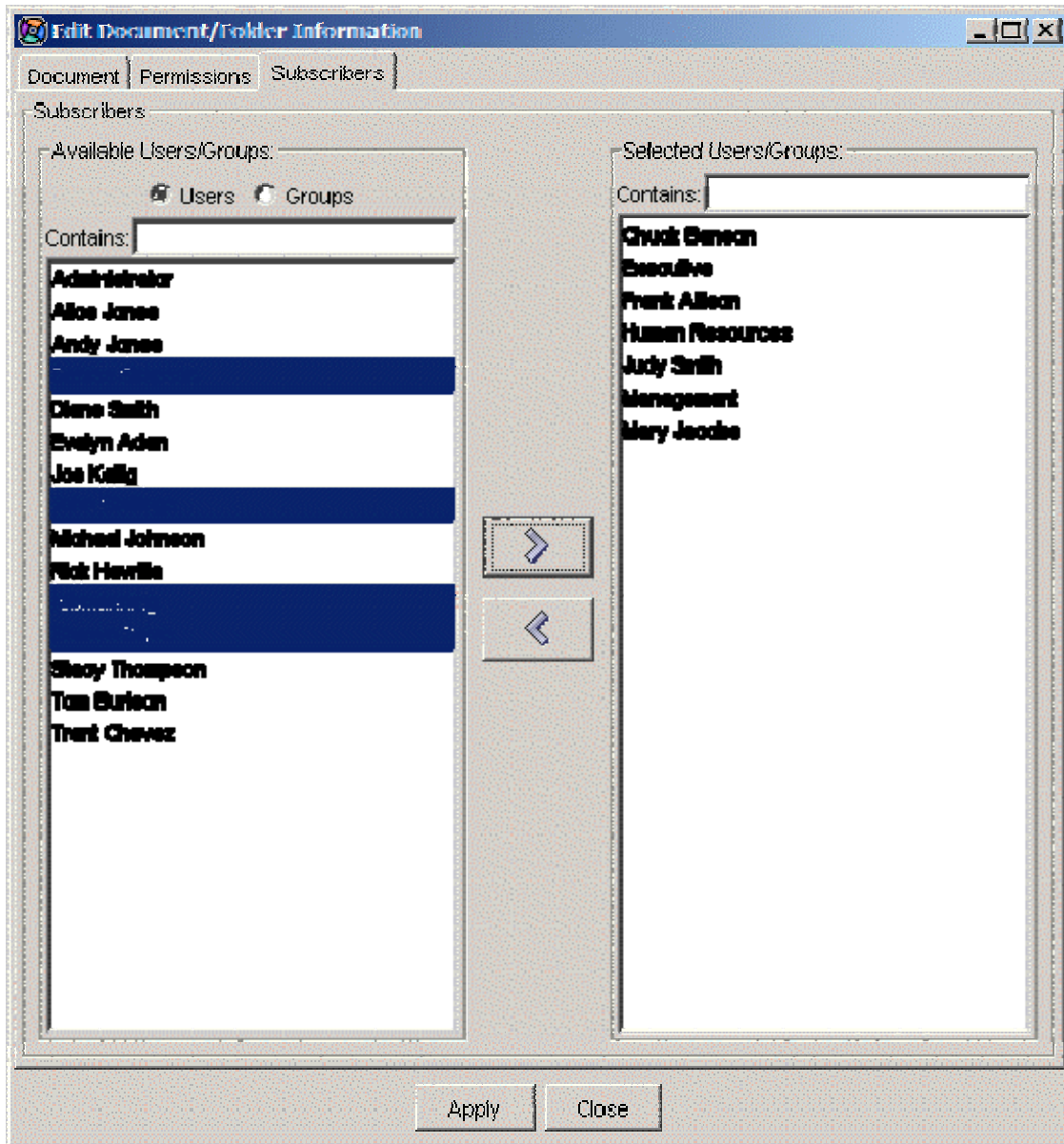
1. Select the document or folder in the file cabinet or briefcase.
2. Right-click to view the context menu.
3. Select **Properties > Edit**. The Edit Document/Folder Information window will appear.
4. Select the **Subscribers tab**.
5. Select the **Users radio button** to select by user, or the **Groups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

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

7. Click the **right arrow button** to move the highlighted groups or users to the Selected Users/Groups list.
8. Click **Apply** to add the selected users and groups to the document or folder subscriber list.

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

Figure 42: Edit Document Subscribers



### To page document and folder subscribers:

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



## Document Permissions

Document owners or administrators may create Access Control Lists (ACLs) for a document or folder. ACLs may be used to grant or deny users or groups read or write permissions to a document or folder. Any user or group that is granted read permission will be able to view the contents of a document or view the items contained within a folder without editing them. Any user or group that is granted write permission to a document or folder can view and edit the document or modify the contents of a folder. If a user or group is denied read or write permission to a file or folder they will be unable to view or edit a file or folder contents.

### To modify the read permissions for a file or document:

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

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

8. Click the right arrow button to move the highlighted groups or users to the Selected Users/Groups list.
9. Click **Apply** to grant or deny the selected users and groups read permissions to the document or folder.

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

### To modify the write permissions for a file or document:

1. Select the document or folder in the file cabinet.
2. Right-click to view the context menu.
3. Select **Properties > Edit**. The Edit Document/Folder Information window will appear.
4. Select the **Permissions tab**.

## Document Management

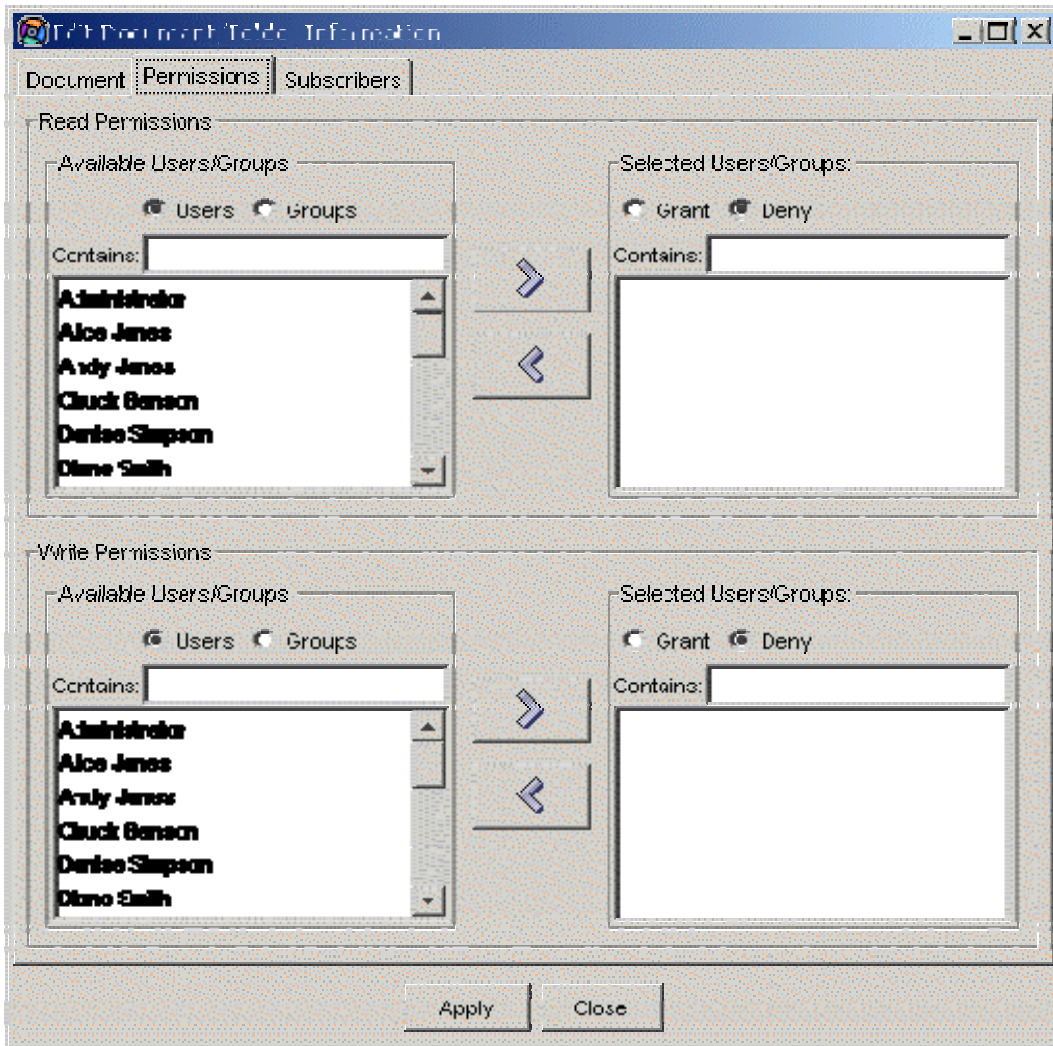
5. Select either the **Grant** or the **Deny radio button**. Granting users gives write permissions to those users while preventing all others from editing the document. Denying users prevents those users from editing the document while allowing all others access.
6. Select the **Users radio button** if selecting by user, or the **Groups radio button** if selecting by group, in the Write Permissions section of the window.
7. Highlight each group or user in the **Available User/Groups list** to be included in the Selected Users/Groups list.

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

8. Click the **right arrow button** to move the highlighted groups or users to the Selected Users/Groups list.
9. Click **Apply** to give the selected users and groups write permissions to the document or folder.

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

Figure 43: Document Permissions



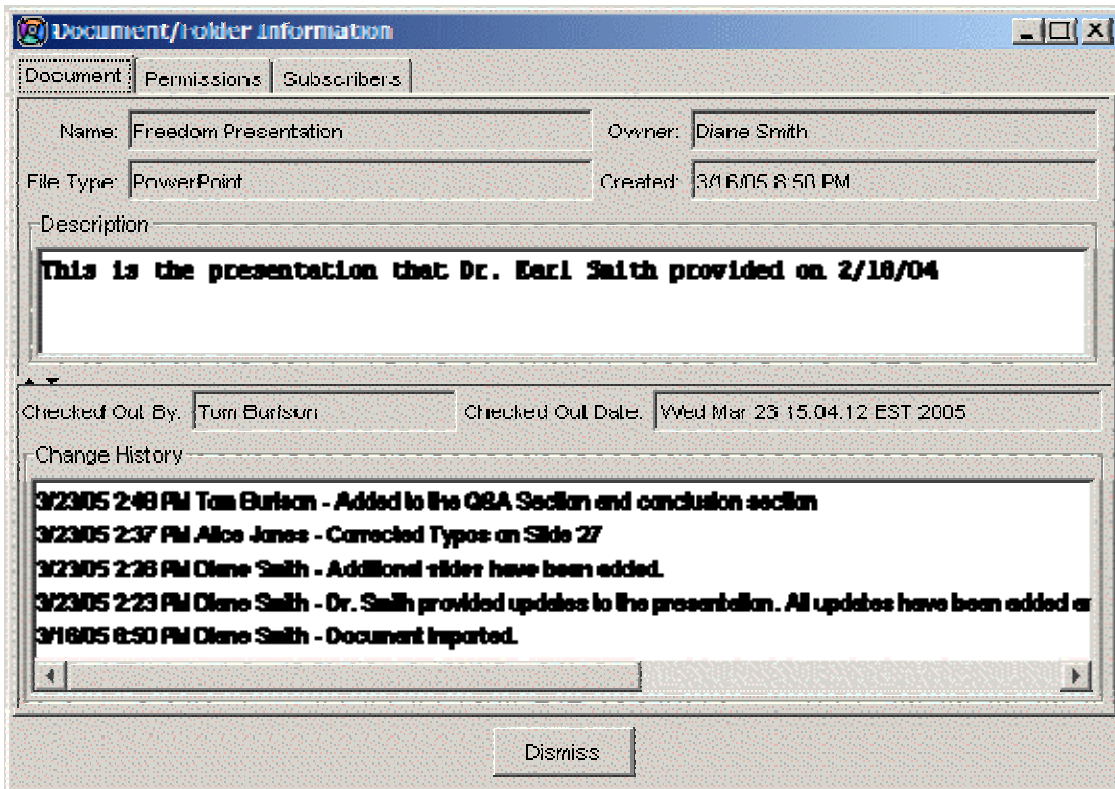
## Document History

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

### To view the change log for a document or folder:

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

**Figure 44: Document Revision History**



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

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

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

**To view the access history for a document or folder:**

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

**Figure 45: Document Access History**

**Document / History Report**

Start Date  mm/dd/yyyy End Date  mm/dd/yyyy

Find User  **Find** Find Document  **Find**  
(← to Find All) (← to Find All)

User **Select a User** Document **Select a Document**

Building Name **Select a Building** Document Action **Select an Action**

Floor Name **Select a Floor**

Room Name **Select a Room**

Number of Records **All** **Apply** **Export**

---

**Document History Results**

Document Name	User Name	Location	Action	Action Date/Time
Malecca Strait Kidnapping	John Stelling	Department of Defense/PACOM/Special Operations/116 cabinet (39)	Create Doc	03/16/2005 12:58 PM
Malecca Strait Kidnapping	John Stelling	Department of Defense/PACOM/Special Operations/116 cabinet (39)	Create Rev	03/16/2005 12:58 PM
Malecca Strait Kidnapping	Andy Jones	Department of Defense/PACOM/Special Operations/116 cabinet (39)/Recent Events	View Rev	03/23/2005 10:59 AM
Malecca Strait Kidnapping	Judy Smith	Department of Defense/PACOM/Special Operations/116 cabinet (39)/Recent Events	Create Rev	03/23/2005 02:54 PM
Malecca Strait Kidnapping	Judy Smith	Department of Defense/PACOM/Special Operations/116 cabinet (39)/Recent Events	View Rev	03/23/2005 02:54 PM

## User Preferences

### *User Information*

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

#### **To access the User Information dialog:**

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

**Or**

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

The User Information dialog will appear.

Figure 46: User Information

The screenshot shows a window titled "CollabraSuite: User Information" with a menu bar containing "File". The main content is organized into several sections:

- User Login:** A dropdown menu showing "Evelyn Aden".
- Account Information:**
  - Full Name: Evelyn Aden
  - Icon: A small icon with a "Browse ..." button.
  - Date Created: 3/12/05 4:26 PM
  - Last Login: 3/23/05 9:16 AM
- Home:**
  - Building: Department of Defense
  - Floor: PACOM
  - Room: Cambodia
- Contact Information:**
  - Organization: Cruise Missile Support
  - Work Phone: 301 989-0967
  - Cell Phone/Pager: 228 788-0834
  - Home Phone: 301 227-7765
  - Email Address: evelyn@cccs.gov
  - Forward Pages to Email while offline
- Skill Set:**
  - All Skills List: Account, Program Manager, System Engineer
  - Selected Skills List: Java Developer, Network Engineer
  - Navigation arrows between the two lists.

At the bottom of the dialog are "Apply" and "Cancel" buttons.

### The User Information dialog contains the following information:

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

### To retrieve information on another user account:

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

### To change the Icon:

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

### To change home room:

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

### To change contact information:

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

### To receive page notifications while off line:

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

### To add skills to the Skill Set:

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

### To remove skills from the Skill Set:

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

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



## ***Preferences Editor***

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

### **Items that may be customized using the Preferences Editor are:**

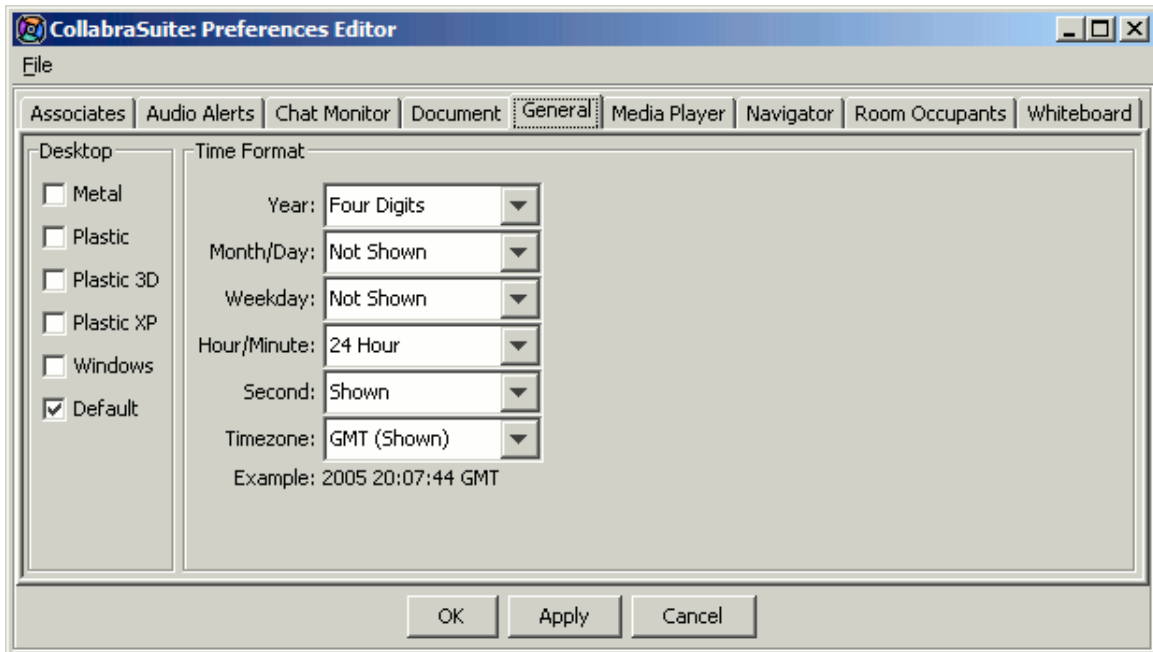
- [Associates Preferences](#)
- [Audio Alerts Preferences](#)
- [Chat Monitor Preferences](#)
- [Desktop Preferences](#)
- [Document Preferences](#)
- [Media Player Preferences](#)
- [Navigator Preferences](#)
- [Room Occupants Preferences](#)
- [Whiteboard Preferences](#)

### **To launch the Preferences Editor:**

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

The Preferences Editor window will display.

**Figure 47: Preferences Editor**



## General Preferences

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

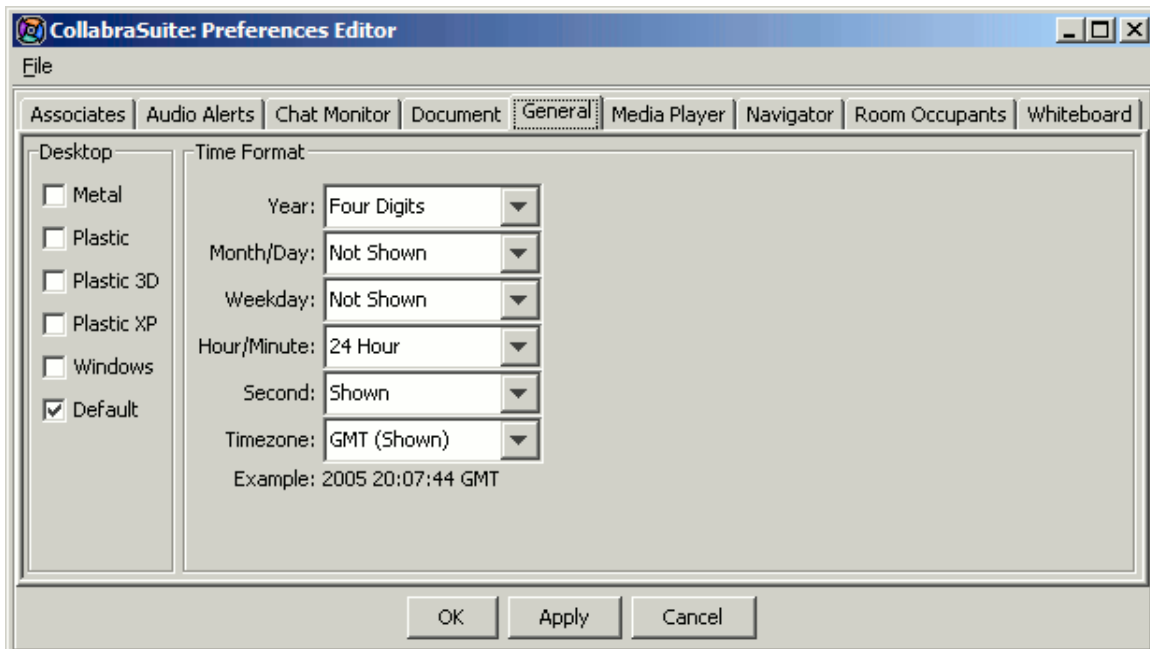
### To customize the desktop:

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

### To customize the dates and timestamps:

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

**Figure 48: General Preferences**



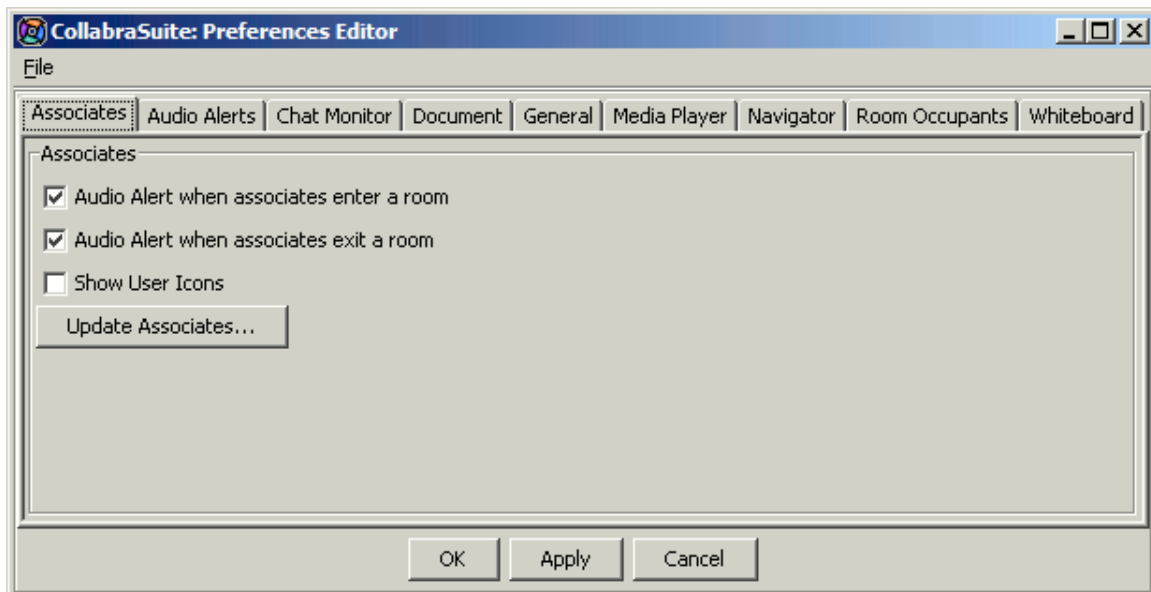
## Associates Preferences

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

### To customize the Associates List:

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

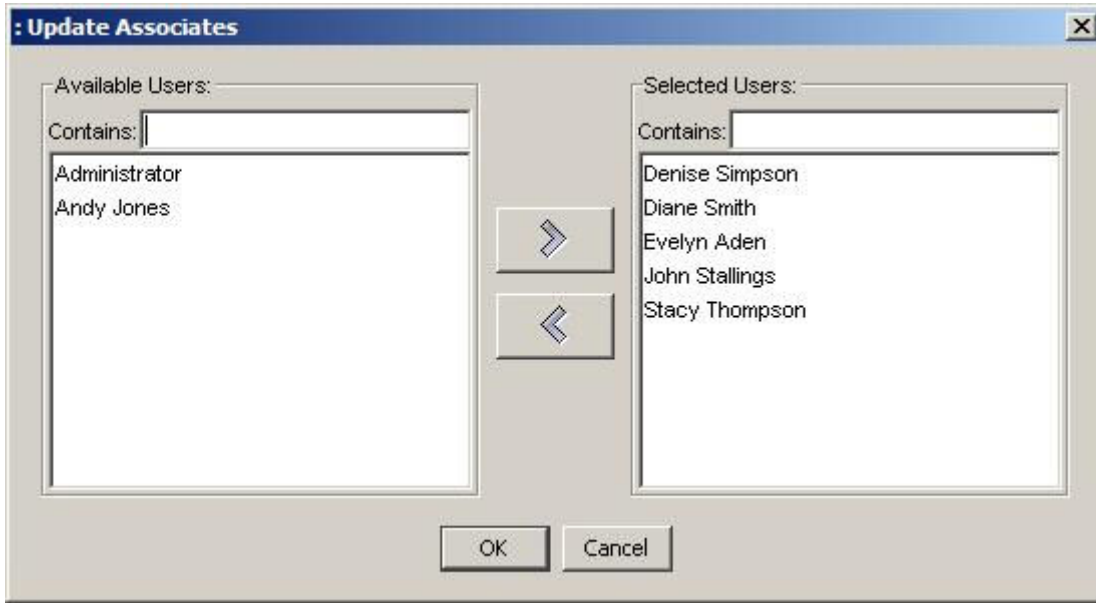
**Figure 49: Associates Preferences**



### To add/remove users from the Associates List:

1. Click **Update Associates** on the Associates tab of the Preferences Editor window.
2. Highlight each user in the Available Users list to be included in the Selected Users list.  
**Note:** To search for a specific user, enter the first few letters of the user's name in the Contains field.
3. Click the **right arrow button** to move the highlighted users to the Selected Users list.
4. Click **OK** to add the selected users to the Associates List

Figure 50: Update Associates



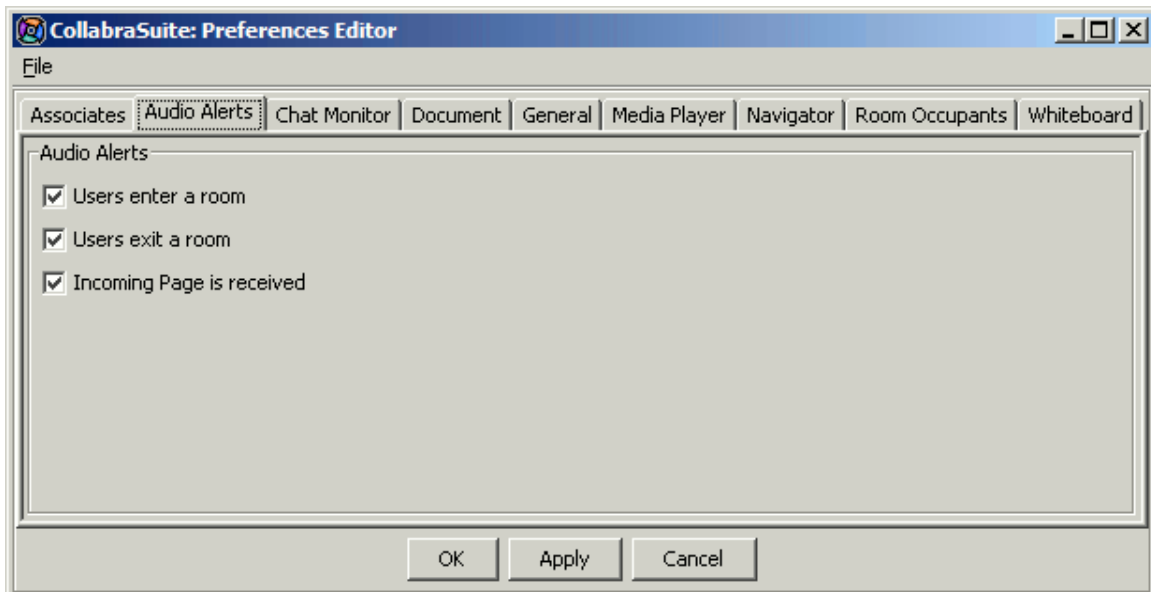
## Audio Alerts Preferences

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

### To customize audio alerts:

1. Select the **Audio Alerts tab** in the Preferences Editor window.
2. Select the check boxes next to the desired options for audio alerts.
3. Click **Apply** to save the settings for your user account.

**Figure 51: Audio Alert Preferences**



## Chat Monitor Preferences

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

### To change the idle comment in the chat monitor:

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

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

### To display only chat messages:

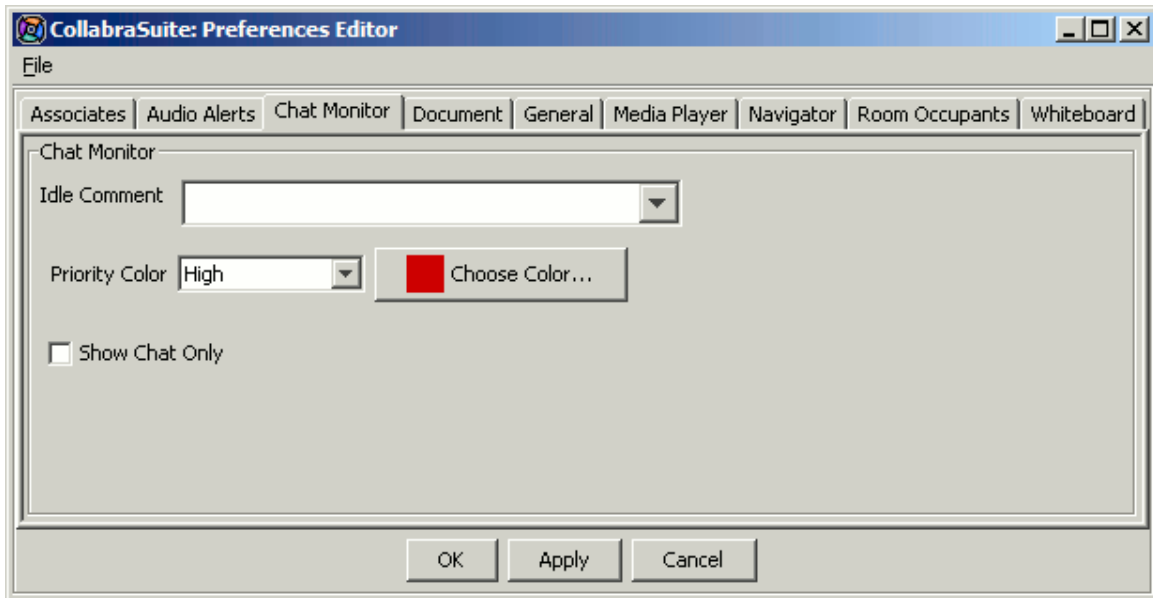
1. Select the **Show Chat Only** check box.
2. Click **Apply** to save the settings for your user account.

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

### To change priority icon color:

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

**Figure 52: Chat Monitor Preferences**





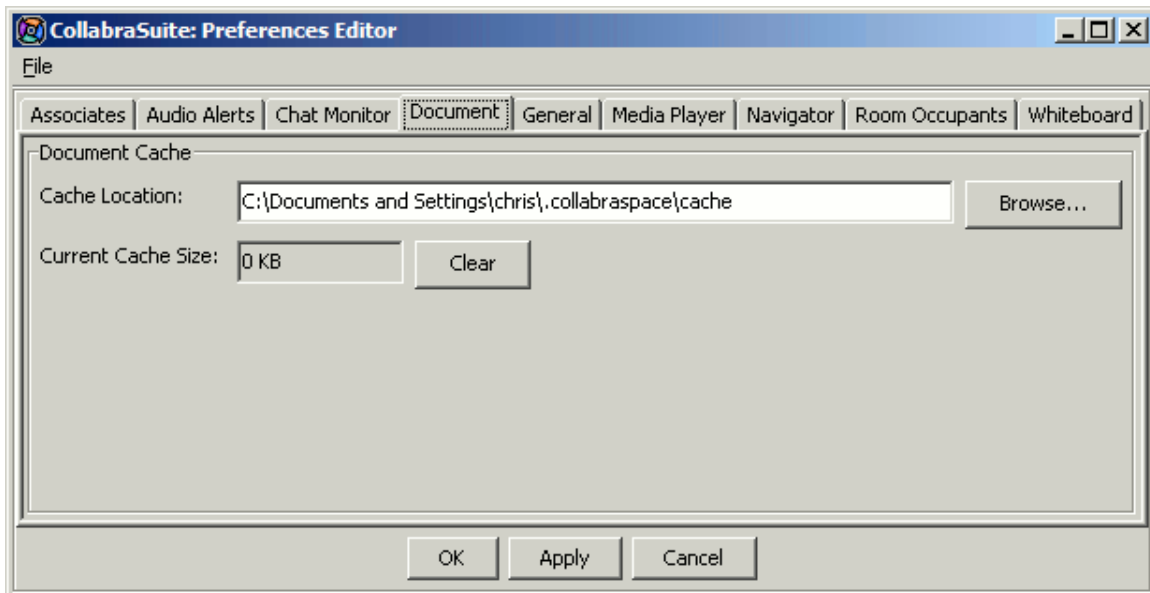
## Document Preferences

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

### To customize the document management settings:

1. Select a new **Cache Location** used by CollabraSuite for temporary storage of documents.  
**Note:** The new cache location will not take effect until the next browser restart.
2. Click **Clear** to remove items currently stored in the local cache.  
**Note:** The Current Cache Size field displays the amount of storage currently in use by CollabraSuite for temporary document storage.
3. Click **Apply** to save the settings.

**Figure 53: Document Preferences**



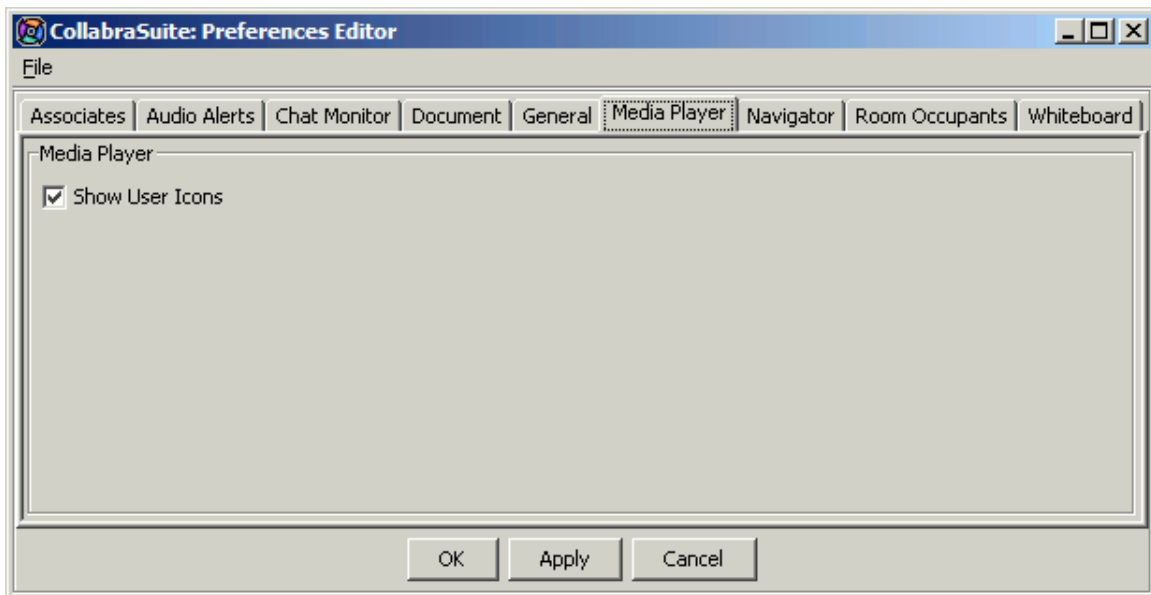
## Media Player Preferences

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

### To customize the media player:

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

**Figure 54: Media Player Preferences**



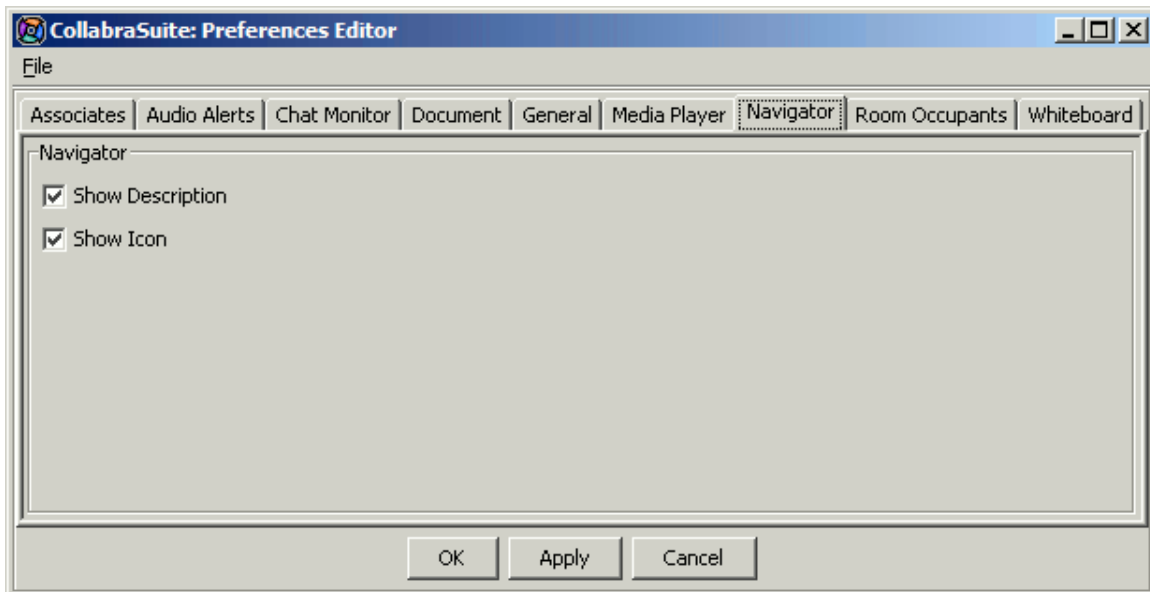
## Navigator Preferences

The CollabraSuite Navigator component can be customized individually to display the description area within the Navigator Preferences window, or to display the campus, building, floor, and room icons in the icon section of the Navigator Preferences window.

### To change navigator preferences:

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

**Figure 55: Navigator Preferences**



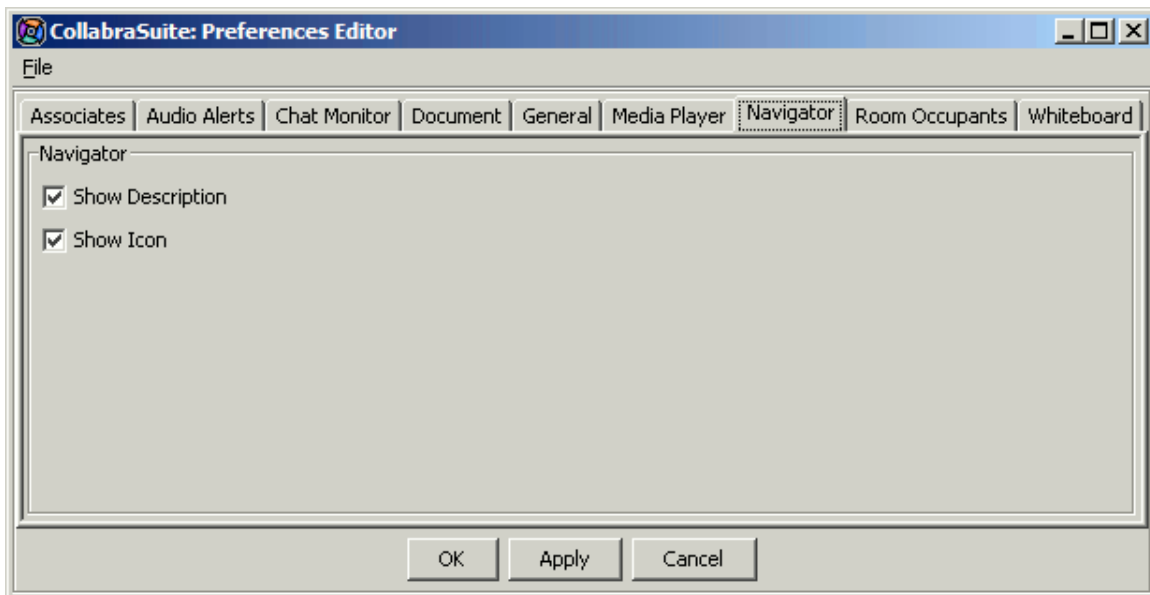
## Room Occupants Preferences

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

### To customize the Room Occupants component:

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

**Figure 56: Room Occupants Preferences**



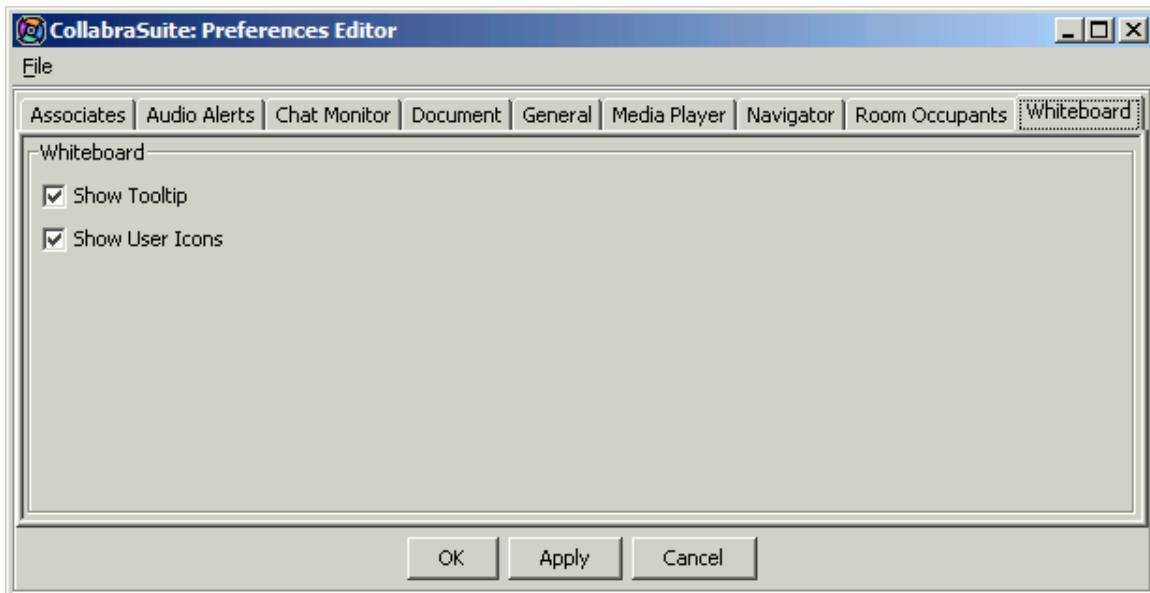
## Whiteboard Preferences

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

### To customize the whiteboard:

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

**Figure 57: Whiteboard Preferences**



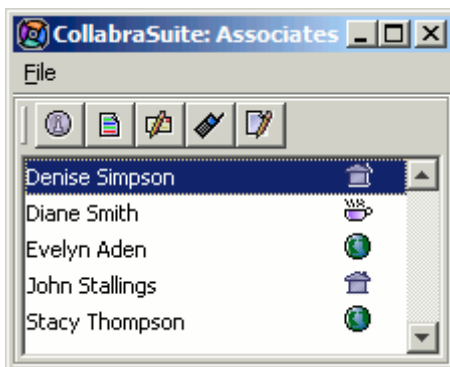
# People

## Associates


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

Once the associates list has been set, users may set preferences for viewing their associates in the collaborative environment by using the [Associates](#) tab of the [Preferences Editor](#). Each user has the option of displaying the images that users have selected for themselves in their user profile, or hiding the images for a more compact display. Users may also set audio alerts for when associates enter a room.

**Figure 58: Associates**

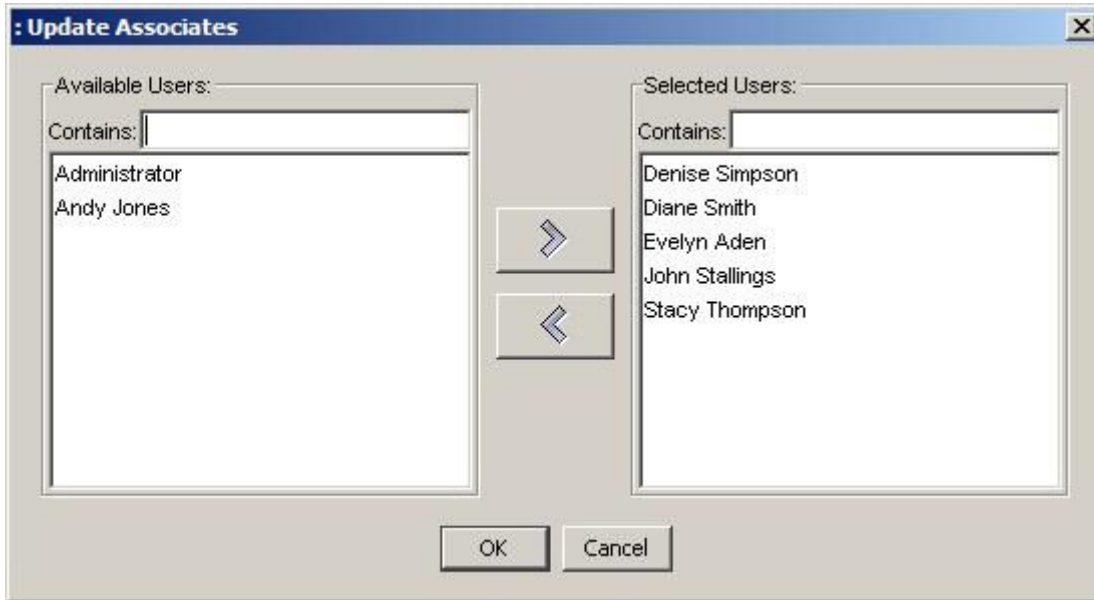


### To set or update the associates list:

1. Click the **Associates icon**  on the toolbar. The Associates window will appear with associates icons displayed.
2. Right-click to access the context menu.
3. Select **Update Associates**. The Update Associates window will appear.
4. Search for a user by typing the name in the **Contains field** of the Available Users section.
5. Select the user or users to add to the associates list and click the **right arrow button**. The users in the Selected Users section will be added to the associates list. Remove users from the associates list by selecting from the Selected Users section and clicking the **left arrow**.
6. Click **OK** to set the associates list.

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

**Figure 59: Update Associates**



## Online Users Component

The Online Users component provides presence awareness features useful for determining where other users are located within the collaborative environment. The component displays each user that is logged into the environment as well as the room they are currently in. User information is displayed in a table containing the user's login and name and the building, floor, and room where the user is located. The comment column displays a message indicating the user's idle status or personalized idle message. **Additional features** of the Online Users component include easy access to information about other users, joining another user, entering sidebar chats, paging, or phoning.

Details provided by the Online Users component include:

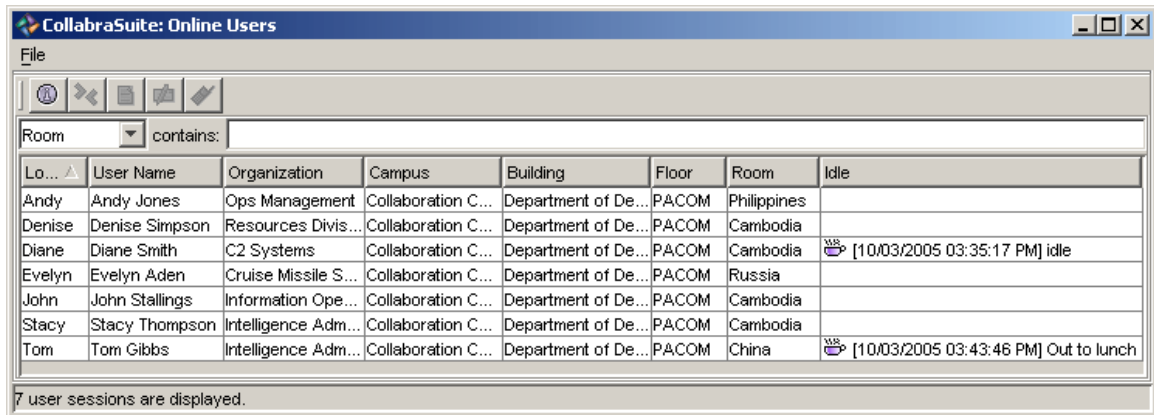
- Login ID—The unique UserID for specific individual.
- Name—The full name of a specific user.
- Organization—The organization the user belongs to.
- Building—The specific Building a user is in within the collaborative environment.
- Floor—The specific floor a user is in within the collaborative environment.
- Room—The specific room a user is in within the collaborative environment.
- Idle—The current status of the user, which can be active or idle, plus the time and the comment the user entered when they went idle.

### To access the Online Users component:



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

The Online Users window will appear.

**Figure 60: Online Users**



The screenshot shows a window titled "CollabraSuite: Online Users" with a menu bar (File) and a toolbar. Below the toolbar is a search field labeled "Room" with a dropdown arrow and the text "contains:". The main area contains a table with the following data:

Lo...	User Name	Organization	Campus	Building	Floor	Room	Idle
Andy	Andy Jones	Ops Management	Collaboration C...	Department of De...	PACOM	Philippines	
Denise	Denise Simpson	Resources Divis...	Collaboration C...	Department of De...	PACOM	Cambodia	
Diane	Diane Smith	C2 Systems	Collaboration C...	Department of De...	PACOM	Cambodia	 [10/03/2005 03:35:17 PM] idle
Evelyn	Evelyn Aden	Cruise Missile S...	Collaboration C...	Department of De...	PACOM	Russia	
John	John Stallings	Information Ope...	Collaboration C...	Department of De...	PACOM	Cambodia	
Stacy	Stacy Thompson	Intelligence Adm...	Collaboration C...	Department of De...	PACOM	Cambodia	
Tom	Tom Gibbs	Intelligence Adm...	Collaboration C...	Department of De...	PACOM	China	 [10/03/2005 03:43:46 PM] Out to lunch

At the bottom of the window, it states "7 user sessions are displayed."

### To sort the online users list:

- Select a column header. The list of users will be sorted in ascending order according to the selected column.

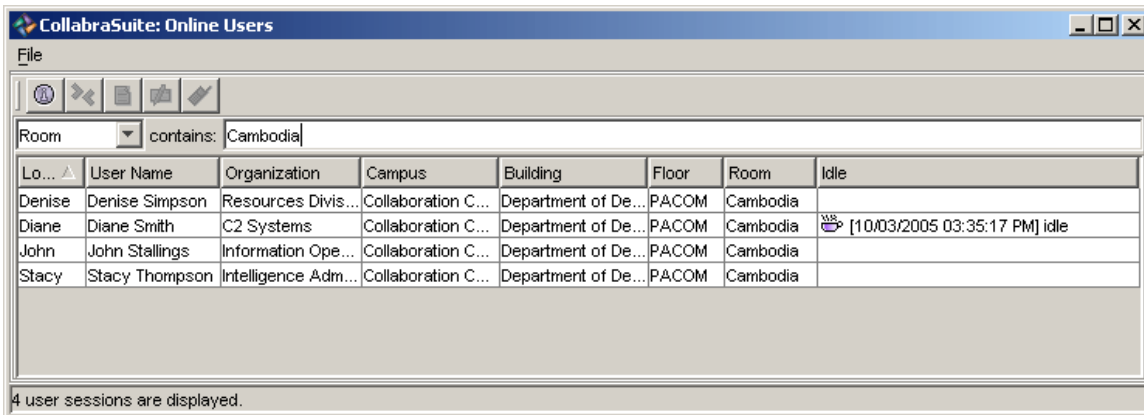


- To sort the list in descending order, select the same column header again.
- To sort by another column, simply select the appropriate column header.

**To filter the online users list:**

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

**Figure 61: Filtered Online Users**



## Skill Search

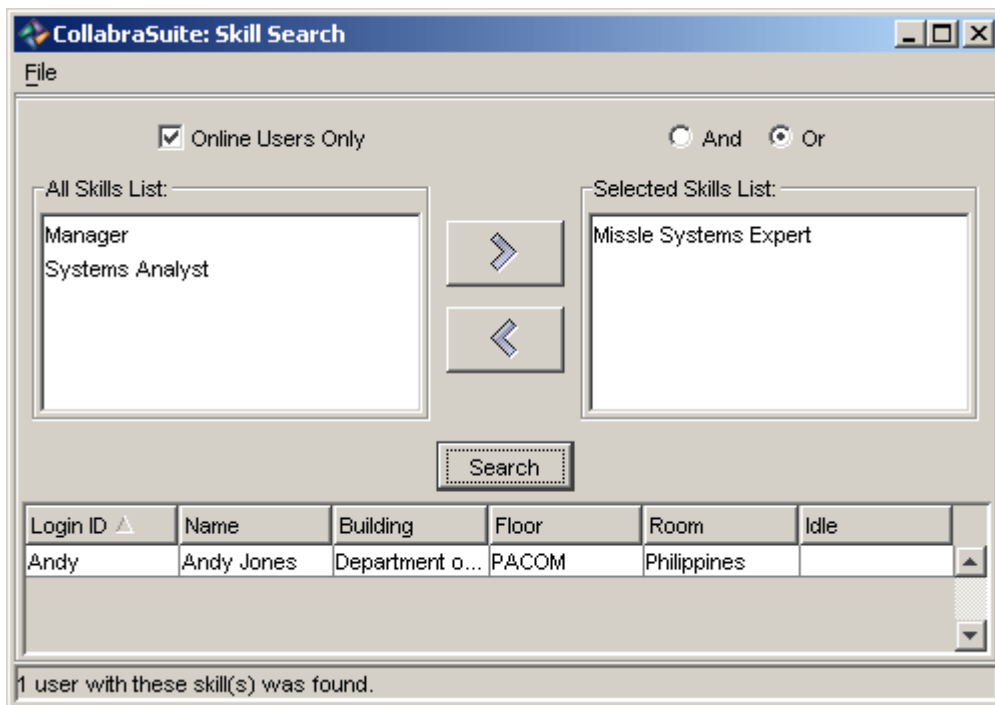
CollabraSuite skill mapping capabilities allow users to be mapped to a customized set of skills. The list of available skills is customizable at the campus level. Once skills are assigned to users, others can search for available personnel with a particular skill set. By enabling users to find others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

### To access the Skill Search window:

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

The Skill Search window will display.

**Figure 62: Skill Search**



### To search for users with a particular skill set:

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

**Note:** See the [Online Users](#) topic for actions that can be performed on users listed in the search results table.

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