VidyoDesktop™ User Guide

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1. Overview

Your VidyoDesktop™, along with your VidyoPortal™, enable you to enjoy Vidyo™ conferences with other users in your organization or in different organizations.

With the VidyoDesktop, you have your own private room (like a virtual office) to which you can invite other users, and you can accept invitations to meetings in other rooms. In addition to group meetings, you can also initiate and accept invitations to one-on-one Vidyo calls. There's also a provision to allow guests, such as customers or vendors, to be granted limited use of the system.

Your system may also have a number of Public Rooms. Think of these as virtual conference rooms. One might be used for a weekly sales meeting, another for international conferences, and so on.

This guide describes the features of your VidyoDesktop. You'll learn how to:

- Install VidyoDesktop
- Join a room and place a call
- Easily search for a user or room
- View, add, and delete contacts
- Start a VidyoConference
- Invite guests
- Control a meeting
- Change settings

THE VIDYOPORTAL

The VidyoPortal is a series of web pages that allow you to start the Vidyo meetings and invite others to join your meetings.
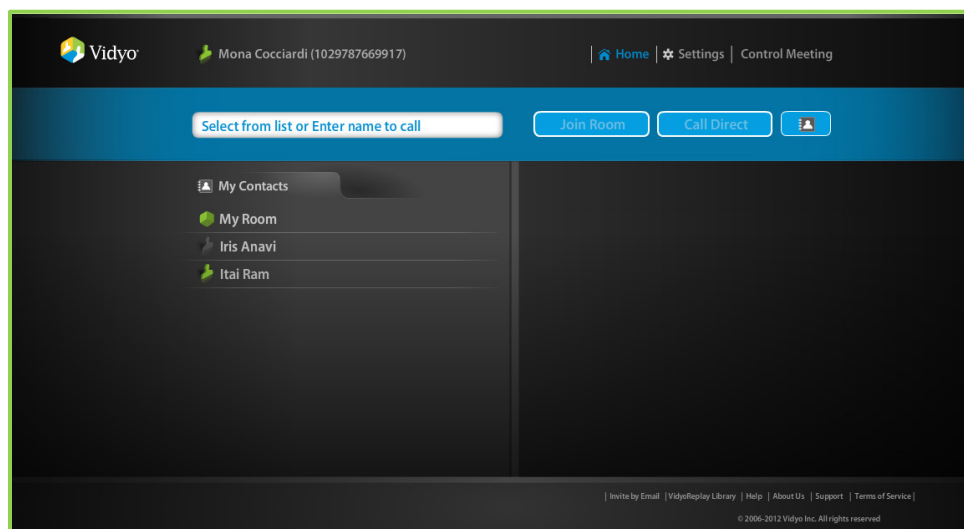
In all cases, Adobe Flash needs to be installed for the browser you're using. If it's not already installed, you can download it for free from the Adobe Web site at http://www.adobe.com/downloads. (Or more likely, your System Administrator will make sure your browser has it.) For Linux users, Chrome comes with Flash installed.

You can also access your VidyoPortal without using a Web browser. This is described later on in this guide.

THE VIDYODESKTOP

The part of the system that allows you to see and hear other meeting participants is your VidyoDesktop. This is a program that runs on your desktop or laptop computer. There are versions for Windows, Macintosh, and Linux. With VidyoDesktop, you can see as many as eight other meeting participants at a time. If you turn on self-view, you can see how others see you, either in a tiny overlaid tile in the lower right corner or in a tile the size of the other eight (for a total of nine images).

With VidyoDesktop, you can also control other aspects of your meetings. For instance, you can share an application window, such as a PowerPoint slide or an Excel spreadsheet.
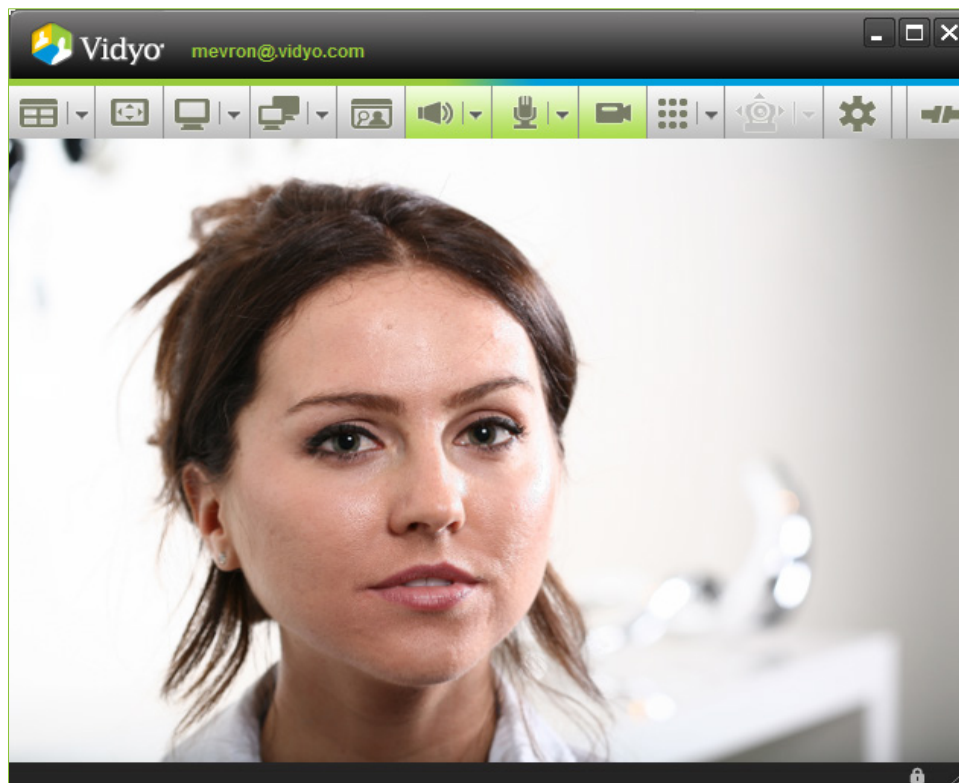
OTHER VIDYO COMPONENTS

There are also many optional Vidyo components your organization may have purchased or licensed:

- VidyoRoom™ is an "appliance" that's designed to be used in an actual conference room. Using a powered PTZ (pan-tilt-zoom) camera and a large screen, it's ideal for group conferences. The Vidyo-Room can connect to individual users, other VidyoRooms, and legacy devices.

- VidyoPanorama™ is the industry's first telepresence solution to deliver immersive interactions on up to 20 screens of 1080p at 60 fps resolution at just 10% of the cost of traditional solutions. Each individual screen can show one participant, multiple participants, or shared content.

- VidyoGateway™ enables interconnection with older conferencing systems and enables people to participate in VidyoConferences in voice-only mode from regular cell phones and landlines.

- VidyoReplay™ enables you to make video recordings that you and others can watch on demand from the VidyoLibrary. You can also use it to record live VidyoConferences for later viewing.

- VidyoMobile™ enables you to participate in VidyoConferences and point-to-point calls from your Android or iOS phone or tablet.

- If your organization uses plug-ins such as Microsoft Outlook, Microsoft Lync, IBM's Lotus Sametime, or Adobe Connect, you can integrate them with your Vidyo system.

If your organization has enabled any of these options, you'll be provided with the appropriate information in order to use them. For instance, there are separate VidyoMobile User Guides for Android and iOS. For more documentation about any of these Vidyo products, go to http://support.vidyo.com/.

2. Recommended and Minimum Requirements

SUPPORTED OPERATING SYSTEMS AND BROWSERS

- **Windows:**

  - XP SP3 (32-bit)

  - Windows 7 and Windows 8 (32/64-bit)

  - Browsers: Internet Explorer, Firefox, Chrome

- **Macintosh:**

  - OS X 10.6 Snow Leopard through OSX 10.8 Mountain Lion

  - Browsers: Firefox, Safari, Chrome

RECOMMENDED AND MINIMUM CONFIGURATIONS

Recommended Configuration: Encodes HD and Decodes Up to HD

- Windows 7
- i7 based system
- Core 2 Quad with DDR2 or DDR3 memory
- Hyper-Threading Technology
- 2 GB or more RAM
- 256 MB or more video RAM (VRAM)
- 40 MB of free hard disk space

Recommended Configuration: Encodes SD and Decodes up to HD

- Windows XP SP2
- Core 2 Duo 2 GHz
- Hyper-Threading Technology
- 2 GB RAM
- 128 MB video RAM (VRAM)
- 40 MB of free hard disk space

Minimum Configuration: Encodes CIF and Decodes up to SD

- Windows XP SP2
- Pentium 4
- 1Gb RAM

- 128 MB video RAM (VRAM)
- 40 MB of free hard disk space

RECOMMENDED AND SUPPORTED PERIPHERAL DEVICES

For the complete list of recommended and supported peripheral devices, such as webcams, speakerphones, and headsets, refer to the *Choosing Peripheral Devices for the VidyoDesktop Technical Note* or visit http://www.vidyo.com/support/peripherals/.

GETTING THE BEST VIDYOCONFERENCING EXPERIENCE

The VidyoConferencing system is designed to work through all sorts of network and endpoint deficiencies and still deliver quality audio and video. However, here are some tips to help ensure you get the best possible experience:

- Use a wired network connection when possible and disable wireless (Wi-Fi 802.11 b, g, n).

- If you use VidyoMobile on your mobile device, you can use it by connecting to either a Wi-Fi or a 3G/4G wireless network.

- Use recommended audio/video devices to prevent echo and other audio/video issues.

- Plug each device (camera, microphone, etc.) directly into one of your computer's USB ports whenever possible rather than a USB hub (whether it's one you added to your computer or it's built into your flat panel monitor or your laptop's docking station).

- If you're using a laptop, avoid running on battery—it reduces performance and video quality.

- If your computer has a Power Plan (all Windows and Mac laptops do), choose "High Performance."

- Make sure you have the latest drivers (like the latest DirectX video driver, if you're a Windows user) for the devices you use during VidyoConferencing, such as your camera, microphone etc.

3. Installing the VidyoDesktop Software

INSTALLING VIDYODESKTOP

Before you can install VidyoDesktop, you must log in to the VidyoPortal. To gain access to the VidyoPortal, ensure that you have the user name and password assigned to you by your administrator.

Your administrator may choose to deploy VidyoDesktop software at your organization using various methods. For example:

- Your administrator can perform the installation directly on your computer.

- If you are a Windows user, you can install VidyoDesktop yourself even if you do not have administrator privileges. (The Windows installer places the VidyoDesktop-related files in a user-specific directory called "AppData".)

The following procedure explains how to download and install VidyoDesktop on your own computer.
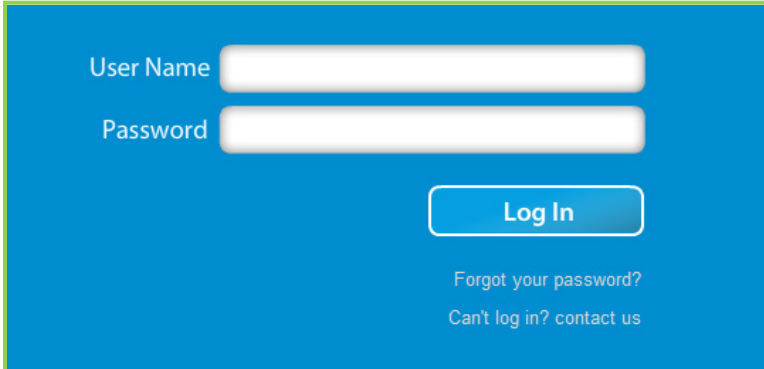
To install VidyoDesktop:

1. In an internet browser, enter the VidyoPortal IP address or URL set by your Administrator.

   Example of a portal IP address: `http://192.168.1.100`

   Example of a portal URL: `http://vidyo.yourcompany.com`

   The VidyoPortal login screen appears.

2. Enter your user name and password.

   The user name must be alphanumeric and it cannot contain any spaces or punctuation except for the @ sign, periods, underscores, or dashes. The maximum length is 40 characters. Like the user name, the password also has a maximum length of 40 characters, but there is no limitation regarding which characters you can use.

3. Click **Log In**.

Note: The VidyoConferencing system is available in 15 languages. Your Administrator sets the default system language, but you can change the language in the VidyoPortal (see page 64) and the VidyoDesktop (see page 65) separately.

The VidyoDesktop runs locally on your computer and connects to your organization's VidyoPortal. Every time you log in to the VidyoPortal, the system detects whether or not you have the software installed and whether or not you have the latest version of the software.
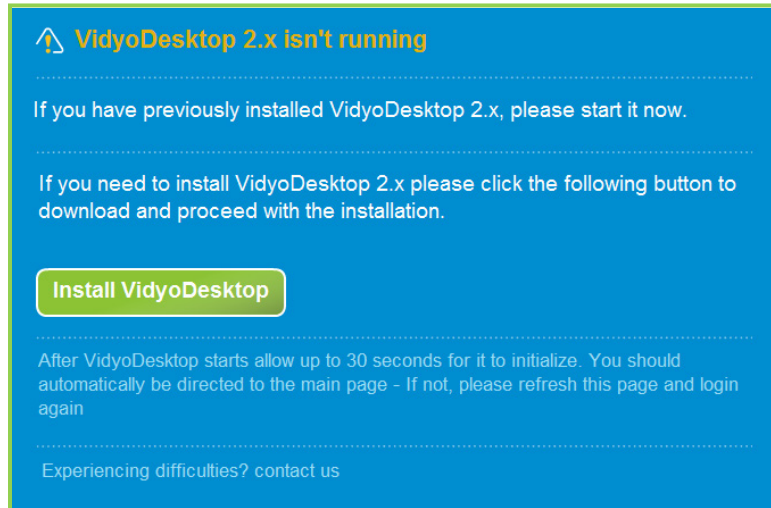
Since you do not have the VidyoDesktop installed, you'll see the following page after logging in:

4. Click **Install VidyoDesktop**.

You are then guided through the VidyoDesktop installer screens. The following sections demonstrate the Windows and Macintosh screens that you see during the VidyoDesktop installation process.

Until the installation process completes, the installation web page remains open. When the installation or upgrade is finished, you are taken to your VidyoPortal home page.

Windows Installation

The Windows installer guides you through the installation process screen by screen, which takes just a few minutes.

If this is the first time you're installing VidyoDesktop, you will first be prompted to read and accept the licensing agreement.
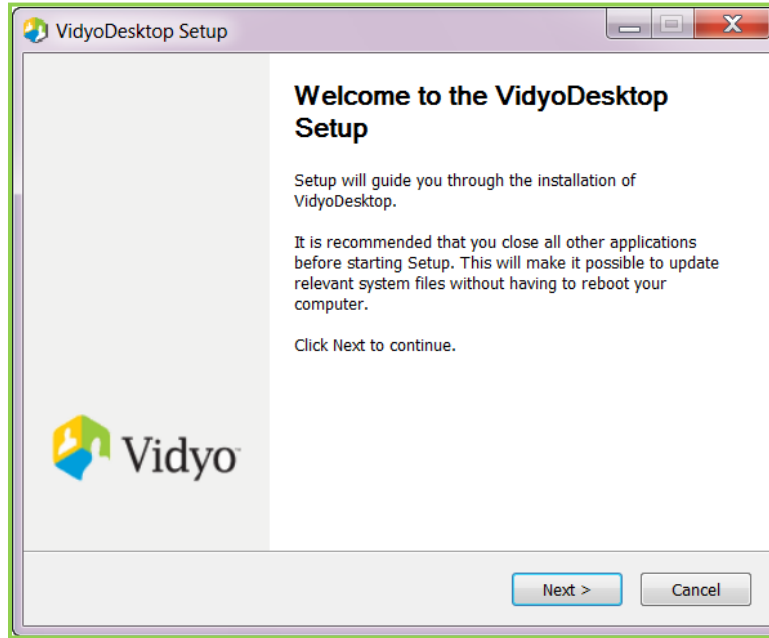
1.   Click **I Agree** and complete the remaining installation steps.
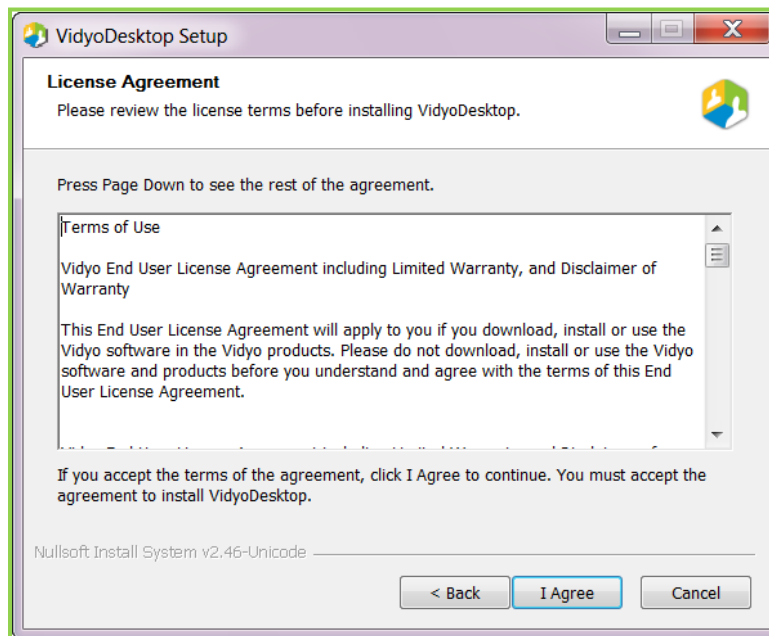
When the installation is complete, you'll see the Completing the VidyoDesktop Setup dialog box.
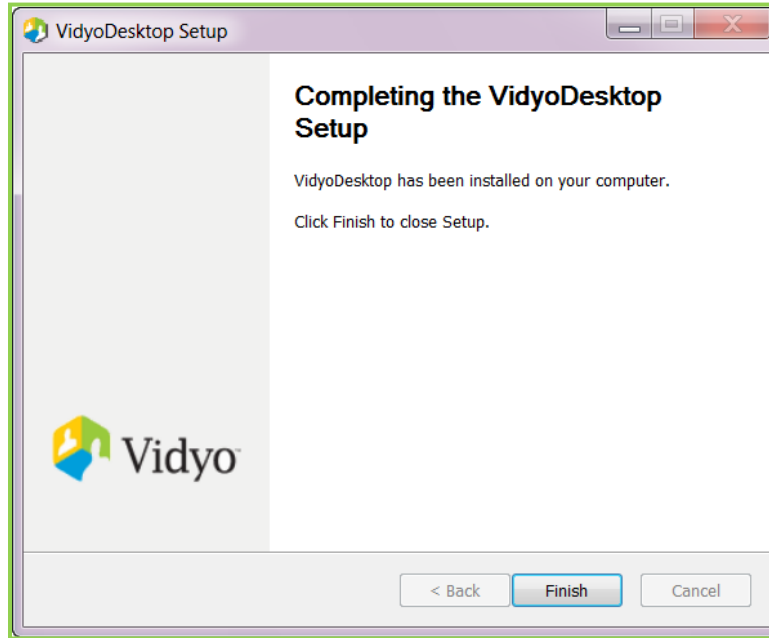
2. Click **Finish**.

- When VidyoDesktop for Windows is installed on a Windows 7 PC, a VidyoDesktop icon appears in the notification area of your taskbar (also called the system tray). The following illustration shows a Windows 7 double-height taskbar; your taskbar may look different.
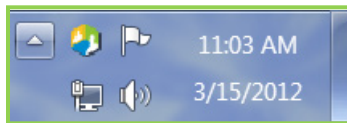
- When VidyoDesktop for Windows is installed on a Windows 8 PC with the "Metro-style" interface, a VidyoDesktop tile appears on the UI as shown in the following illustration.
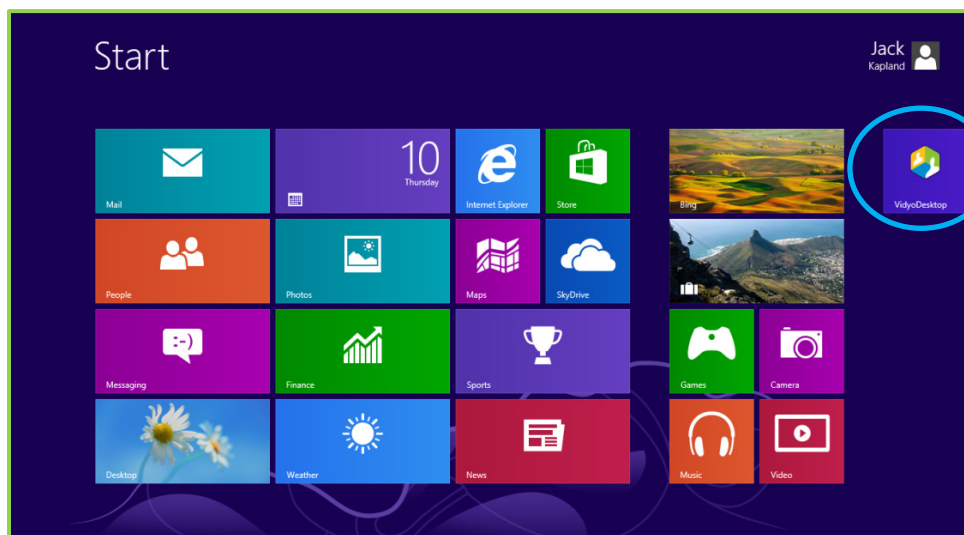
Note: VidyoDesktop for Windows 8 is digitally signed to be trusted by the Microsoft Smart-Screen security filter.

Macintosh Installation

As with the Windows installation, if you are installing VidyoDesktop for the first time, you will be prompted to read and accept the licensing agreement.
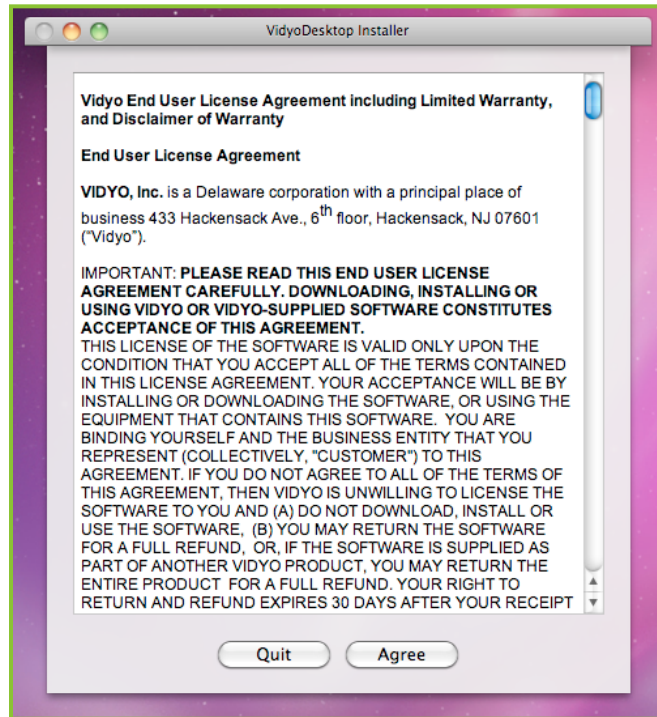
1. Click **Agree** to continue the installation.

   When the installation is complete, you see the following message.
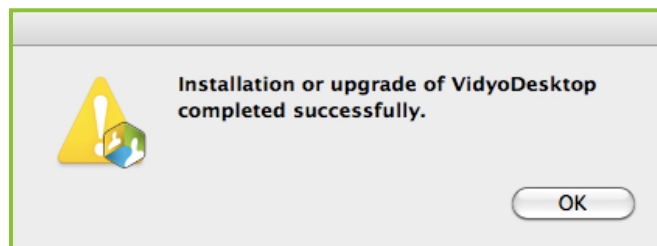
2. Click **OK** to confirm installation of the VidyoDesktop.

When VidyoDesktop for Macintosh is installed, the Vidyo icon appears in the dock:
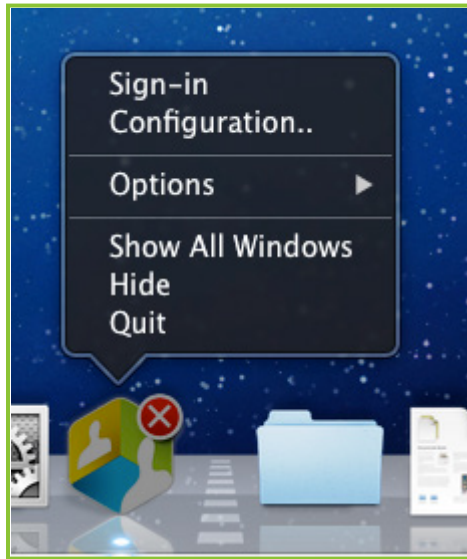
The red X indicates you're not currently signed into a VidyoPortal.

Once you're signed in, the context menu shows more options.
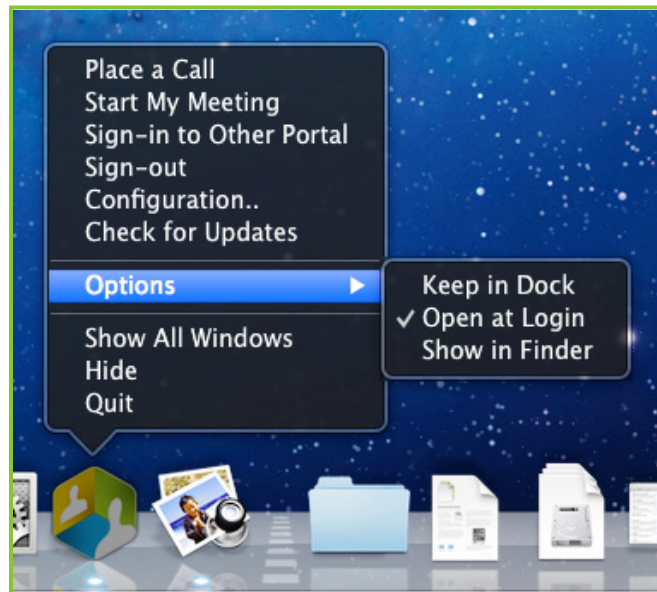
LOGGING INTO VIDYODESKTOP WITHOUT A BROWSER

If you don't want to the URL (web address) of your VidyoPortal in your Web browser, you can open your VidyoPortal home page in its own window following the steps in this section.

To log into the VidyoDesktop without a browser:

1. Do one of the following:

   ▪ Double-click the Vidyo icon in your notification area (also called the system tray).

   ▪ Right-click the VidyoDesktop icon and select **Sign-in**.

   ▪ On a Macintosh, double-click on the icon in the dock.

   Using any of these methods will open the Vidyo Sign-in dialog box.
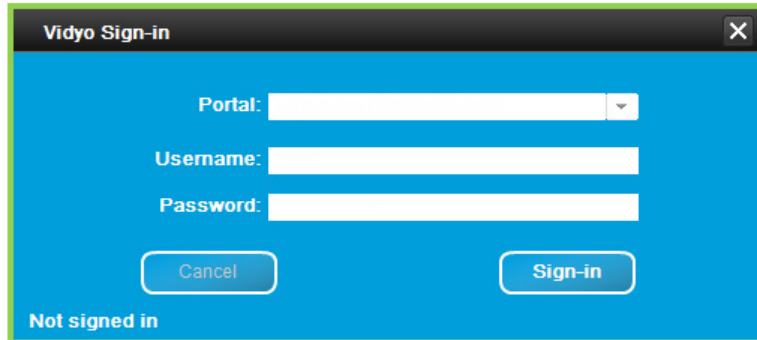
2. In the Portal field, enter the VidyoPortal hostname or URL.

   Typically, you enter a hostname with a protocol prefix: http or https. However, even if you don't, you will still be able to sign in because VidyoDesktop will try http first; if that time outs or gets redirected, VidyoDesktop will try https.

3. In the Username and Password fields, enter your username and password.

4. Click **Sign-in**.

   The VidyoPortal will open. Here is a screenshot of a VidyoPortal in a browser window opened by entering your VidyoPortal's URL in your browser:
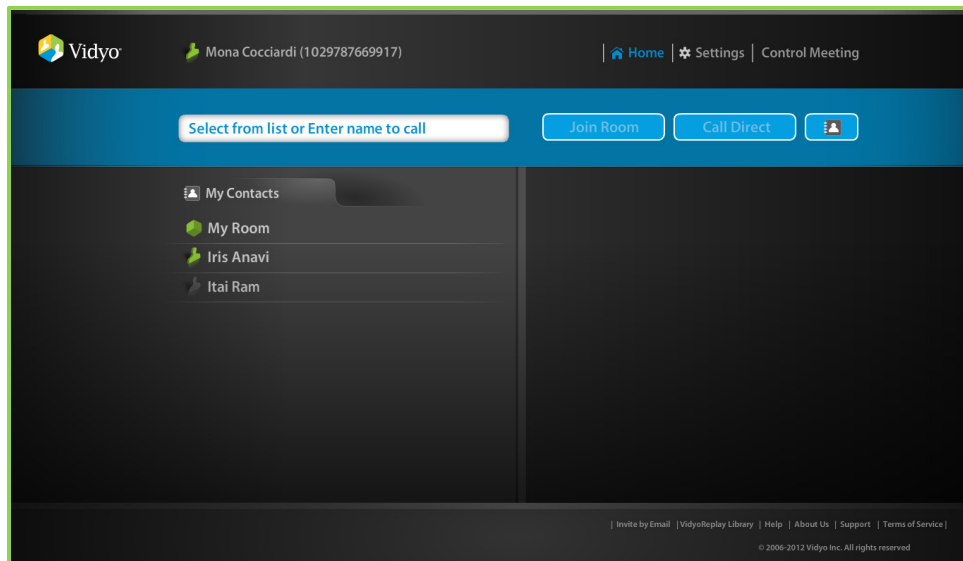
If you're a Windows user, you can see the VidyoPortal in its own window (no web browser required) by double-clicking the VidyoDesktop icon in your Notification Area (system tray) or by right-clicking the icon and choosing Place a Call. On a Mac, you can get here by taking the same steps using the icon in the dock.

UPDATING VIDYODESKTOP

As new releases of the VidyoDesktop are issued, your Admin may make them available to your organization. Each time you log into the VidyoPortal, it checks if the version on your computer is current and prompts you to download and install the latest version if it isn't.

Note: Your computer's firewall (secure connection software) may prompt you to select whether to allow or deny running the Vidyo software. Make sure you allow it to run as part of the software installation.

Updating VidyoDesktop When You're Not in a Conference

If you stay logged into your VidyoPortal for long periods of time, or log in and out via the VidyoDesktop rather than the VidyoPortal login page, the VidyoConferencing system can still alert you to a new version of the VidyoDesktop when it becomes available (Windows only). Periodically, it checks to see if a new version is available. When one is, it prompts you to update:
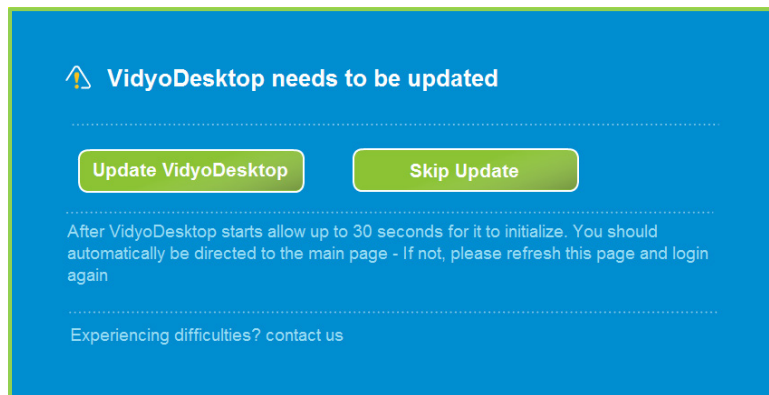
To update VidyoDesktop or to skip the update:

- To update VidyoDesktop, click the **Update VidyoDesktop** button.

  Your PC may offer you a choice of opening or saving the file. You should open the file if given a choice to. Otherwise, save the VidyoDesktop installation file to a convenient place like your desktop, and then launch the VidyoDesktop Setup application.

- To skip the update:

  1. Click **Skip Update**.

The following message appears:
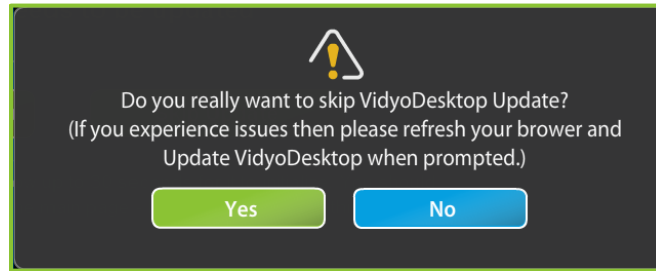
2. Click **Yes** if you want to update VidyoDesktop, or click **No** to skip the update and return to the VidyoPortal Home page.

Updating VidyoDesktop When You Are in a Conference

If you are in a VidyoConference, the VidyoDesktop Software Update dialog box appears when a new version of VidyoDesktop becomes available.
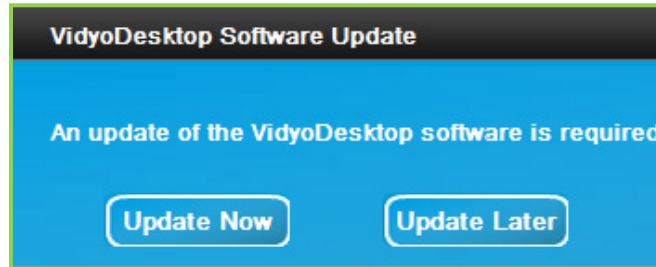
To update VidyoDesktop now or wait until later:

- To update VidyoDesktop right away, click **Update Now**.

  Your meeting automatically closes and you see a progress bar while the usual update process occurs. When the update is finished, the VidyoDesktop automatically restarts and you can resume VidyoConferencing.

- To wait until you have disconnected from your conference before updating, click **Update Later**.

  You will be prompted again later so you don't have to disconnect from your conference.

4. Using the VidyoPortal Home Page

The VidyoPortal home page enables you to join meetings or make direct calls, invite people to join your room, search for users and meeting rooms, view other users' status (personal status and room status), control a meeting you host in your own room, and set up a My Contacts list for easy access. You can also choose settings that determine the language the VidyoPortal displays, configure other options, and log out of the VidyoPortal.
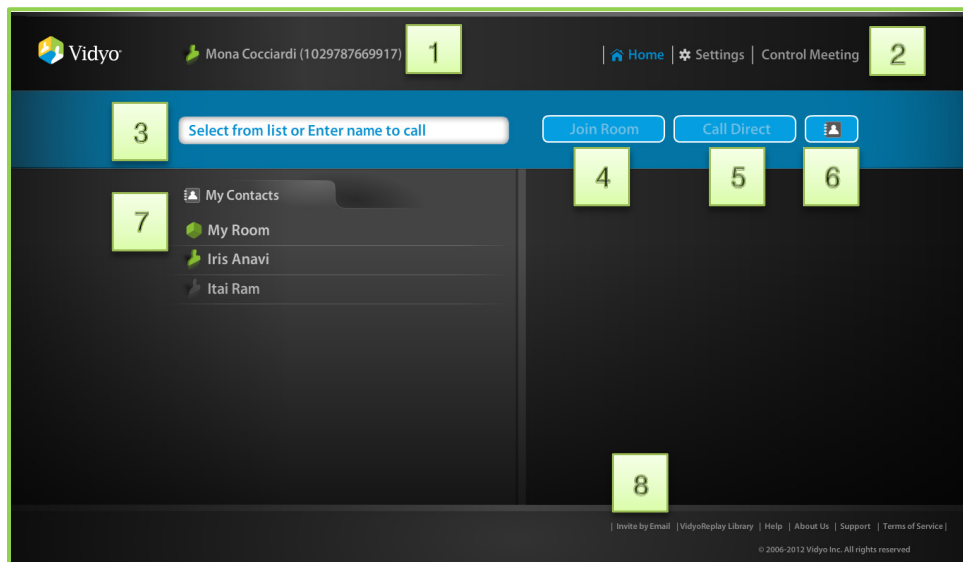
The numbered callouts on the screenshot above correspond to the list below:

1. User Status Icon, User Name, and Extension

2. Home, Settings, and Control Meeting links

3. Search field

4. **Join Room** button

5. **Call Direct** button

6. **Add/Delete Contact** button (for adding to or deleting someone from your Contacts list)

7. My Contacts/Search Results tab

8. Invite by Email and informational links

Each of these is explained in detail in this chapter.

SEARCHING FOR USERS OR ROOMS

The Search field on the VidyoPortal home page enables you to search for a user or a public meeting room. The VidyoPortal supports up to approximately 50,000 online users, which means that it is capable of

searching through up to 50,000 names. You can search by real name (first/last/initials), user name, or extension. (User names are generally shorter than real names. For example, Joseph Hasenpfeffer's user name might be "Joey".)
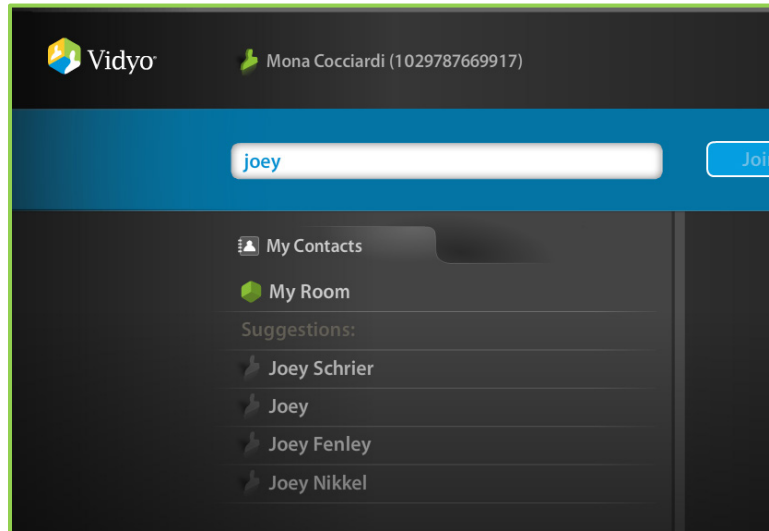
Instead of typing a name:

- If you type a percent sign (%), a list of all registered users appears.

- If you type an asterisk (*), a list of all registered users *who are currently online* appears.

The users and rooms that match your search criteria will appear on the left side of the page. Click the name to select it. The name then appears both in the Search field and on the right side of the home page (along with the user status and room status). If the contact or public room belongs to a different tenant, the tenant name also appears.

Note: This works only if your "Tenant Admin" has enabled "cross-tenant access". To recap, a "tenant" is a subdivision of users. If your system is being hosted by one of our resellers, then your whole organization is probably one tenant and cross-tenant access is probably turned off. If your organization is hosting its own system, it may have split users into multiple tenants among departmental or geographical groups. In this case, your Tenant Admin has probably turned cross-tenant access on.

You can review the user or room information that appears on the screen to see if the contact or meeting room is available. For example, the user Tony Belle is available and his meeting room is empty:
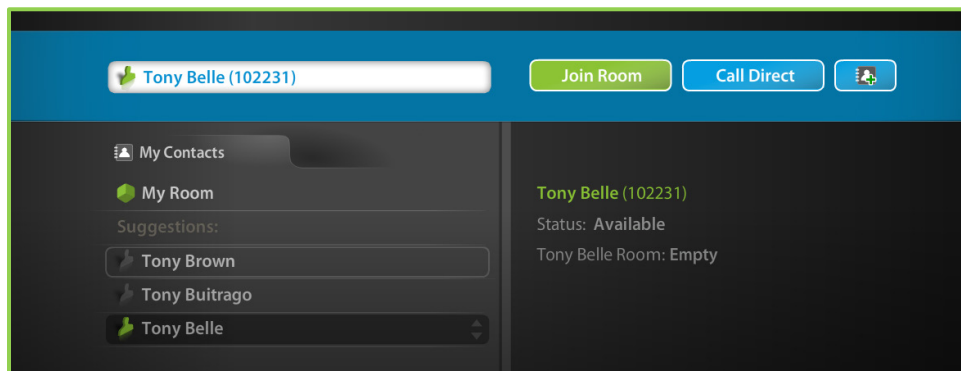
If another person's room is not locked or PIN-protected you can enter it even if they're offline. So if you have a meeting scheduled with the room owner and some other people, you can all join the room even if the owner isn't online yet. And if the owner never does come online, you can still go ahead with the meeting.

You can also create your own contacts list—My Contacts—as a fast way to place calls to people with whom you meet often. For more information, see the *Viewing, Adding, and Deleting Your Contacts* section on page **22**.

UNDERSTANDING MEETING ROOM AND USER STATUS

A meeting room must be available for you to join it and a user must be available for you to place a direct call to that user. When a meeting room is available, the **Join Room** button is active, and when a user is available, the **Call Direct** button is active.

User status and room status are independent of one another. You can join the room of a user who is not available (online) for a direct call. Likewise, you can direct call a user whose room is locked, full, or PIN protected.

Meeting Room Status

Each meeting room has a status icon that indicates whether it is available for you to join. This icon appears to the left of the user's room. When a room is available to join, the **Join Room** button is active as shown here:
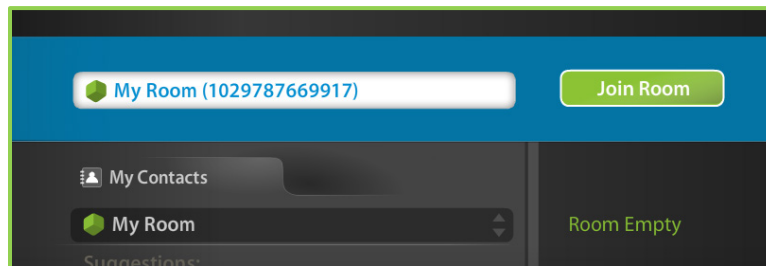
When the **Join Room** button is inactive, it looks like this:

These are the five room statuses:

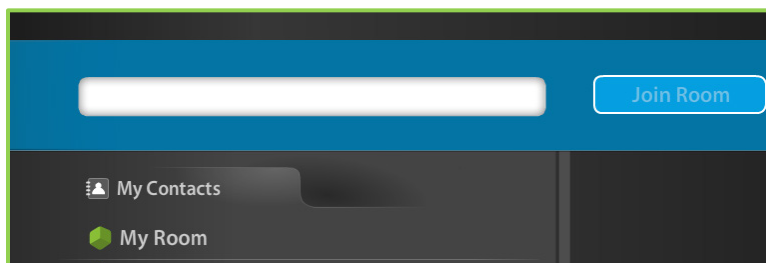| This room status icon…	Means…
	Empty — The room has no one in it and you can join it. The **Join Room** button is active.
	Full — The room is fully occupied and can't accept more participants. The **Join Room** button is inactive.
	Locked — The room is locked and you can't join it. The **Join Room** button is inactive.
	Occupied — The room is occupied but additional participants can join it. The **Join Room** button is active.
	PIN Protected — You must enter a PIN to join the room. The **Join Room** button is active. (Typically, the room's owner will email you the PIN for the meeting.)

Note: User status and room status are independent of one another. You can join the room of a user that is not available (online) for a direct call. Likewise, you can call a user whose room is locked or full.

User Status

A user's status determines whether you can place a direct call to them, join their room, or invite them to attend a meeting. This icon appears to the left of the user's name.

In the screenshot below, this VidyoPortal's owner, Mona Cocciardi, is online. Her room is empty. She has brought up a contact, Tony Belle, by typing his name in the Search field. Tony Belle is available.

18
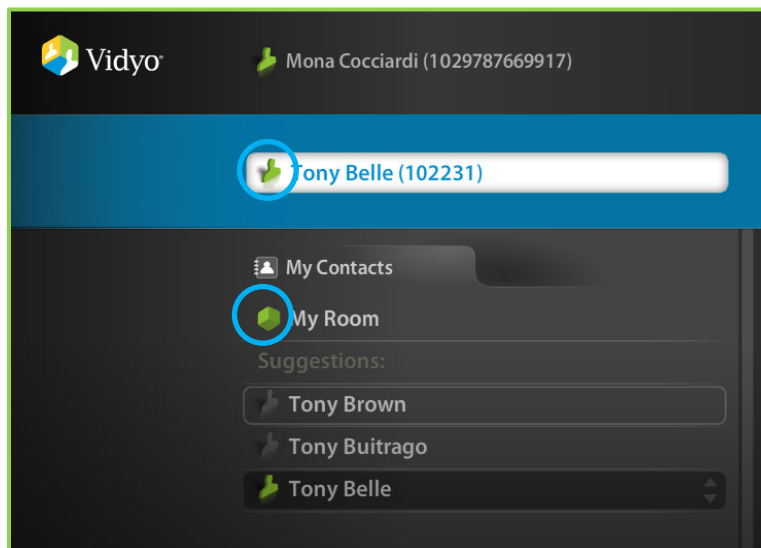
These are the eight user statuses:

This user status icon…	Means…
	Available — The user is available for a direct call, to join a room, or to be invited to attend a meeting. The **Call Direct** button is active.
	Busy — The user is busy and you cannot contact them with a direct call or invite them to join your room. You can join their room if it is available (not Full or Locked). The **Call Direct** button is inactive.
	In Room — The user is in their own room. You cannot call them directly; therefore, the **Call Direct** button is inactive. You can join their room if it is available. They can leave their room and join yours if they choose to.
	In Room/Room Full — The user is in their own room and the room is full. You cannot call them directly or join their room. They can leave their room and join yours if they choose to.
	In Room/Room Locked — The user is in their own room and the room is locked. You cannot call them directly or join their room. They can leave their room and join yours if they choose to.
	In a PIN-protected Room — The user is in their own room and the room is PIN protected. You cannot call them directly, but you can join their room if you have their PIN code. They can leave their room and join yours if they choose to.
	Offline — The user is not logged in. The **Call Direct** button is inactive. You cannot place a direct call to them, but you can join their room, depending on its status.
	Legacy — The conferencing system uses legacy videoconferencing technology (such as H.323 and SIP). There is no personal room.

JOINING A ROOM OR PLACING A CALL

Once you have found the user or room you want to call and that user or room is available, you can either join a room or place a call directly to the user. You can also call a legacy system, which uses traditional H.323 and SIP-based videoconferencing technology.

Joining a Room

The **Join Room** button enables you to join a room to participate in a meeting. You can join your own meeting room for a meeting you host yourself, or join another user's room. The owner of the meeting room is the host. The **Join Room** button becomes active when you select your own room or any private or public room that is not full, busy or locked.

To join your own room, click My Room in the VidyoPortal home page and then click **Join Room**.

To join another contact's room, search for a contact in the Search field as described in the *Searching for Users or Rooms* section on page **15** (or select a user from your My Contacts list) and click the **Join Room** button.

To join a room:

1. Ensure that the user or room you want to call appears in the Search field on the VidyoPortal home page.

2. Click **Join Room**.

    Keep in mind that the **Join Room** button will be active only if you are allowed to join the room (that is, the status of the room is Empty, Occupied, or PIN Protected).

    If you are hosting the meeting, you see a list of participants on the right side of the page under In My Room.
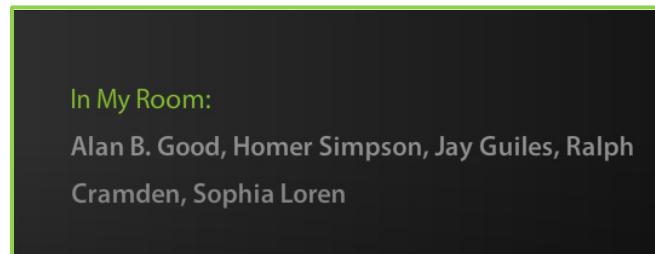
The VidyoDesktop launches and takes you to the meeting room.

When you host a meeting in your own room, you see a list of attendees on the right side of the home page under In My Room. When you video conference with users from other tenants, you also see their tenant names.

Placing a Voice-Only Call

A participant without access to a VidyoPortal as either a registered user or guest can join a conference in your room by phone. The phone number and extension for calling into your room appear in the My Room settings page, the Control Meeting page, and the VidyoPortal home page when you select My Room. The numbers also appear in the message sent when you invite a participant by email to attend a meeting.
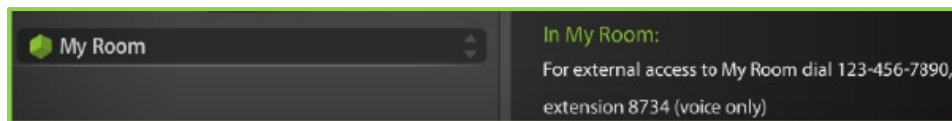
When a participant joins a conference by phone, their phone number appears in the list of participants.

Placing a Direct Call

The **Call Direct** button starts a direct (call with another contact. To call direct, search for a contact in the search field as described in the *Searching for Users or Rooms* section on page **15** (or select one from your My Contacts list if they are on your contacts list) and click **Call Direct**.

Note: The **Call Direct** button is active only when the selected contact is available for a direct call.

The VidyoDesktop launches and the person you are calling sees an alert on their screen to notify them of the call:
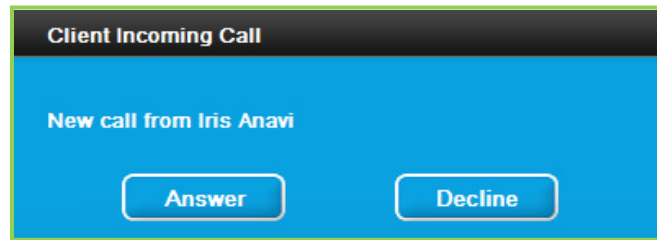
(This is also the screen you'll see when another user invites you to a direct call.)

Note: A direct call involves just two users; no additional users can join. When you call a meeting room and there are just two of you in the room, it is similar to being in a direct call. The difference is that others can potentially join you in the meeting. A direct call is always only between two people.

Placing an Inter-Portal Communication (IPC) Call

In the past, you could not join a conference with someone who was on a different VidyoPortal; however, with the Inter-Portal Communication (IPC) feature, now you can. IPC is built into all Vidyo systems running VidyoPortal version 2.2 or later. You can also use IPC with version 1.1 and later of VidyoMobile for iOS and VidyoMobile for Android (as long as you're also using VidyoPortal version 2.2 or later).

Your organization has the choice of enabling or disabling IPC. If it's enabled, you'll be notified.

Not only can IPC be enabled, but it can be based on an *Allowed* List or a *Blocked* List. In other contexts, you may have heard the terms "whitelist" and "blacklist." The lists in IPC are sort of like these. Your Administrator must determine if your organization will use an Allowed List or Blocked List. Here's the difference:

- With an Allowed List, you *cannot* communicate with any other Vidyo system *unless* it's in the list.

- With a Blocked List, you *can* communicate with any other Vidyo system in the world *except* those in the list.

Someone in your IT department or Help Desk should tell you what kind of list you're using and periodically let you know when a domain is added or deleted from the list.

Before placing an IPC call, keep the following in mind:

- In order to join the room of a user on another Vidyo system, *both* systems must have IPC enabled.

- You can't call a user of another Vidyo system directly (point-to-point). You can only join their room.

To place an IPC call:

1. In the Search field, enter the Vidyo address of the person you want to call using this format: `user_name@portal_name`.

Note: Although this looks like an email address, it's not. Rather, it's a unique Vidyo address. Let's say this person, whose name is Hugh Hakston, uses the user name **hhakston** when making Vidyo calls from his VidyoPortal. If he's on a different VidyoPortal from you, when you want to call him, you'll have to enter his Vidyo user name (**hhakston**), the **@** sign, and then the domain name of his VidyoPortal (in this case, it's **vidyo.phu.edu**).

One place you can find a person's Vidyo address is in guest email invitations (to read more about inviting guests and to see a sample email invitation, go to page 24).

2. Click **Join Room**.

Remember that the **Join Room** button is the only way you can use IPC. The **Call Direct** button will be dimmed. You cannot use IPC to make a direct call.

Calling a Legacy System

A legacy system is a conferencing system that uses older video conferencing technologies. Cell phones (that don't have VidyoMobile installed) and landline phones are also considered legacy systems. Your Vidyo system must have the optional VidyoGateway component to interact with legacy systems.

To connect to a legacy system that has not been added as a user in the VidyoPortal, you must enter its extension number followed by the IP (Internet Protocol) address of the legacy system. To obtain the IP address of a legacy system, contact your Administrator.

To call a legacy system:

1. In the Search field, enter the extension number of the legacy system followed by its IP address.

To obtain the IP address of a legacy system, contact your system administrator.

2. Click **Call Direct**.

| 03111.22.333.44 | Join Room | Call Direct |

Note: For additional ways to dial to a legacy system, see the *VidyoGateway Administrator Guide*.

VIEWING, ADDING, AND DELETING YOUR CONTACTS

If you have contacts that you meet with on a regular basis, you can save them to your My Contacts list for easy selection. You can also delete any of the contacts that you already have on your list.

Viewing Your Contacts

The My Contacts tab displays the following:

- A list of contacts that match the search criteria you entered in the Search field.

- The **My Room** button, which enables you to join your own room for a meeting that you are hosting.

- The permanent contacts you added to My Contacts using the **Add Contact** button. For more information, see the following section, "Adding and Deleting Your Contacts".

The My Contacts list always remains visible so that you can easily select users or rooms to call.
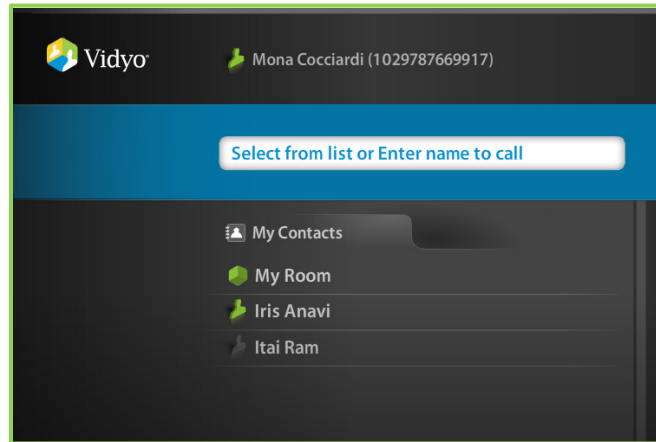
Adding and Deleting Your Contacts

To add a contact:

1. Search for the contact on the VidyoPortal home page.

2. Click to select the contact.

3. Click the **Add Contact** button.

Your contact appears in alphabetical order on the My Contacts list. If you have many contacts, you may need to scroll to view them all.

To delete a contact:

1. Search for the contact on the VidyoPortal home page.

2. Click the **Delete Contact** button.

ACCESSING THE SETTINGS PAGE AND THE CONTROL MEETING PAGE

The VidyoPortal home page provides you with links to the Settings page and the Control Meeting page. The links are located at the top right of the home page.

- **Settings** — Enables you to change the following settings: account, language, and My Room. For information, see the *Changing Your Settings* section on page **62**.

- **Control Meeting**— Provides you with control over meetings hosted in your meeting room. You can invite participants to attend a meeting, lock your room, mute/unmute participants, disconnect participants, and more. For more information, see the *Controlling Your Meeting* section on page **54**.

INVITING GUESTS BY EMAIL

Your Vidyo system gives you the ability to invite guest to join your conferences. For example, you may want to invite a customer or a vendor to a VidyoConference. If your invited guests don't have VidyoDesktop installed on their computers, they'll be prompted to download it the first time they're invited to a conference.

Guest users have these limitations:

- They can only join conferences; they cannot start them.

- They can neither make direct calls nor can they receive them.
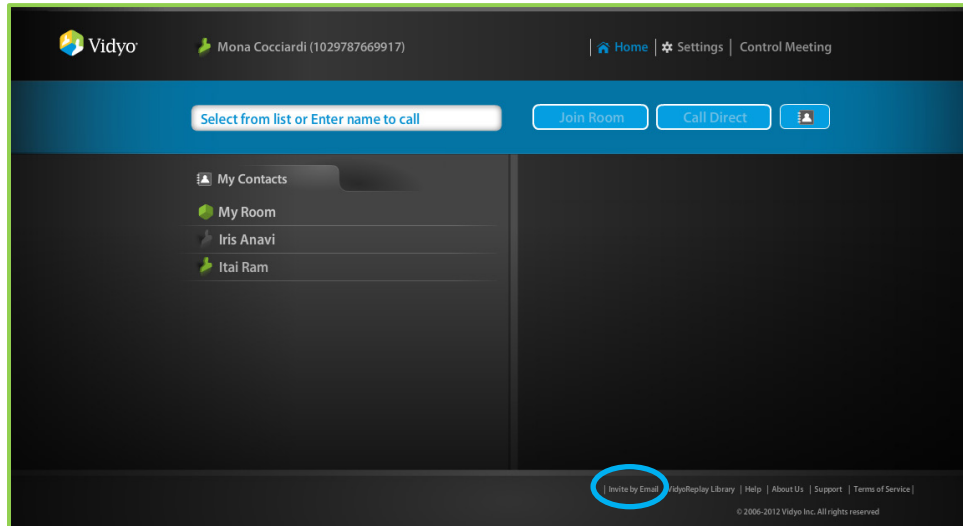
To invite guests to your conference using the VidyoPortal home page, simply click the **Invite by Email** link at the bottom right of the page. When you click this link, your default email program opens with a prewritten message (in the system language that is set by your Administrator) inviting the recipient(s) to join your room. This is the message:

> *Hello,*
>
> *You have been invited to attend a VidyoConference taking place in virtual meeting room: [DISPLAYNAME] at [TENANTURL] [PIN]*
>
> *To join as a Guest, please click on this link: [ROOMLINK]*
>
> *To join from a telephone using VidyoVoice, dial this number: [DIALSTRING]*
>
> *To call using IPC, enter [ROOMNAME]@[TENANTURL] on the VidyoPortal home page, and click Join. [PIN]*
>
> *IMPORTANT: Any video, audio and/or materials viewed during this conference may be recorded. By joining, you consent to (i) such recording; and (ii) the later viewing of the recording by others at the discretion of the host. If you do not consent, discuss with the meeting host prior to the start of the recording or do not join the session. Note that any such recording may be subject to litigation-related discovery.*

If you are a first time user, please review our Quick Guest Guide before the call:
Windows: [WINDOWS_GUIDE]
Mac: [MAC_GUIDE]

Need help getting started? Check out the Vidyo Knowledge Center at
http://www.vidyo.com/knowledge-center/

Your message may look slightly different depending on whether or not your Administrator edited it. Some common changes to the message that your Administrator may have already made include the following:

- If your organization doesn't use VidyoVoice, the line about using VidyoVoice may have been deleted.

- If your organization uses more than one VidyoVoice number, your Administrator may have added the additional number(s).

- If your organization doesn't use IPC, the line about using IPC may have been deleted. (For more information about IPC, see the *Placing an Inter-Portal Communication (IPC) Call* section on page **21**.)

You can also edit the message yourself. For example, you might want to include:

- The time of your meeting. The time may appear automatically in the message header if you set up the meeting using your online Calendar feature. If not, you can include it in the Subject line of the email or in the body of the message.

- Additional information about the meeting, such as the purpose of the meeting, special requests, and so forth.

Keep in mind that due to some browsers' limitations, the message cannot contain more than 1300 characters.

Once the message appears the way you like it, you can email it to one or more guests.

Note: If you are using an Asian language and Microsoft Outlook, perform the following steps in Outlook for the invite text to appear properly:

1. Select **Options** from the Tools menu.

2. Select the Mail Format tab.

3. Select **International Options**.

4. Select **Enable UTF-8 support for mailto protocol** if it is not selected.

USING THE HOME PAGE INFORMATIONAL LINKS

Besides the **Invite by Email** link, there are some other links at the bottom right of the VidyoPortal home page. These links provide the following functionality:

- **Help** — Displays this *VidyoDesktop User Guide* in a new browser tab or window.

- **About Us** — Displays information about Vidyo, Inc. and its videoconferencing technology. This information can be edited by an Administrator. (If your organization is a customer of one of our resellers, you'll see their information instead.)

- **Contact Us** — Displays information about contacting Vidyo by phone, fax and email. This information can be edited by an Administrator. Instead of information on Vidyo, it might have information on contacting your conferencing service provider or your organization's help desk.

- **Terms of Service** — Displays the Vidyo End User License Agreement including Limited Warranty and Disclaimer of Warranty.

5. Using VidyoDesktop During a Meeting

When you join a meeting room or call direct from your VidyoPortal home page, you might briefly see a progress bar and then VidyoDesktop launches.

If someone calls you directly, you receive a prompt through the VidyoDesktop indicating who is calling and providing buttons that enable you to accept or decline the call.

Once your call or meeting is in session, you can control the audio/video streams, share applications running on your computer with the other call participants, and perform other actions as described in this chapter.

Note: Your Administrator can configure VidyoDesktop to run in secure SSL mode. This secure method of connecting prevents unauthorized persons from electronically eavesdropping on your VidyoConferences. If your VidyoDesktop has been configured to use SSL, you see a small lock icon in the lower right corner of the screen, as shown below.
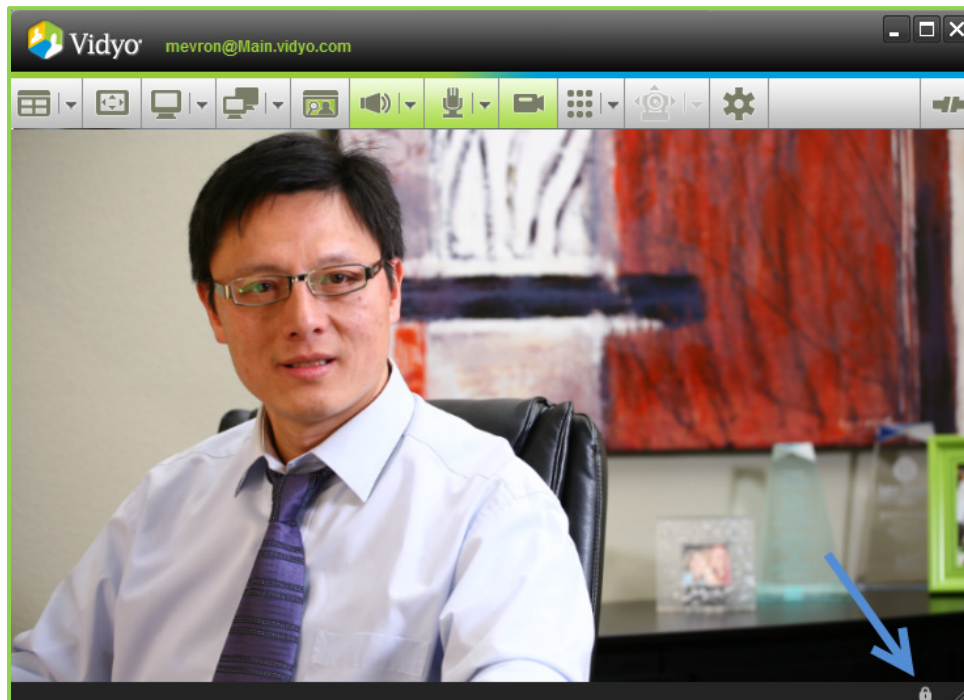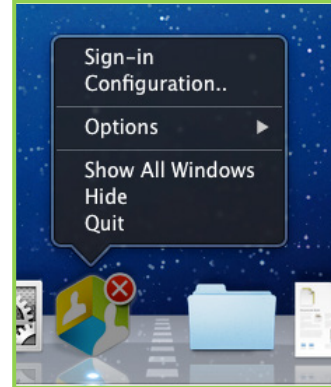
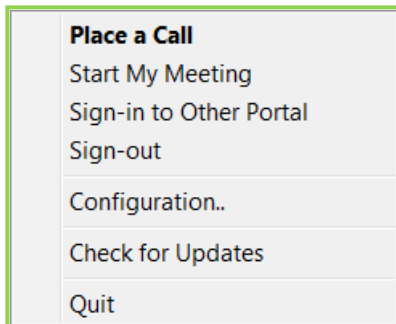## STARTING A VIDYOCONFERENCE USING THE VIDYODESKTOP

You can start a VidyoConference by right-clicking the VidyoDesktop icon in the Notification area (system tray) on a Windows PC or by control-clicking it in the dock on the Apple Macintosh.
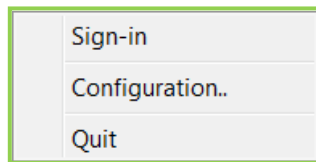
Windows Context Menu—not signed in   Macintosh Context Menu—not signed in
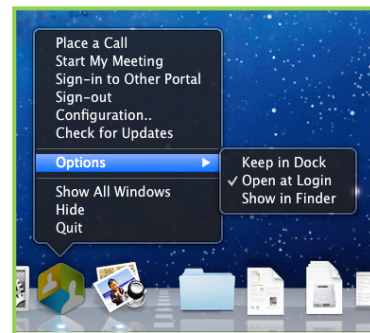
Once you're signed in, more options appear.


Windows Context Menu—signed in   Macintosh Context Menu —signed in

You then have the following menu choices:

- **Place a Call** — Logs you into the VidyoPortal to place a direct call to an available user or participate in a meeting.

- **Start My Meeting** — Launches the VidyoDesktop and puts you in your meeting room.

- **Sign-in to Other Portal** — Signs you out of the VidyoPortal you're using and displays a screen in which to sign into another VidyoPortal to which you have access. Enter the URL of the VidyoPortal or select the VidyoPortal from the drop-down list, then enter your user name and password. Click **Sign-in** to enter the VidyoPortal.
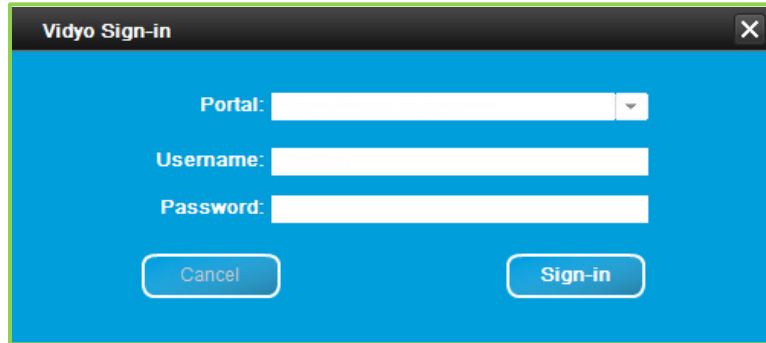
- **Sign-out** — Signs you out of the VidyoPortal you've been using but keeps the VidyoDesktop program open. To resume VidyoConferencing, you must sign in again. This is different from signing out in the VidyoPortal home page, which allows you to start a conference with the VidyoDesktop without logging in again.

- **Configuration** — Opens the VidyoDesktop Configuration and Status page so you can change settings. For information, see *Using the Configuration and Status Page* section on page **39**.

- **Check for Updates** – This option allows you to check for updates without waiting for the system to prompt you.

- **Quit** — Closes the VidyoDesktop program.

On the Macintosh, you can also select Options that are standard for Mac apps.

- **Keep in Dock**

- **Open at Login**

- **Show in Finder**

Note – We're continually improving the VidyoDesktop program. When we do make an improvement we make it available to our customers right away. If your system Administrator adds the latest version to your system, the next time you start VidyoDesktop, you may see a notification box that you that you need to upgrade the VidyoDesktop software. You won't be able to sign in until you allow the upgrade. It takes only a few moments and you don't have to restart your computer when it's done. The upgrade notice may also pop up when you're in the middle of a direct call or conference. In that case, you can postpone the upgrade until after you're finished.
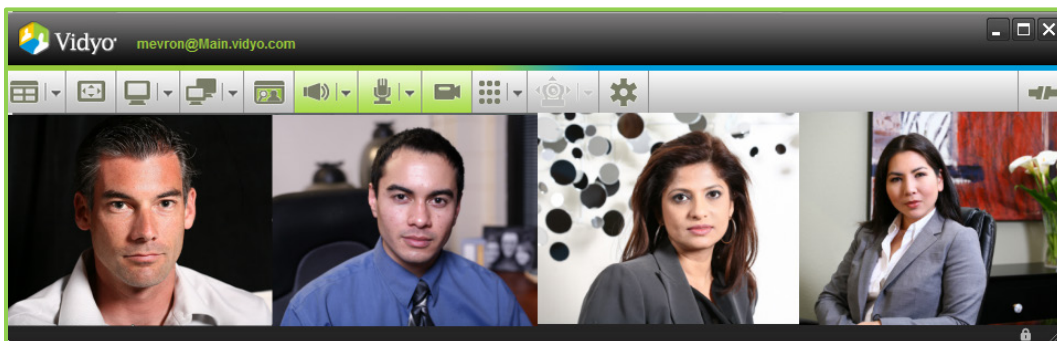
USING THE VIDYODESKTOP TOOLBAR

The VidyoDesktop window first opens in Picture-in-Picture mode (PiP). Picture-in-Picture mode displays your image as a thumbnail in the lower right corner. This is the default. However, if you turn picture-in-picture off

during a call or conference and leave it off when you conclude the call, VidyoDesktop will not open up in PiP mode the next time you start it. In other words, it remembers your setting from your last call.

Likewise, if you have selected **Start Conference in Full-screen** in the Configuration and Status window under Options, you'll start in full screen.
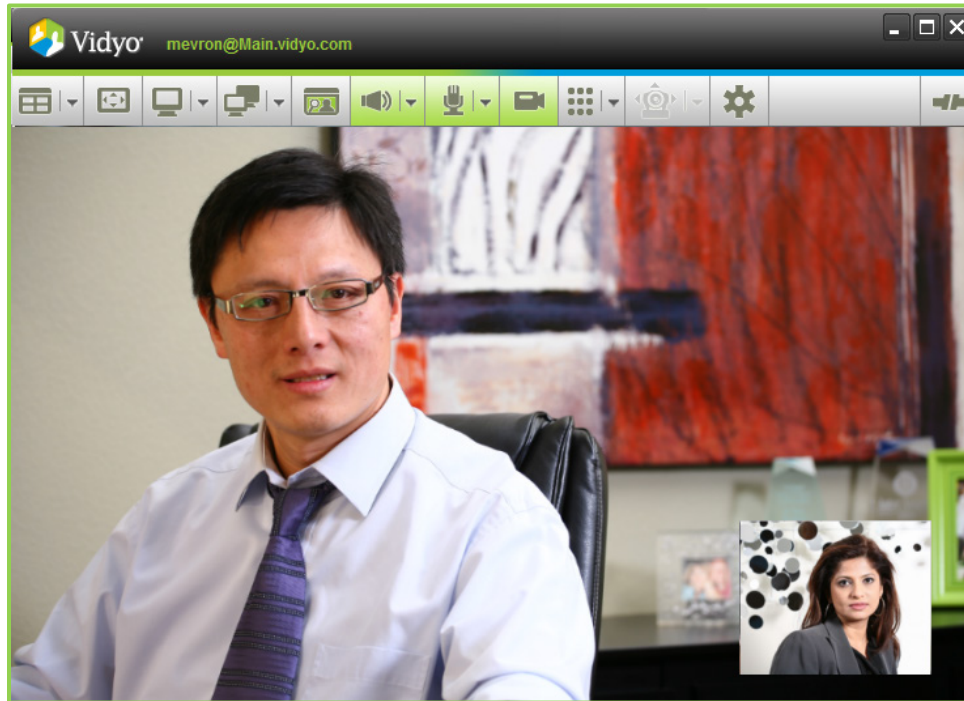
You can resize the VidyoDesktop window and change display modes to create an optimal viewing experience. The toolbar across the top of the window features button controls. Some buttons allow you to toggle between actions, and others have drop-down arrows beside them that offer more options.
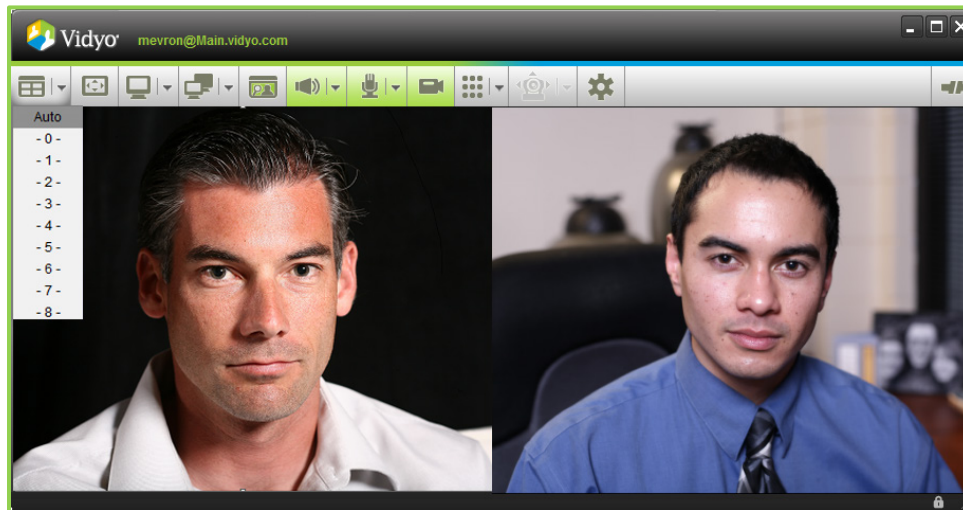

Layout

The **Layout** button on the VidyoDesktop toolbar enables you to control the layout of your VidyoConference.

No more than eight remote parties can be displayed at once (the eight are chosen by the last active speakers based on their voice activity). By clicking the dropdown menu near the **Layout** button, you can choose the number of participants you want to see (thereby overriding the default Auto mode). You can select a number in the 0-8 range (when you select **0,** none of the participants are displayed).

Clicking on the **Layout** button itself changes the screen to Preferred mode, in which the person who is speaking has the largest screen real estate. In Preferred mode, the participant shown in the largest screen area changes as the active speaker changes. Preferred mode is also automatically activated when a participant shares an application.

You can also stretch and resize the VidyoDesktop window to change the size and presentation of the layout.


Keep the following in mind when changing the layout:

- In a direct (point-to-point) call, the range of screens will be 0-3 since you can turn on Self-View and you or your counterpart can share an application on your computer.

- In a multipoint call, the maximum number of displayed participants might be lower than 8 (even if there are more than 8 remote participants) if there isn't enough available network bandwidth.

- The number of displayed screens can total up to 10 if you are using Self-View and viewing a document share.

- You can display a thumbnail image of yourself in the lower right corner of the screen by clicking the **Self-View** button once. Click a second time to view yourself and the other participant. By clicking a third time, you can view the other participant only.

- Remember, while the default is set to always start in the Picture-in-Picture style of the Self-View mode, if you'd prefer not to, just make sure you turn it off before you end a call or conference and VidyoDesktop will remember that Self-View was off and start with it off next time.

Full Screen

Clicking on the **Full Screen** button [icon] toggles the screen between sizing the window to utilize the entire screen real estate and restoring the window to the previous size. When in Full Screen mode, the toolbar hides itself after a few seconds. If you move your mouse even a little the tool bar will reappear. (Alternatively, you can choose to have the toolbar displayed even when you're in Full Screen mode as described in the *Configuring Optional Settings* section on page **48**.)
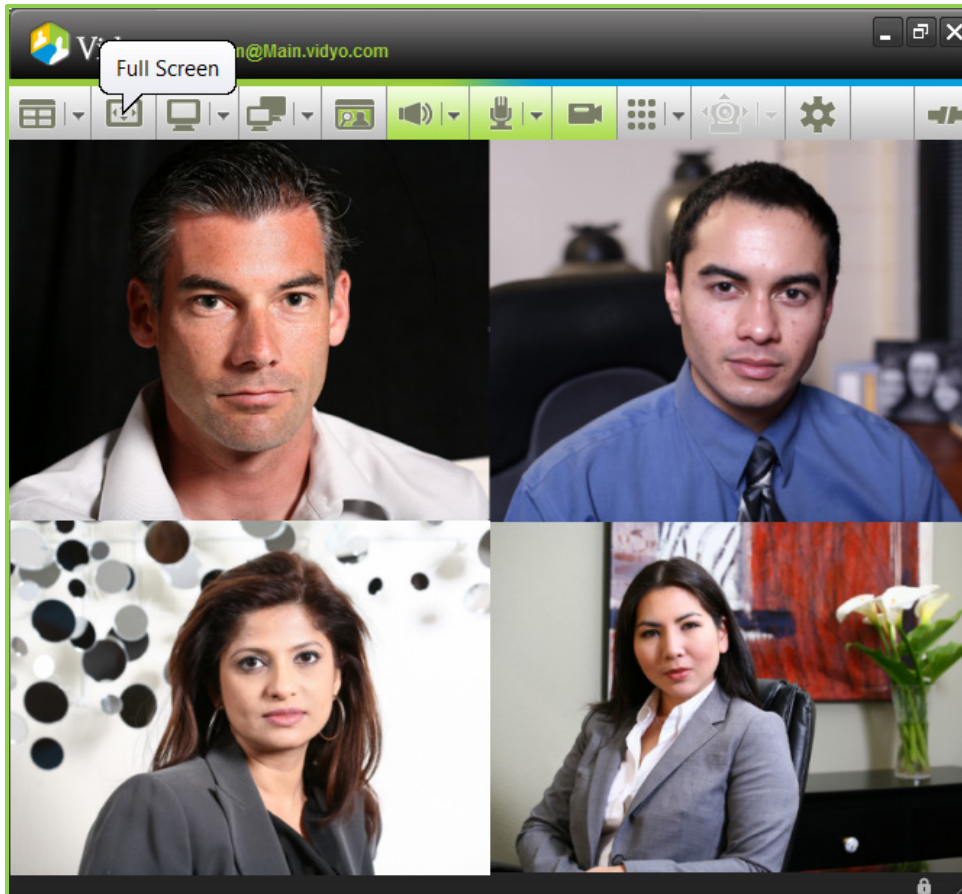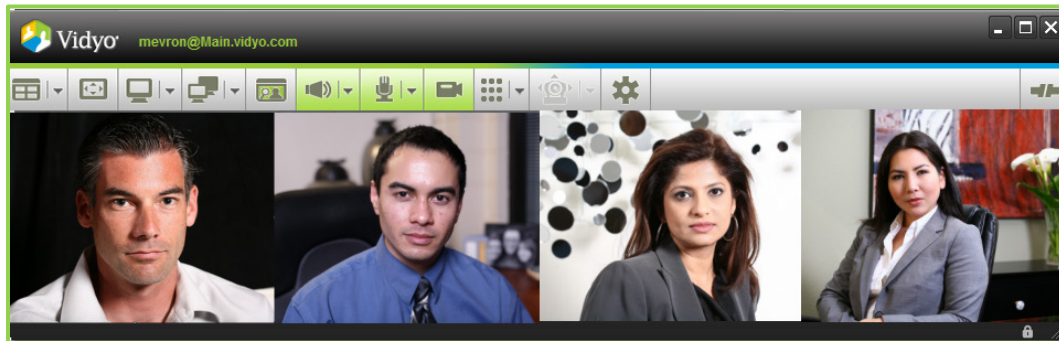

Share

Participants can share applications on their computers by clicking the **Share** button [icon]. Clicking the button itself toggles between sharing and stopping the share. Click the drop-down arrow to select which application to share from the open applications on your computer. You can also choose to share your entire desktop by selecting your display from the share list (Windows only). When you first share an application or screen, the VidyoDesktop shrinks to enable you to view the shared application. You can resize the Vidyo-Desktop, as desired.

You can see the screen with your shared application by clicking the **Toggle** button next to the **Share** button and choosing your name from the list. If you choose not to view your shared application, you know you are sharing because the Share icon is green.

Note: To more easily view shared presentations and documents on-screen, set your layout to preferred mode or to o (zero). You'll see only the shared application.

When another participant is sharing an application, it will show on the VidyoDesktop window. When layout is set to Preferred mode, the shared application appears largest. You may undock the shared screen (i.e., view it as a separate window) and re-dock the shared screen (i.e., snap it back into the main VidyoDesktop window) by double-clicking the contents of the application window.

Here is an example of a shared application that is docked:
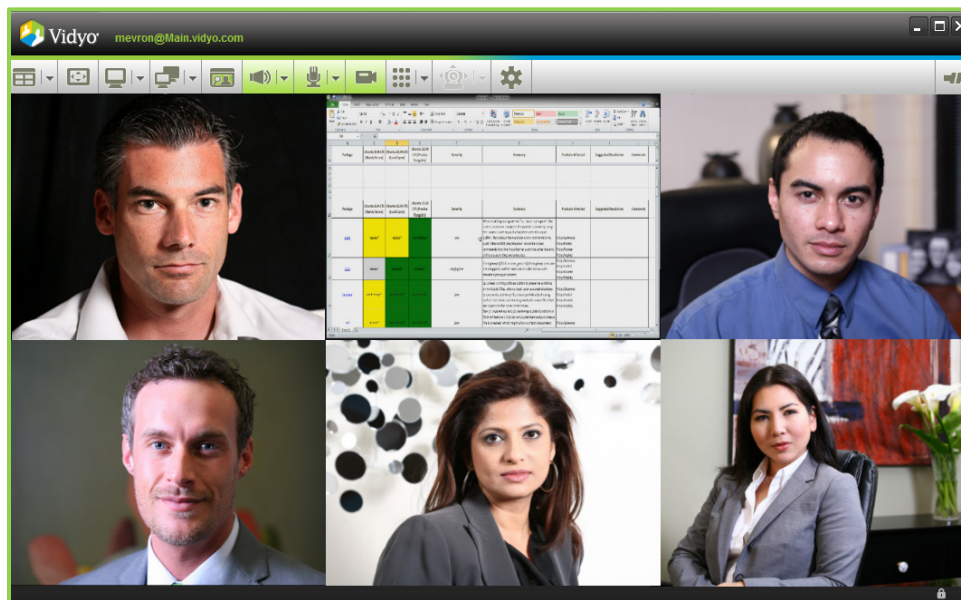
Here is an example of a shared application that is undocked:
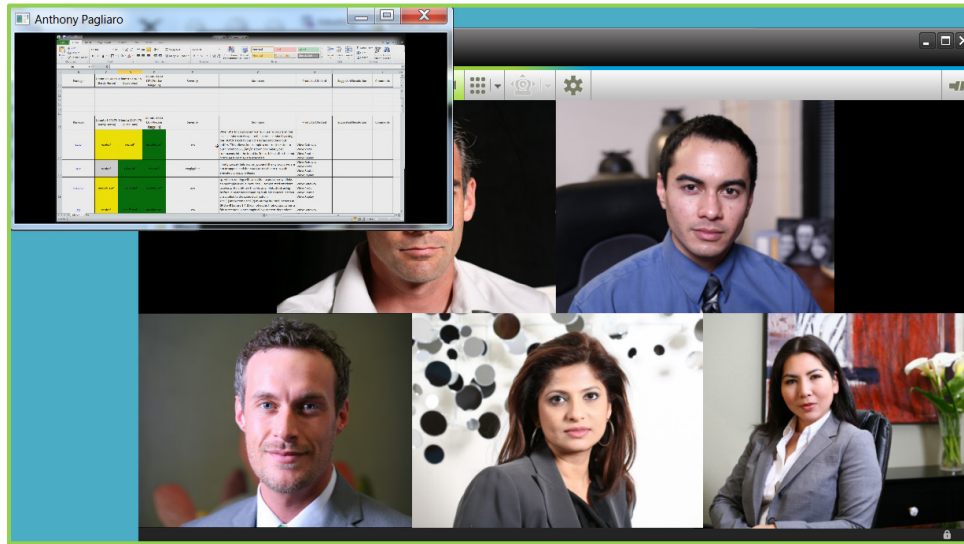
Toggle

Although more than one participant can share what's on their computer screens (like a PowerPoint slide, a spreadsheet, a Web page and so on), you can view only one shared screen at a time. When shared applica-

tions are available from multiple participants, the **Toggle** button turns green, indicating a share is available. You can toggle between multiple shared applications using the **Toggle** button. Click the button to cycle through the available shares.

When you click the **Toggle** button, you'll see a list of the people who are currently sharing their screens and you can choose the person whose share you want to view. If you are sharing your screen, you'll see your own name on the list as well. Click the dropdown arrow to select a specific share from all available shared applications, including yours. The first option in the dropdown is always **None**. Selecting **None** means that you will not see any shared applications in the VidyoDesktop window.
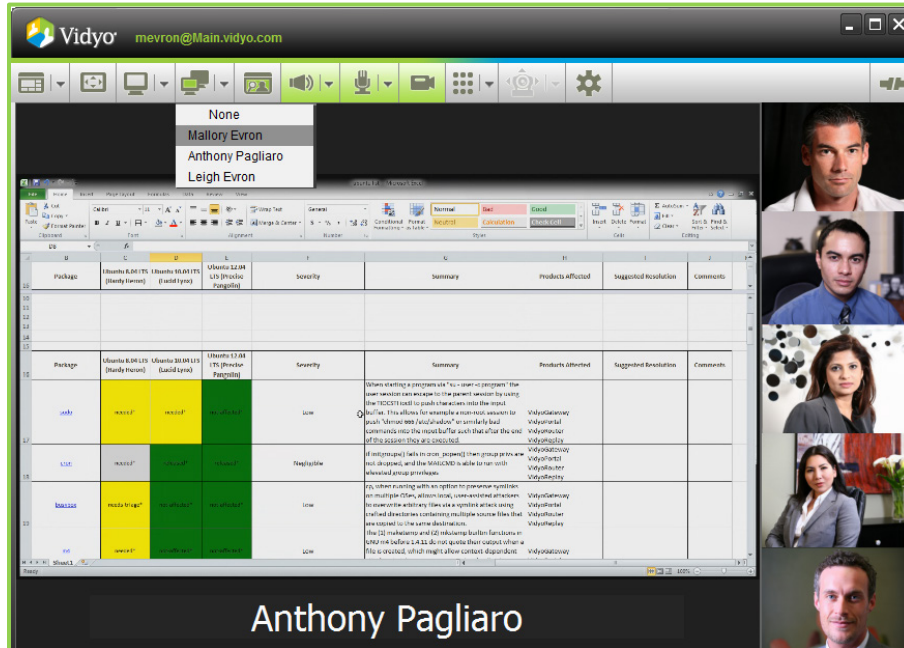
Self-View

You can view your own video feed in "Picture-in-Picture" mode by clicking the **Self-View** button. Your video appears as a thumbnail image in the lower right corner of the screen. Click the **Self-View** button a second time to see your image the same size as others on the screen layout. For example, if you're in a direct call, the screen will split in half and you'll see the person you're talking to on the left hand side and yourself on the right. Click the **Self-View** button a third time to remove yourself from the layout and view only the other meeting participant. The system remembers which mode you were in when you finished your last call and starts the next call the same way.
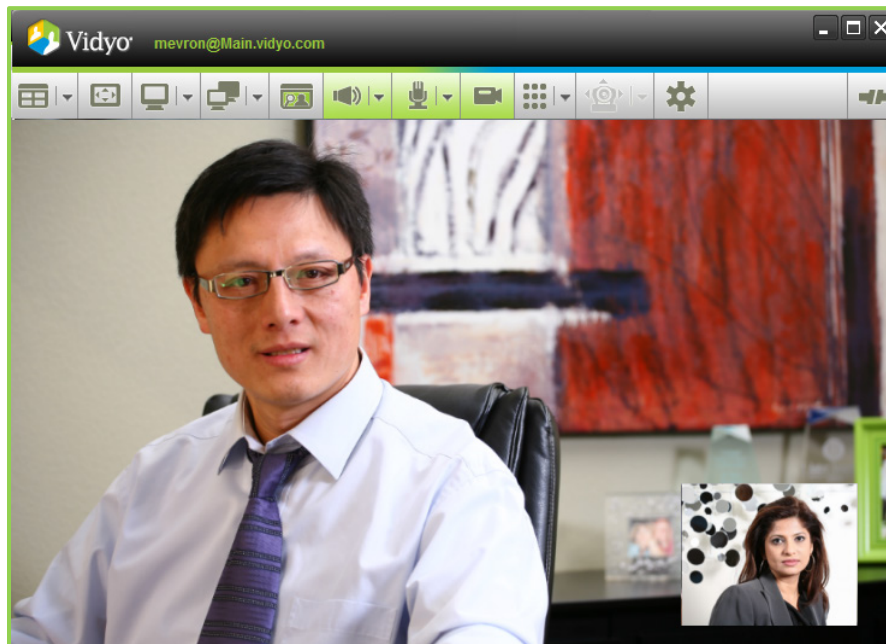
Volume

Click the **Volume** button to mute/unmute the sound you're hearing. The button turns red when mute is on. You can also use the dropdown arrow to change the volume level. You'll see a slider and a green line whose vertical movement reflects the volume level your speakers or headphones are outputting.

Microphone

Click on the **Microphone** button to mute/unmute the sound you're broadcasting. You can also use the dropdown arrow to change the volume level. You'll see a slider and a green line whose vertical move-ment reflects the volume level your microphone is outputting.

Icon	Description
	The button turns red when you mute yourself, and a small red circle with a line through it appears under the microphone icon.
	When the room owner mutes you, the **Microphone** button turns red and a red line appears over the microphone icon.
	When you mute yourself and the room owner also mutes you, the **Microphone** button turns red, you see a red line over the microphone icon, and a small red circle with a line through it under the microphone icon.

Privacy

Click on the **Privacy** button to stop the video you're sending (this is also known as privacy mode). You stay on the call but other participants will not be able to see you. If you are showing a document, it will continue to be visible.

Icon	Description
	The **Privacy** button turns red when you put yourself in privacy mode, and a small red circle with a line through it appears under the camera icon.
	When the room owner or Admin puts you in privacy mode, the **Privacy** button turns red and a red line appears over the camera icon.
	When you put yourself in privacy and the room owner or Admin also puts you in privacy mode, the **Privacy** button turns red; you see a red line over the camera icon and a small red circle with a line through it under the camera icon.

Dialpad

When you connect to a legacy videoconferencing system or MCU, the grayed out **Dialpad** button becomes active. Click this button to display a DTMF (Dual Tone Multi-Frequency) dialpad (like a telephone keypad) that enables you to select menu items to access the legacy system.

Far End Camera Control

The **Far End Camera Control** button allows you to control the motion of a VidyoRoom's camera. It is available for Windows and Mac.

These are the other two requirements for FECC:

- The camera in the room must be powered to enable motion. This kind of camera is often referred to as PTZ (pan, tilt, zoom) camera.

- The room must be configured to allow FECC.

If the requirements are met, the previously dimmed **FECC** button will become active as shown above. If you click the dropdown arrow next to the button and see multiple cameras listed, you can choose and switch among them. (A VidyoRoom can have only one camera so you are actually choosing between different VidyoRooms.)

Once you've chosen a camera, the Remote Camera Control panel will open. You can pan (move side to side) and tilt (up and down) the camera in addition to zooming in and out.

To stop using Far End Camera Control, simply click the **FECC** button again.
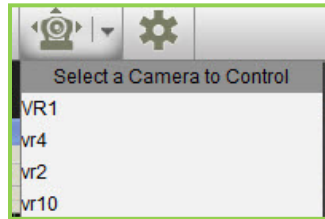
Configuration

Click the **Configuration** button to configure your VidyoDesktop and access other VidyoDesktop pages, including Status, Attendees, Network, Devices, Video, Options, and About. The **Configuration** button

turns red when there is an alarm, indicating that your settings need attention. For more information about the settings available through the Configuration button, refer to the *Using the Configuration and Status Page* section on page 39.

You can also access the configuration settings at any time by right-clicking the VidyoDesktop taskbar icon

 and choosing **Configuration** from the pop-up menu. All changes take place immediately.

Disconnect

Clicking the **Disconnect** button immediately disconnects you from any call or conference you're in. When you disconnect from a direct call, you'll see a dialog box indicating that the call has ended.

USING THE CONFIGURATION AND STATUS PAGE

Clicking the **Configuration** button ⚙ on the VidyoDesktop toolbar opens the Configuration and Status page. The tabs on the left side of the page allow you to configure various aspects of your VidyoDesktop or check the status of various settings.

This is what the Configuration and Status page looks like in Windows 7:
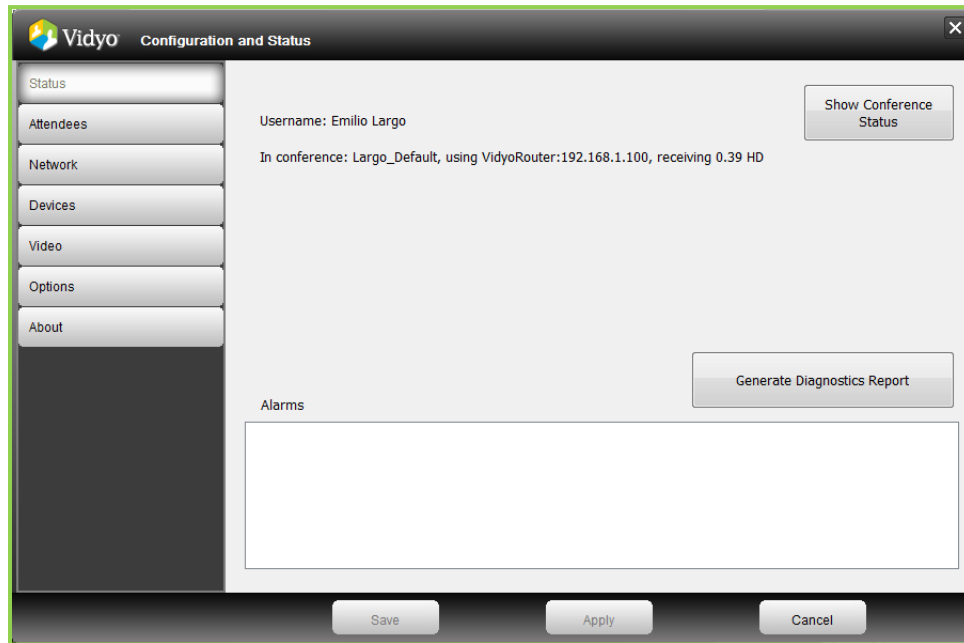
This is what the Configuration and Status page looks like in Mac OS Lion:
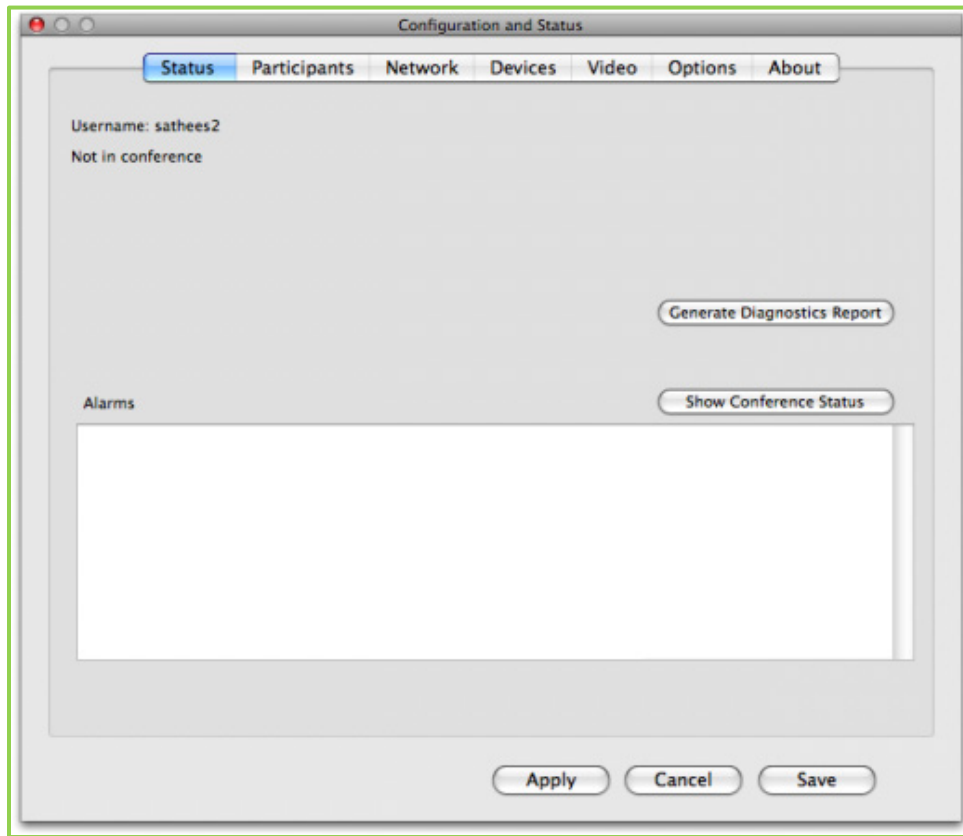
Generating a Diagnostics Report (Windows and Mac Only)

You may wish to generate a diagnostics report for submission to customer support.

To generate a diagnostics report:

1. Click **Generate Diagnostics Report**.

   All the current VidyoDesktop log files and the diagnostic report are put into a single .zip file on the desktop which you can send to customer service for further diagnosis.

Checking Your Status

The Status tab indicates whether or not you're in a conference, with whom, which VidyoRouter™ you're using (which your system Administrator might want to know if you're reporting any difficulties), and the bandwidth you're using.

It also features a display of any alarms, which may include ***High CPU utilization limits quality of conference***. If you see this alarm, it means that CPU utilization has been elevated for an extended period of time. You should try quitting applications other than VidyoDesktop. If the problem persists:

- If you are using a camera with a USB connection, make sure the camera is plugged directly into the computer and not to a USB port or docking station.

- If you are using a notebook, verify that power management is set for high CPU performance.

- Make sure the camera being used has been updated with the latest drivers available for it.

- Make sure that your computer meets the minimum or recommended configuration for running VidyoDesktop.

Viewing the List of Attendees

The Attendees tab shows the list of participants in the conference.

Note: If you see small boxes instead of understandable text in the participants list, the user's name is written in a foreign language font that is not installed on your computer.
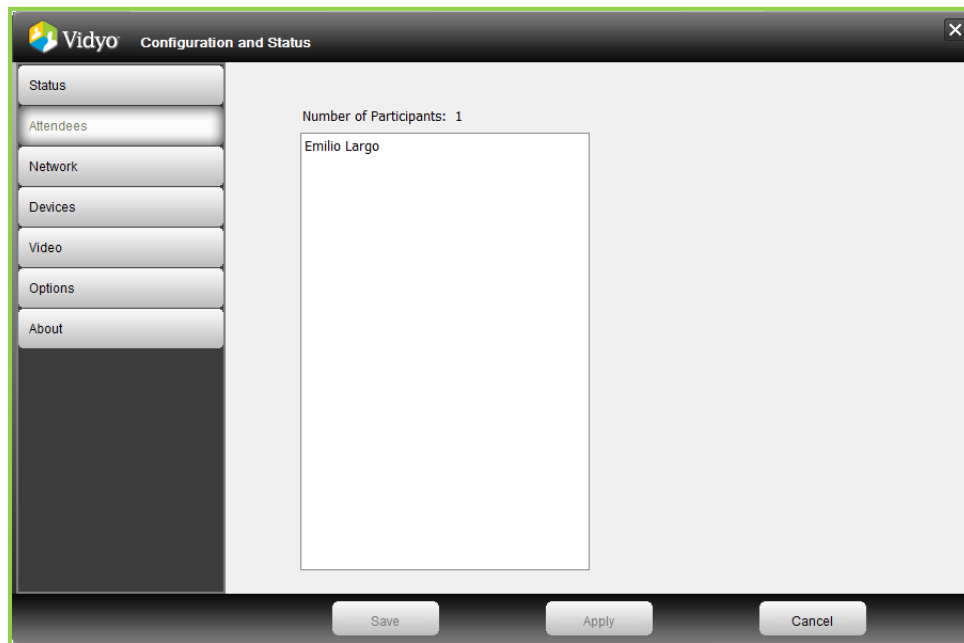
Viewing Network Information

The Network tab enables you to view network information.

This section contains technical information which, for the most part, you need not concern yourself with when using VidyoDesktop. Feel free to skip it for now. You may be asked by your system Administrator, help desk, or Vidyo Customer Support to read off what this tab says and make any changes that might be necessary.
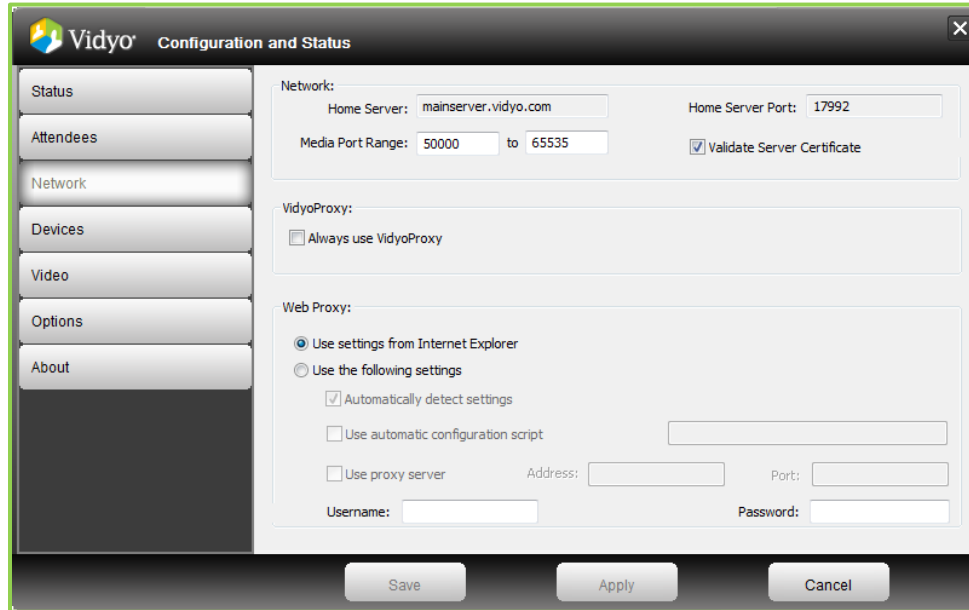
Network

In the Network section of the Network tab:

- ■ Do not change the numbers in the Media Port Range field unless directed to by your Administrator or other technical support person.

- ■ Do not change the Validate Server Certificate checkbox setting unless directed to by your Administrator or other technical support person.

VidyoProxy

The VidyoProxy™ section of the Network tab is used to configure the VidyoDesktop to operate behind firewalls, NATs, and Web Proxies that limit traffic to specific ports and protocols—commonly port 80 for https and port 443 for https. This tab shows the home server and port used.

Note: The VidyoDesktop supports basic and NTLM (NT LAN Manager) authentication.

A VidyoProxy address is typically provided by the server if the server is configured to support NAT and firewall traversal. If a VidyoProxy address is available to the VidyoDesktop, the VidyoDesktop first tries to connect directly to the server. If that fails, it retries using the VidyoProxy as mediator and traversing the firewall/NAT on specific TCP ports.

Selecting the **Always use VidyoProxy** checkbox forces the VidyoDesktop client to use the VidyoProxy if one is available. If set and if the VidyoDesktop finds a VidyoProxy address, it immediately tries to use it without first trying to connect directly.

The VidyoProxy can be used as fallback mechanism in case direct access to the server isn't available. By default, the VidyoProxy is used if a direct connection cannot be established. Do not change this setting unless advised by your Vidyo Administrator.

If the server is configured to support NAT and firewall traversal, a VidyoProxy address is provided by the server.

Web Proxy

If your network requires the traversal of a Web Proxy, configure one of the Web Proxy options in the Web Proxy section of the Network tab. You can configure Web Proxy settings from inside VidyoDesktop or from inside Internet Explorer. To access the server through a Web Proxy, the VidyoProxy must be used.

To configure Web Proxy settings from inside VidyoDesktop:

1. From the Network tab, select the **Use the following settings** radio button.
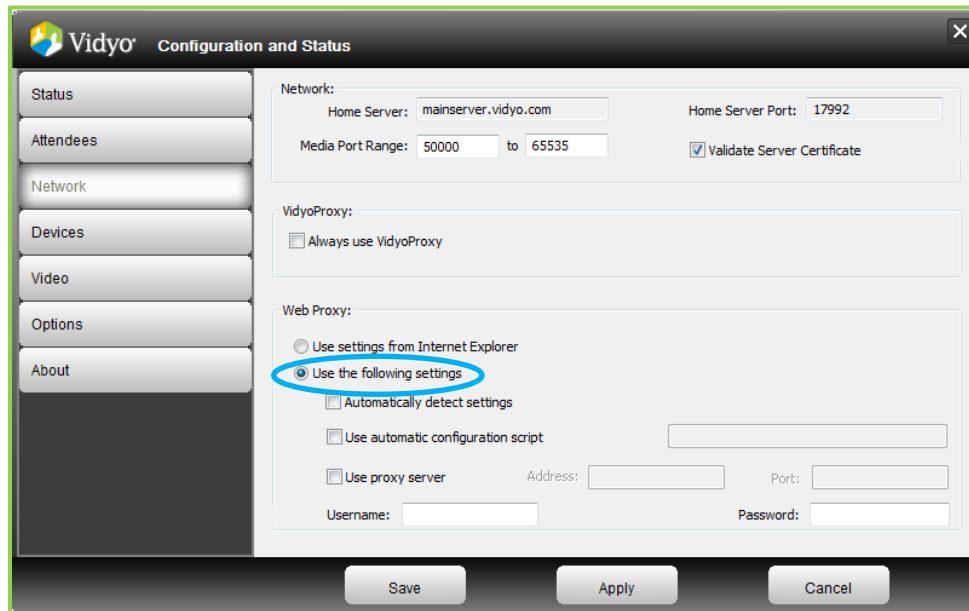
The three checkboxes are then enabled.

2. Select one of the following checkboxes as desired:

    ▪ Automatically detect settings.

        If a Web Proxy is not necessary, auto detection is used when setting up the connection to the server. This may be useful for users who are traveling or users who conference from both office and home.

    ▪ Use automatic configuration script.

        On Mac OS, Web Proxy settings are retrieved from your network interface settings. Therefore, to use these settings on a Mac, select this checkbox.

    ▪ Use proxy server.

        When you select this checkbox, you must specify the Address, Port, Username, and Password.

Please note the following:

    ▪ If the web-proxy supports Integrated Windows authentication via the Microsoft Negotiate authentication scheme, a Windows user may leave the Username and Password fields empty. When no username and password are provided, VidyoDesktop can use the current Windows user logon information to authenticate against the web-proxy.

■ The Username and Password fields are functional regardless of whether Use Settings from Internet Explorer or Use the following settings is selected.

To configure Web Proxy settings from inside Internet Explorer:

1. Launch Internet Explorer and make your Web Proxy Settings as desired under Tools › Internet Options, and clicking the Connections tab.

2. On the Connections tab, click LAN settings.
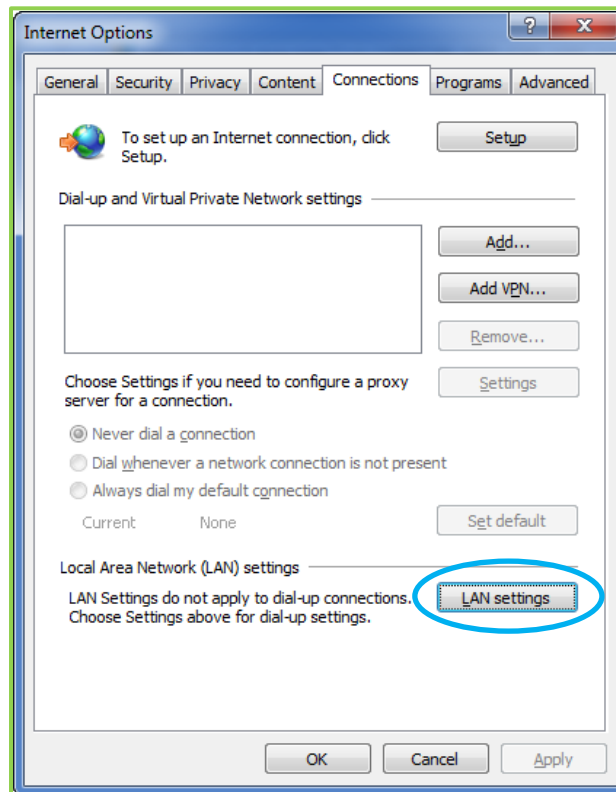
3. Select the **Use a proxy server for your LAN** checkbox and provide the required information.
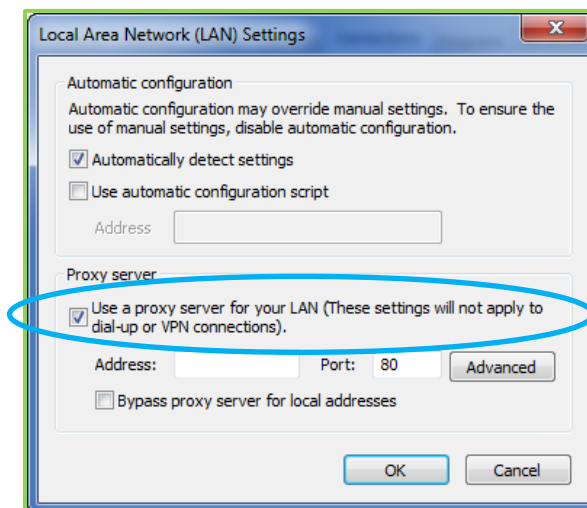
4. Return to VidyoDesktop and select the Network tab.

5. Select the **Use settings from Internet Explorer** radio button in the Web Proxy section of the tab.
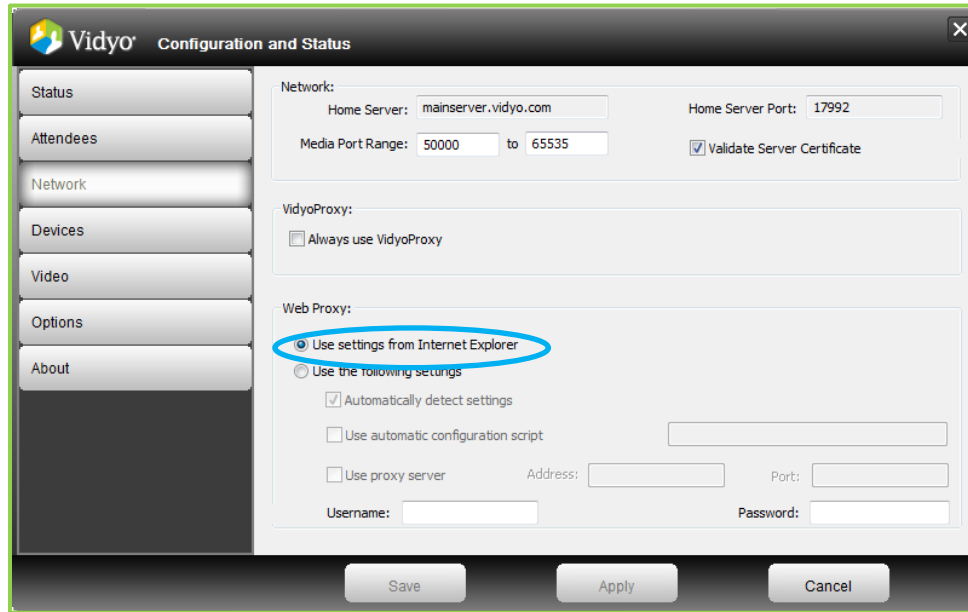
Selecting Which Devices to Use

The Devices tab shows the speaker, microphone, and camera devices available on your computer; however, you will probably rarely need to use this tab. That's because VidyoDesktop comes with *Automatic Device Selection*. This feature enables VidyoDesktop to automatically select the appropriate device based on your past selections.

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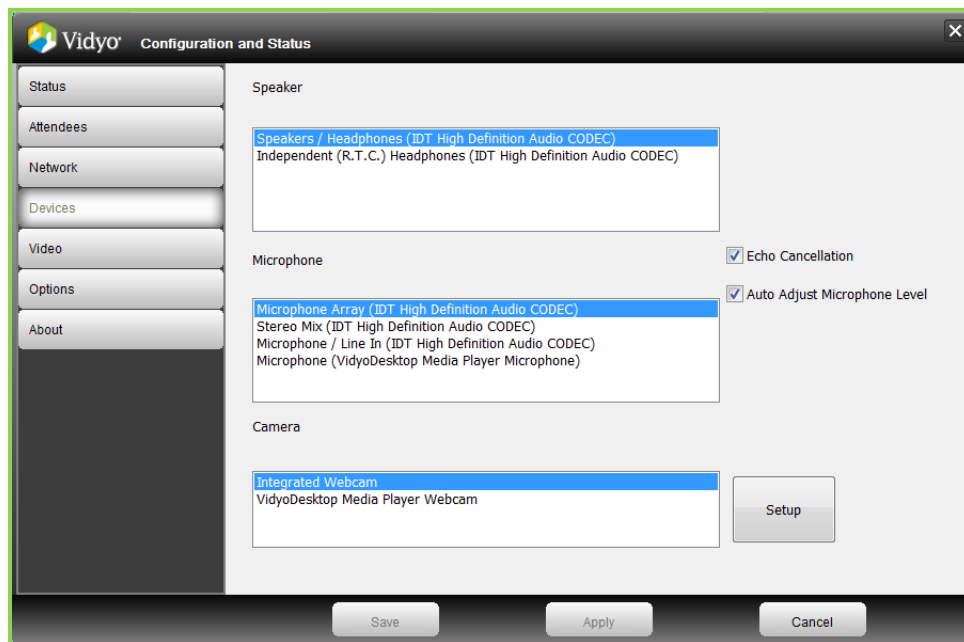
For example, let's say you're working at the office with a laptop that has its own built-in camera. However, your company has invested in better devices, such as the Logitech C910 and a ClearOne Chat 60 speakerphone. VidyoDesktop will automatically select the C910 over your built-in cam. Likewise, it will select the Chat-60 over your built-in audio.

Now let's say you're at home where you use a less expensive Logitech C510 and you use the built-in speaker and microphone in your laptop. When you start up VidyoDesktop on that computer, it won't ask you where the C910 and Chat 60 went. It will automatically select the best devices you have. It remembers what devices are on which machines and chooses the best available. Of course you can always choose devices manually if you want to.

Other occasions when you may want to choose a device manually include:

■ If you want to make a change to your audio or video device while a call is in progress. The change will take place immediately, without having to restart the VidyoDesktop.

■ When you unplug a device. If automatic device selection cannot find an alternative device, you will be asked to select a device manually (if an alternative device is found, a pop-up will appear indicating which device is being used instead).

These two checkboxes are also available on this screen:

■ **Echo Cancellation** – Echo cancellation is turned off when you use an audio device that is recommended by Vidyo because recommended devices have echo cancellation built in. This feature is also known as "Automatic Echo Cancellation" (AEC). When you use an audio device that's not recommended and other meeting participants say they can hear an echo when you talk, you should enable echo cancellation.

• To enable echo cancellation, select the **Echo Cancellation** checkbox on the Devices tab.

• To disable echo cancellation, clear the checkmark from the **Echo Cancellation** checkbox on the Devices tab.

Note: VidyoDesktop warns you if there is too much feedback from the speaker to the microphone for AEC to work properly. If so, you will receive this message: "VidyoDesktop detected loud feedback from speaker to microphone. Please consider moving the speaker away from the microphone, slightly reducing the speaker volume, using a headset or selecting a different audio device."

■ **Auto Adjust Microphone Level** – Normally, if you're using a speakerphone and you turn around as you're talking, the volume of your voice will do down. However, by selecting the **Auto Adjust Microphone Level** checkbox, the microphone level will adjust automatically so your voice won't get louder or fainter as you move closer or farther from the microphone. This feature is known as "Automatic Gain Control" (AGC). If you find that your voice volume is changing, make sure the checkbox is selected. If you're using a headset, you probably won't need to select this checkbox.

The Automatic Device Selection feature also remembers what you selected in the **Echo Cancellation** and **Auto Adjust Microphone Level** checkboxes for each speaker and microphone pair. For example, if you cleared the checkmarks from these checkboxes when you used your office laptop with the Chat 60 speakerphone, VidyoDesktop will remember your selections and will not use echo cancellation nor automatically adjust the microphone level. Likewise, if you selected the **Echo Cancellation** and the **Auto Adjust Microphone Level**

checkboxes when you used your home computer with the built-in microphone and speaker, VidyoDesktop will remember that and will automatically use echo cancellation and adjust the microphone level whenever you use that speaker and microphone pair again.

Configuring Video Preferences

The Video tab applies to the camera configuration and determines how the VidyoDesktop software performs encoding.
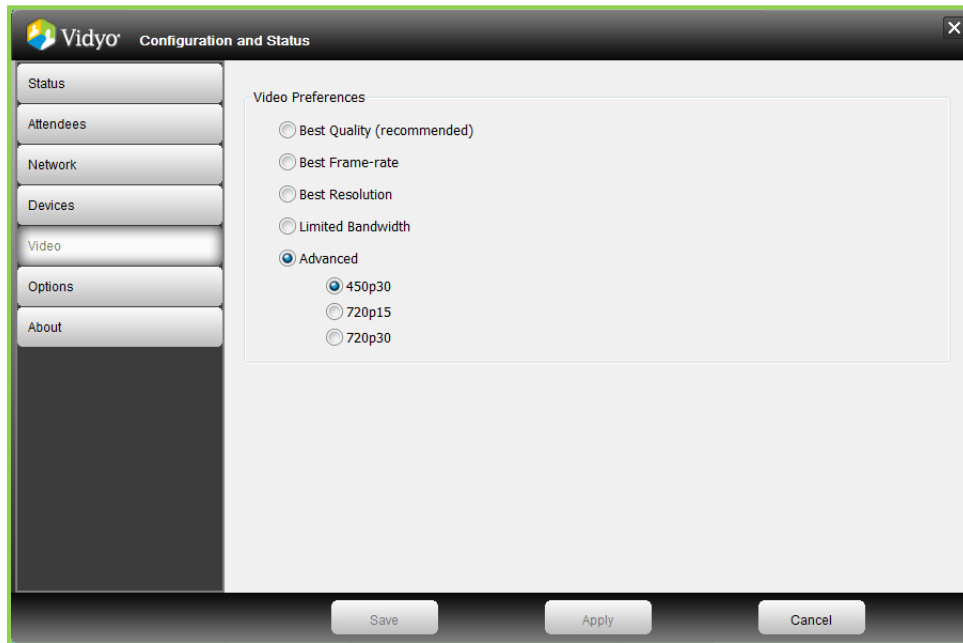
These are the settings available on this tab:

- **Best Quality** – Select this radio button for the best user experience.

- **Best Frame-Rate** – Allows encoding software to encode at 30fps for resolutions higher than VGA. This mode allows for smooth video and is the default video mode.

- **Best Resolution –** Allows encoding software to encode higher resolutions.

- **Limited Bandwidth** - Can be used in bandwidth-limited environments where the full video quality cannot be realized. When selecting this mode, encoding resolution is limited to CIF, thereby conserving uplink bandwidth, and the number of participants that can be viewed is initially limited. If enough downlink bandwidth is detected, the number of received participants will increase with time.

- **Advanced** — (Windows and Macintosh) Advanced mode has three configuration options: 450p30, 720p15, and 720p30. Each forces camera capture, encoding resolution, and frame-rate based solely on what is available from the camera, irrespective of CPU capacity. This mode is for controlled bandwidth environments usage only, so make sure you have enough available bandwidth.

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On high-performance desktops and laptops, such as MacBook Pro models with the Retina display, a new HD Non-Preferred mode supports up to six 720p60 tiles for remote participants. This enables teams of up to six people to enjoy a collaborative telepresence experience without the disruption of active-speaker switching. To choose this mode, select **Advanced** and then select **720p30** as your video preference.

Note: The Advanced mode works properly only when your system meets one of the following minimum hardware requirements:

- Core 2 Duo of 2.8GHz or better WITH DDR3 memory in TriChannel
- Core 2 Quad with DDR2 or DDR3 memory
- i7 based system

Configuring Optional Settings

The Options tab enables you to configure optional settings, such as the language, ringing device, auto answer, and more.

This is what the Options tab on the Configuration and Status page look like in Windows 7:
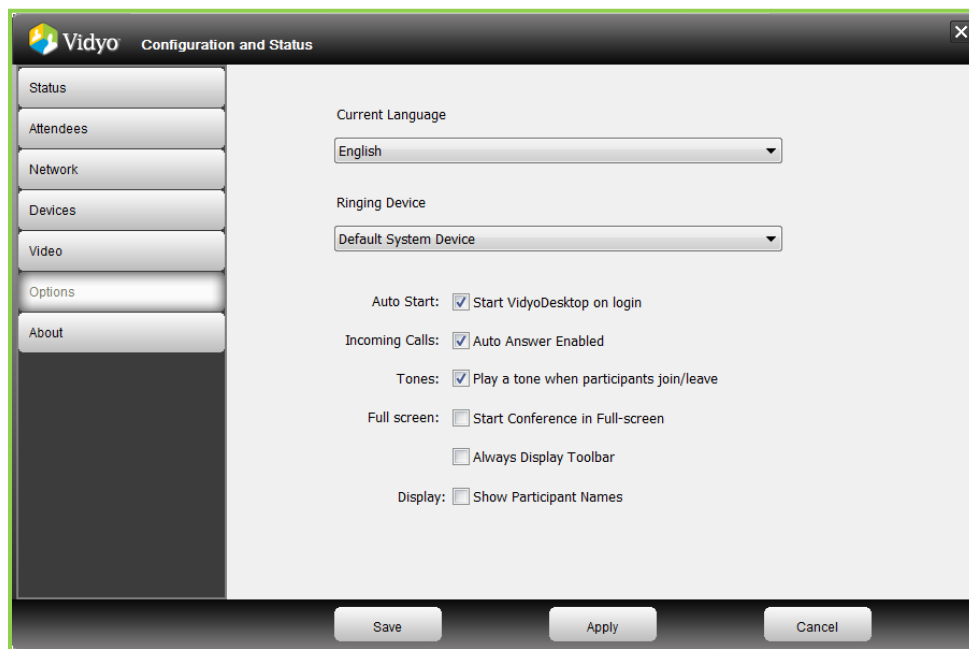
This is what the Options tab on the Configuration and Status page look like in Mac OS X:
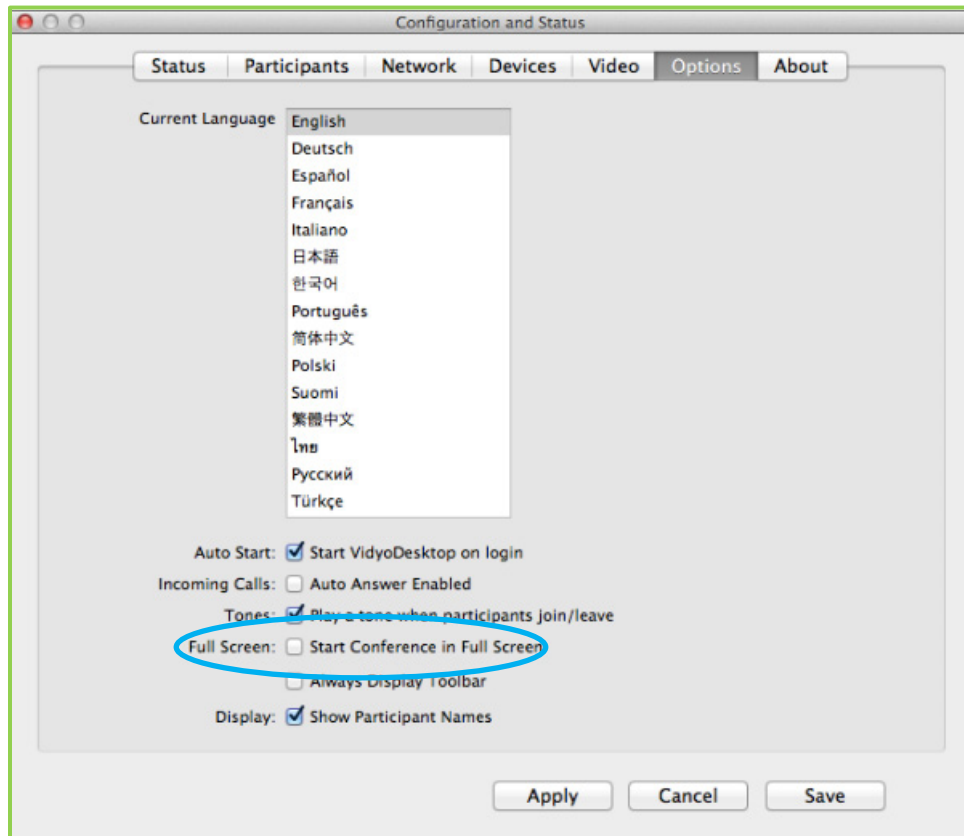

If you've used earlier versions of VidyoDesktop for Macintosh you may notice a new option: Start Conference in Full-screen. If you want to exit full screen mode before the conference ends, just press the **Esc** key on your keyboard.

Changing Your Preferred Language in the VidyoDesktop

A preferred language can be set by you in the VidyoDesktop and by your administrator in the VidyoPortal. The VidyoDesktop inherits the default language set in the VidyoPortal; however, it can be overridden for your current session by selecting a desired language in the VidyoDesktop. This also means the language returns to the default language set in the VidyoPortal when VidyoDesktop is restarted.

See the *Changing Your Preferred Language in the VidyoPortal* on page for more information.

Note: When selecting your preferred language, if you're seeing small boxes or odd characters instead of understandable text for a language name, you don't have the necessary foreign language font installed on your system.

The VidyoDesktop web interface is available in these 15 languages:

- English
- Chinese (Simplified)
- Chinese (Traditional)
- Finnish
- French
- German
- Italian
- Japanese

- Korean
- Polish
- Portuguese
- Russian
- Spanish
- Thai
- Turkish

To change language settings on the VidyoDesktop web interface:

1. Select Options from the left menu of the Configuration and Status screen.

2. Select your preferred language from the Current Language drop down.
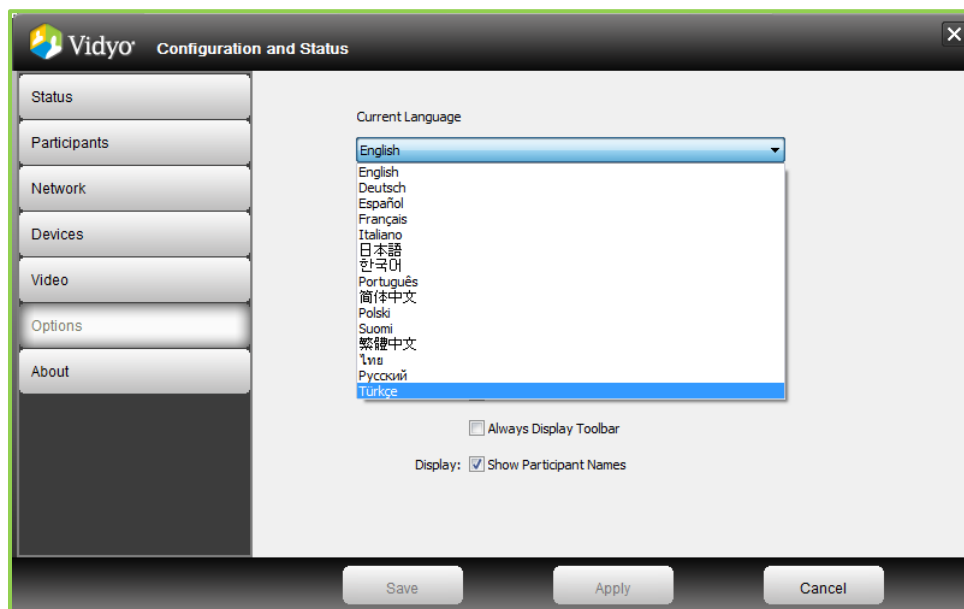
3. Click Save.

Selecting Your Ringing Device

On the Options tab in the Windows version, there's a Ringing Device dropdown menu. Let's say you're listening to music while you work using headphones. You might want to select them as the ringing device so you don't disturb your neighbors. On the other hand if you're going to walk away to talk with a colleague a few cubes away while you leave your headphones plugged in, you would probably want to set your ringing device to your computers speakers, so you won't miss the ring of any incoming calls.

Selecting Other Options

The Options tab provides other checkboxes that enable you to:

- Start the VidyoDesktop when Windows starts (on login).

- Auto-answer incoming calls.

- Play a tone when a participant joins or leaves a meeting.

- Start conferences in full-screen mode.

  This option is available for Windows and, beginning with VidyoPortal version 2.2, for Macintosh. When you've selected this option, VidyoDesktop occupies your entire screen and the menu disappears. Move your mouse pointer near the top of the screen and the menu bar will reappear. Click the **Full Screen** button again to go back to windowed mode.

- Display the Toolbar even in full-screen mode.

  When you've selected this option, VidyoDesktop occupies your entire screen but the menu stays visible.
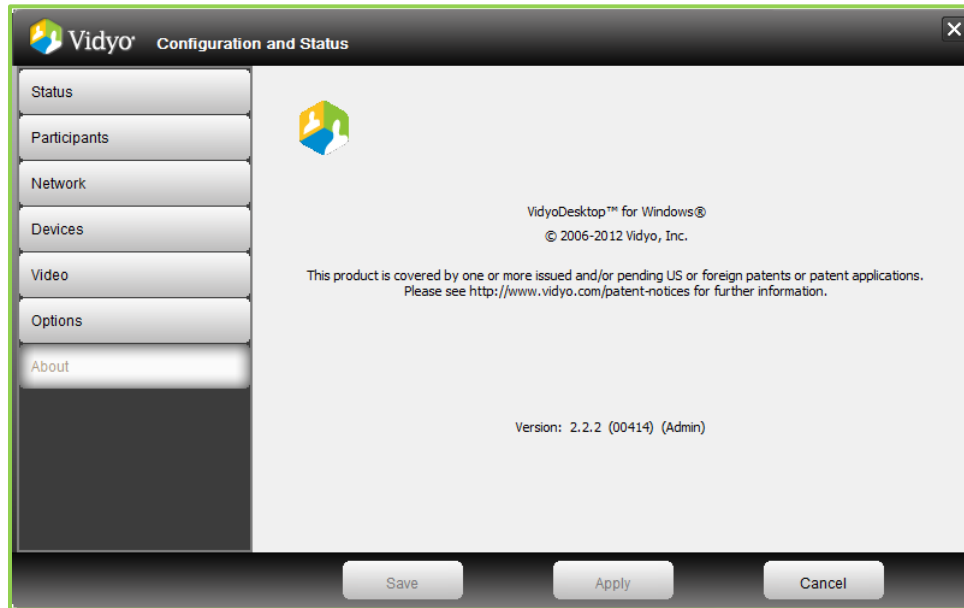
- Show the participant names at the bottom of the VidyoDesktop screen.

  This is especially useful if you're not familiar with some of the participants.
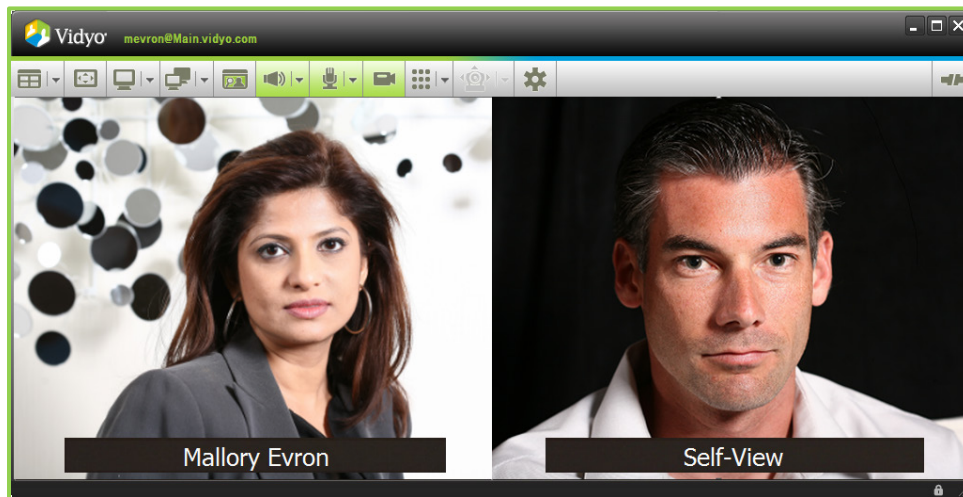
Viewing About Information

The About tab tells you the version number of your VidyoDesktop. You may be asked to provide this information by technical support personnel.
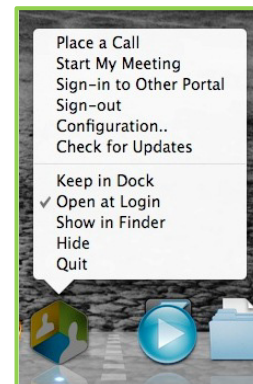

LOGGING OUT

You can sign-out or quit by right clicking on the VidyoDesktop icon in the notification area (also called the system tray) in Windows or simply clicking the VidyoDesktop icon in the dock in Mac OS. In this version LDAP users can now also use the Context menu.
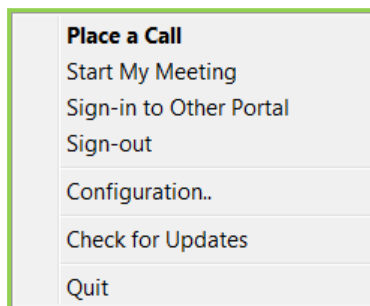
Windows Context Menu

Macintosh Context Menu

This is the difference between signing out and quitting:

■ When you sign-out, you end your call or exit your meeting, but VidyoDesktop continues to run.

■ When you quit, you exit the VidyoDesktop program.

If your VidyoPortal is open in your web browser, you can close the tab or window it's in or you can keep it open. If you keep it open and then take any action in the VidyoPortal, the following dialog box pops up.
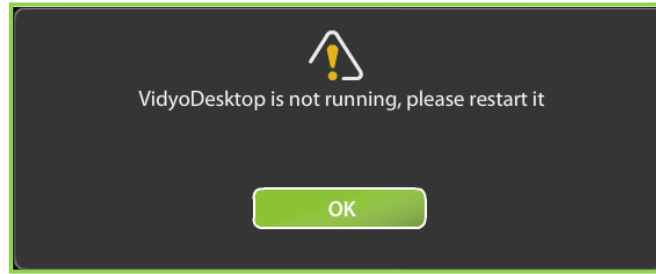
Restart your VidyoDesktop and you're ready for action. Since you quit the program, you won't see its icon in its usual place. In Windows, use the Start menu to start the program. On the Mac, use the Finder to start the program.

6. Using the Control Meeting and Settings Pages

From the VidyoPortal home page, you can click the **Control Meeting** link to access the Control Meeting page and click the **Settings** link to access the Settings page. This chapter describes the tasks you can perform from both of these pages.

CONTROLLING YOUR MEETING

The Control Meeting page enables you to control the meeting by adding, muting, and disconnecting participants, viewing the list of participants that are currently connected or not connected, and more.

- ■ If you are the owner of the room, you can access the Control Meeting page at any time during a meeting.

- ■ If you are not the owner of the room and the owner has set up a moderator PIN, you cannot access the Control Meeting page unless you know the PIN. It is the responsibility of the person who sets the moderator PIN to inform you of the PIN if they wish to do so. For more information about setting moderator PINs, refer to the *Creating Moderator PINs* section on page **61**.

- ■ If you are an Administrator, you can control the meeting from the page without having to access the Admin portal.

- ■ If you are a user but you want to your Administrator to control your meeting, simply ask the Administrator to log in to your meeting, and the Administrator can perform all the tasks on your behalf.
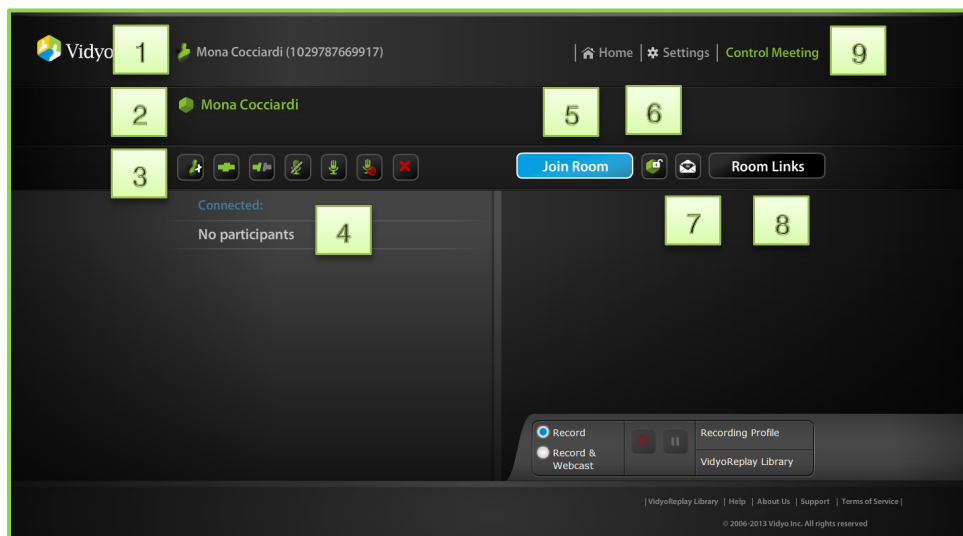
Each of the numbered items below corresponds to the numbers on the screenshot above:

1. Your online status, name, and extension

2. Status of your room and your username

3. Global meeting controls

For more information about how to use the global meeting controls, see the *Using the Global Meeting Controls* section on page **55**.

4. List of participants that are currently connected or not connected, and their statuses.

5. **Join Room** button

   If your system Administrator has given you more than one room, you will be able to select the name of the room to use from a list.

6. **Lock/Unlock Room** button

   For more information about how to lock and unlock a room, see the *Locking and Unlocking a Room* section on page **56**.

7. **Invite By Email** button

   This button enables you to invite guests to join your conferences. For example, you may want to invite a customer or a vendor. For more information about inviting guests by email, see the *Inviting Guests by Email* section on page **24**.
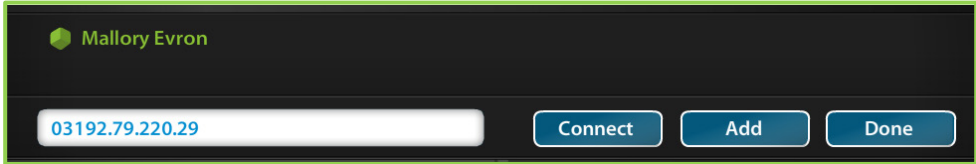
8. **Room Links** button
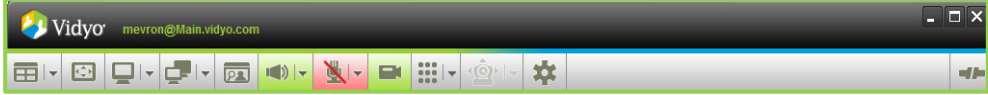
   Clicking the **Room Links** button opens a page where you can create and change room links, webcast links, room PINs, and moderator PINs. For more information, see the *Creating Room and Webcast Links* section on page **58**, the *Creating Room and Webcast PINs* section on page **60**, and the *Creating Moderator PINs* section on page **61**.

9. **Control Meeting** link

Using the Global Meeting Controls

The global meeting controls enable you to perform functions that will affect all the participants in the meeting. If you want to affect only one participant at a time, see the *Using the Participant Controls* section on page **57**.

Icon	Description
	Add Participants — Displays the Search field so you can invite additional participants to the meeting. Select and invite users as you normally would use the Search field on the VidyoPortal home page. (For more information, see the *Searching for Users or Rooms* section on page **15**.) Invited users appear in the Not Connected list until they join the meeting. To conference with a legacy system that does not exist as a user in the VidyoPortal, enter its extension number followed by its IP address, and then click the **Add** button to include it in the conference. (To obtain the IP address of the legacy system, contact your Administrator.)

	Connect All — Reconnects all participants you've disconnected from the meeting. This comes in handy if you accidentally click the **Disconnect All** button. Participants who have set Auto Answer to **On** will be automatically reconnected. Others will receive a pop-up inviting them to re-join. The button also works for participants who've voluntarily left the meeting.
	Disconnect All — Disconnects all participants from the meeting and adds them to the Not Connected list. A disconnected participant can be reconnected later.
	Mute All — Mutes the microphone input from all current participants. They'll see the microphone button on their VidyoDesktop turn red with a red line through it. **Mute All** applies to all participants as well as to legacy devices. The participants cannot unmute themselves. Only the room owner (or an Administrator) can unmute all participants. If participants click the **Microphone** button to try to unmute themselves, the button changes to this: After the room owner (or system Administrator) has unmuted all participants, their buttons will remain reddened but when they click the button, they'll be unmuted. To mute and unmute individual participants, see the *Using the Participant Controls* section page 57.
	Unmute All — Allows participants to unmute themselves.
	Silence All — Similar to the **Mute All** button, but individual users *can* unsilence themselves. The microphone button looks like this: Users can unsilence themselves by clicking the button. Legacy devices can't be silenced.
	Remove All — Disconnects all participants and removes them from both the Connected and Not Connected lists.

Note: If you have VidyoReplay™, you can also access the VidyoReplay controls from the Control Meeting page. As a moderator, you can select recording profiles as well as start and stop recording and webcasting. However, unless you are the owner of the room, you cannot access the recordings in the VidyoReplay library that belong to the owner nor can you edit the attributes of a recording. For more information about VidyoReplay, refer to the *VidyoReplay User Guide*.

Locking and Unlocking a Room

The **Lock Room** and **Unlock Room** buttons enable you to control whether or not participants can join your room.

Icon	Description
	Lock Room —This icon means your room is locked and participants cannot join the room. You can lock your room even if you don't currently have a meeting in it. If you click the button, it will change to the one shown below and the room will be unlocked.
	Unlock Room — This icon means your room is unlocked and participants can join the room. If you click the button, it will change to the one shown above and the room will be locked.

Using the Participant Controls

The Control Meeting page provides controls for the individual participants in a meeting. To view these controls, move the mouse over the area to the right of a participant's name.
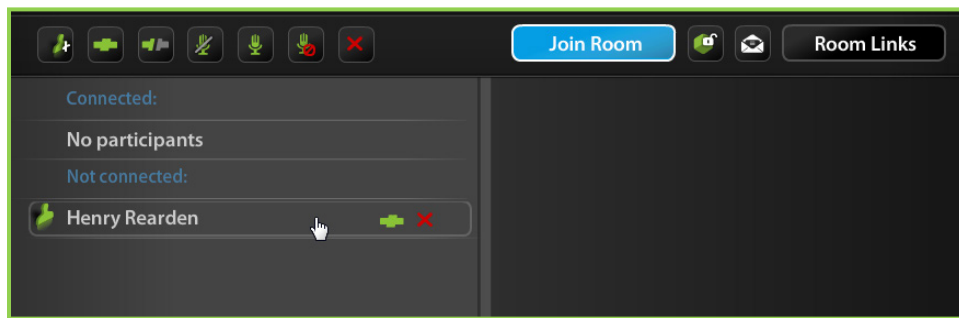
These controls are similar to the global controls, but they affect only one user at a time. They also keep you informed of the status of participants during a meeting. For example, when users mute their own sounds or choose privacy mode in their VidyoDesktop, the appropriate icon reflects the change. Likewise, when you mute a participant or choose privacy mode, they are alerted in their VidyoDesktop.

There are different controls for users that are connected and not connected.

Connected Users

Icon	Description
	Disconnect — Disconnects the participant and puts them on the Not Connected list. You can reconnect the participant later.
	Mute Participant — Mutes the volume for the participant.
	Unmute Participant — Unmutes the volume for the participant.
	Video On/Off — Turns the participant's video on or off. When privacy mode is on (using privacy), the camera icon appears with a gray slash through it; when privacy mode is off (not using privacy) the camera has no gray slash. When a participant is in privacy mode, the icon remains visible until privacy mode is turned off. This icon also changes when participants set their own privacy mode.

Not Connected Users

Icon	Description
	Reconnect — Re-invites a disconnected user to the meeting if that user's status allows it.
	Remove — Removes the participant from the Not Connected list.

Creating Room and Webcast Links

The **Room Links** button on the Control Meeting page enables you to create, change, or remove room or Webcast links. When you invite a user or a guest to a meeting or to view a Webcast, the link that you create here will be included in the invitation you send.

You can perform the tasks described in this section whether or not you're in a meeting.

To create a room or webcast link:

1. On the Control Meeting page, click **Room Links**.
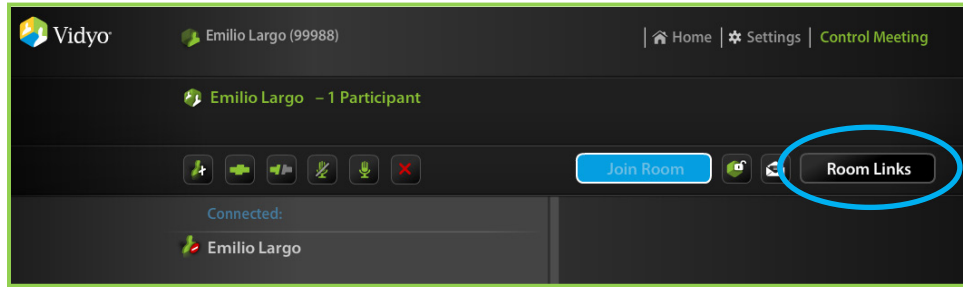
2. To create a new room or Webcast link, click **Create New**.
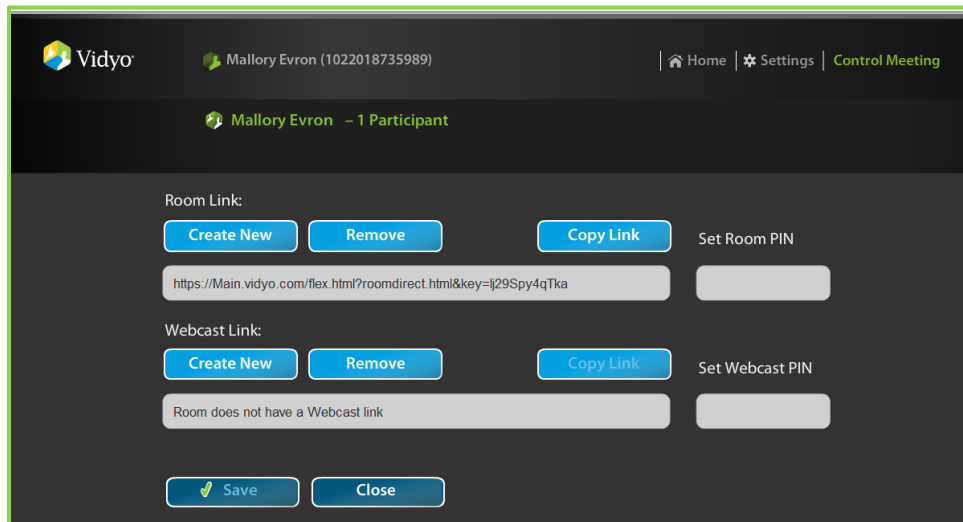
If you already have a room link, the Change Link Status dialog box will appear to let you know that you will overwrite the existing link.
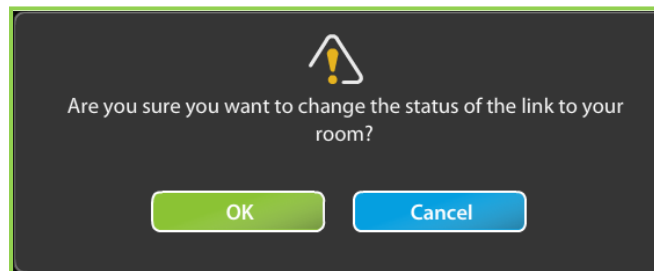
3. Click **OK** to create a new link.

4. Click **Save**.

To remove a room or Webcast link:

1. On the Control Meeting page, click **Room Links**.

2. Click **Remove**.

    The Change Link Status dialog box opens.

3. Click **OK** to remove the link to your room or Webcast.

4. Click **Save**.

Creating Room and Webcast PINs

The **Room Links** button on the Control Meeting page enables you to set room and webcast PINs. A room or webcast PIN is a three to ten character PIN that users must enter to access your room or view the webcast. It doesn't expire and it can be reset and deleted. If you invite guests to your room and you have set a room PIN, the PIN will be sent along with your room link to the guests.

If you set a room PIN, when a user tries to enter your meeting from either a guest link or from the VidyoPortal, that user will be prompted to enter the room PIN. If you set a webcast PIN, when a user tries to view the webcast, that user will be prompted to enter the webcast PIN.

To create a room or webcast PIN:

1. On the Control Meeting page, click **Room Links**.
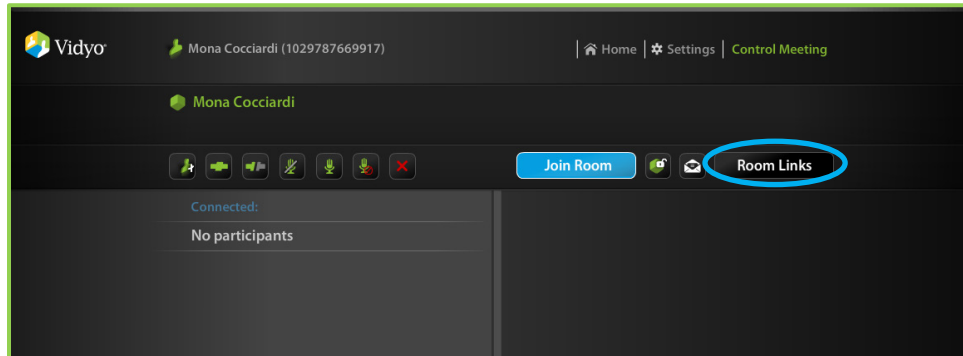
2. Do one of the following:

   ▪ To set a room PIN, type a three to ten character PIN in the Set Room PIN field.

   ▪ To set a webcast PIN, type a three to ten character PIN in the Set Webcast PIN field.
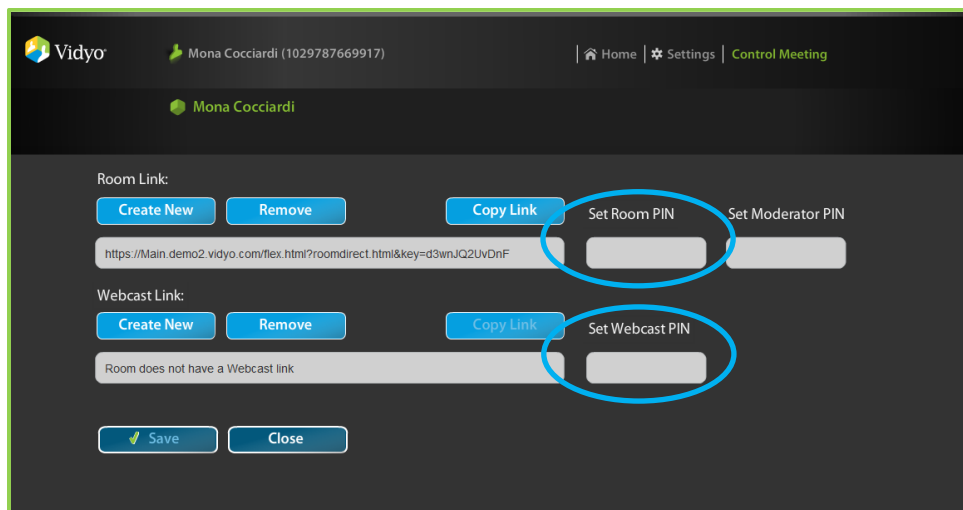
3. Click the **Save** button.
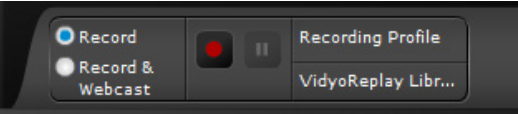
Creating Moderator PINs

A moderator PIN enables you (as the owner of a personal or public room) to share your moderator rights with other registered Vidyo users.

Like the room PIN, the moderator PIN is a three to ten character PIN, it doesn't expire, and it can be reset and deleted. If you are the owner of the room, you can create, delete, and reset the moderator PIN at any time: before a call, during a call, and even during a call that is being moderated by another person.

As the room owner, it is your responsibility to tell the PIN to those users to whom you are allowing moderator rights.

Once the PIN is set, when a user clicks on the **Control Meeting** link, that user will be prompted to enter the moderator PIN. After the PIN is validated, the user will be allowed to moderate the meeting, and can and cannot perform certain actions as explained in the following table.

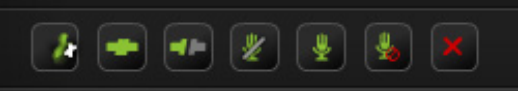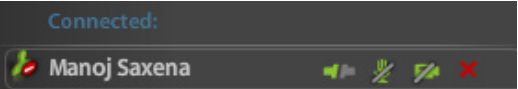| The moderator can perform these actions...	The moderator cannot perform these actions...
■ Control the meeting for all the participants (Mute All, Unmute All, Silence All, Connect All, and Disconnect All), and invite participants to the meeting. ■ Control the meeting for individual participants (Mute, Unmute, Connect, and Disconnect). ■ Lock and unlock the room. ■ Select the recording profile. ■ Start and stop recording and webcasting.	■ Access the recordings in the VidyoLibrary that belong to the owner of the room; only the owner can edit or publish the recordings. ■ Edit the attributes of a recorded file. ■ Change the room PIN or the moderator PIN for that room. ■ Send an email invitation. ■ Send a webcast link. ■ Join as an owner.

Multiple people can enter the moderator PIN and have the right to control the meeting.

If you change or delete the moderator PIN during a meeting, the new moderator PIN will take effect immediately; therefore, if a participant in a meeting tries to access the Control Meeting page during the meeting, that participant will have to enter the new moderator PIN (the old PIN will be invalid).

To create a moderator PIN:

1. On the Control Meeting page, click **Room Links**.
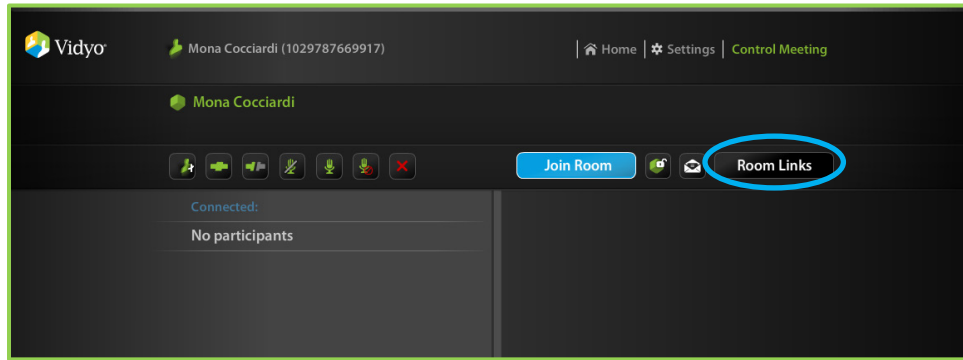
2. Type a three to ten character PIN in the Set Moderator PIN field.
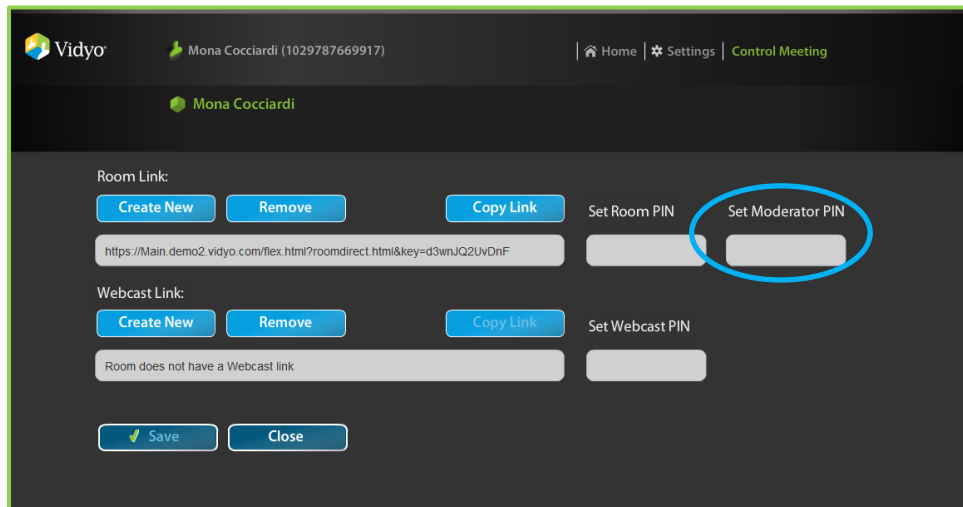
3. Click **Save**.

CHANGING YOUR SETTINGS

The Settings page enables you to change your password, change your preferred language, and view About information.

Changing Your Account Password

If you want to change your password, but you forgot your current password, you can click on the **Forgot your password?** link on the VidyoPortal login page. You will be taken to a new page where you provide the email address associated with your account. (If you provide an incorrect email address, you will receive an error

message indicating your email address is invalid.) After submitting the valid email address associated with your account, a success screen appears and a link to change your password is emailed to you at the address you provided.

Note: If the **Forgot your password**? link on your VidyoPortal login page and the Change Password link on your My Account page are disabled, it's because your system is using an authentication method called LDAP. You'll need to contact your system Administrator to reset your password.

To change your password:

   1. On the VidyoPortal Home page, click the **Settings** link.

   2. Click **Account**.
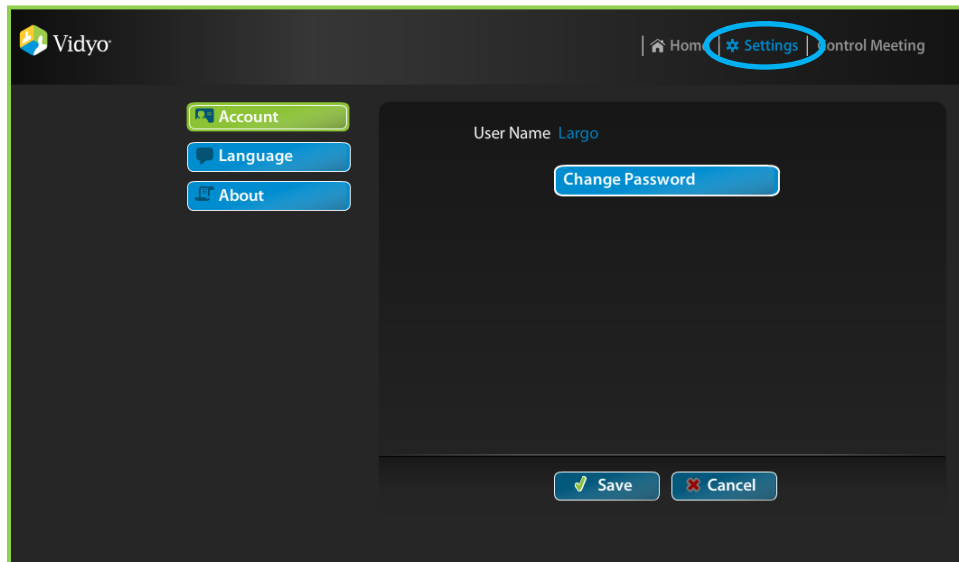
   3. Click **Change Password**.
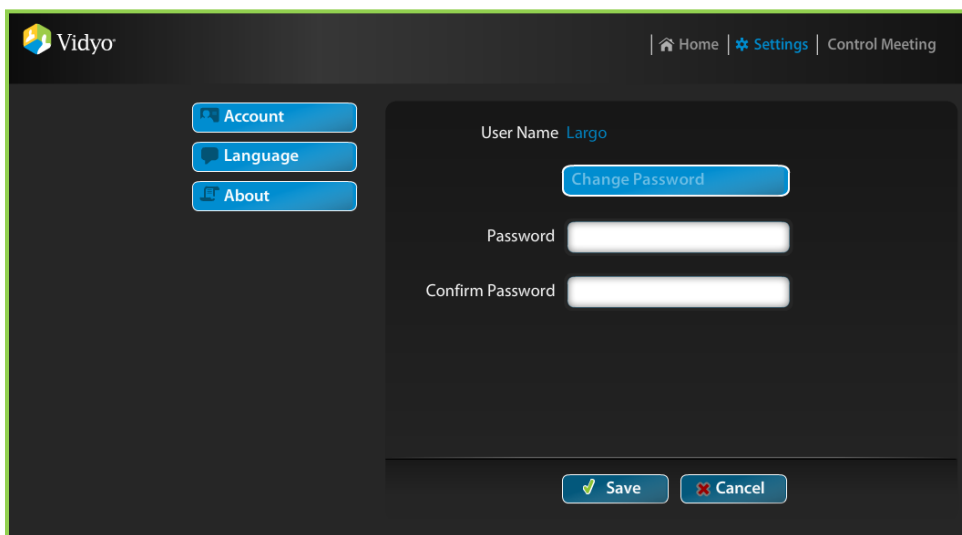
   4. Enter your new password in the Password field.

5. Enter your new password again in the Confirm Password field.

6. Click **Save**.

Changing Your Preferred Language in the VidyoPortal

A preferred language can be set by you in the VidyoDesktop and by your administrator in the VidyoPortal. The VidyoDesktop inherits the default language set in the VidyoPortal; however, it can be overridden for your current session by selecting a desired language in the VidyoDesktop. This also means the language returns to the default language set in the VidyoPortal when VidyoDesktop is restarted.

See the *Changing Your Preferred Language in the VidyoDesktop* on page for more information.

The VidyoDesktop web interface is available in these 15 languages:

- English
- Chinese (Simplified)
- Chinese (Traditional)
- Finnish
- French
- German
- Italian
- Japanese
- Korean
- Polish
- Portuguese
- Russian
- Spanish
- Thai
- Turkish (Windows and Mac only)

To change your preferred language in the VidyoPortal:

1. On the VidyoPortal Home page, click the **Settings** link.

2. Click **Languages**.
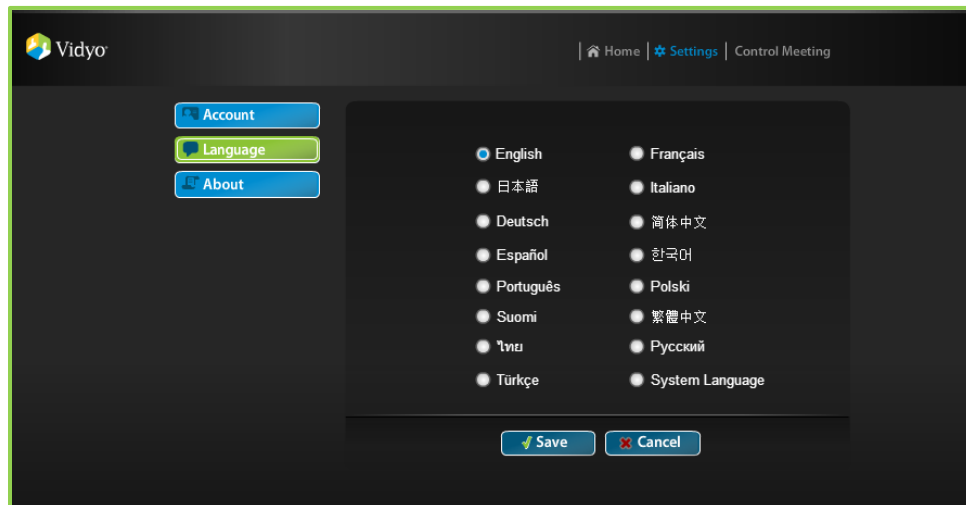
3. Select your preferred language.

4. Click Save.

Viewing About Information

The About tab tells you the version number of your VidyoDesktop and VidyoPortal. You may be asked to provide this information by technical support personnel.

To view About information:

1. On the VidyoPortal Home page, click the **Settings** link.

2. Click **About**.
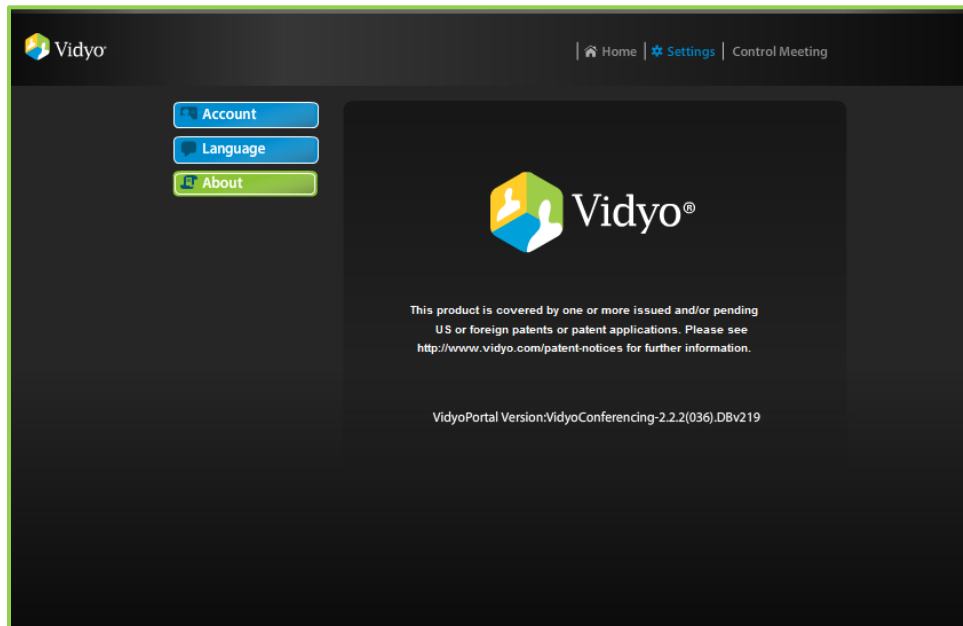
Appendix A Definitions

As a Vidyo user, it's helpful to have a basic understanding of the terms we use.

DESTINATIONS

Destinations are places where you can interact with the VidyoConferencing System. The following destinations are described in detail in this document. You can also refer to Chapter 1 for more overview information about the VidyoPortal, VidyoDesktop, and other Vidyo components.

- **VidyoPortal** – The server that provides audio and video communications services. This is also the term used for the pages you use to set up your software and do other tasks. Your VidyoPortal may appear in a web browser window or tab or simply as a free-floating window on your screen.

- **VidyoDesktop** – The Vidyo software program running on your local computer, enabling you to participate in direct point-to-point (one-on-one) video calls and to participate in video conferences. You see and hear others using your VidyoDesktop and they see and hear you. There are VidyoDesktop versions for Windows, Macintosh, and Linux.

- **Endpoint** – A generic term for any device that can connect to the system. Endpoints include desktops and laptops running VidyoDesktop, phones and tablets running VidyoMobile, VidyoRooms, VidyoPanorama, and legacy devices.

USERS

Anyone who uses the system is a user. There are seven types of users:

These are the technical experts who run the system.

- **Super Admin** — A Super Admin has administrative privileges and is responsible for general portal configuration including network settings, components configuration, maintenance (backup and upgrades), tenant configuration and global settings. In a multi-tenant system, the Super Admin has full administrative privileges above the Tenant Admin and all regular Tenant Admin rights.

- **Admin/Tenant Admin** — An Admin or Tenant Admin has administrative privileges. The Admin or Tenant Admin can add, delete, manage users, set up public rooms and set up groups (which define the maximum number of participants and bandwidth for users).

- **Operator** — an Operator can manage meeting rooms and normal users.

This is you.	■ **Normal** — Most users are Normal users. As a Normal user, you can join VidyoConferences hosted by others, host and control your own VidyoConferences and place point-to-point video calls and voice-only calls. You can change own password, set your own PIN code that invitees have to enter to join your VidyoConference and more. You also have your own VidyoPortal (set of Web pages), which include a "room" where you can host VidyoConferences. *This guide is all about Normal users.*
These are for VIPs.	■ **Executive Desktops** — Let's say your system has 100 VidyoLines and five Executive Desktop user licenses. Even if all 100 VidyoLines are in use, your five Executive Desktop users can still use the system. An Executive Desktop user is never denied service due to lack of VidyoLine availability. Executive Desktop licenses are ideal for critical applications like executive use, emergency medicine, military command and control, real-time financial markets and so on.
This is a "user" that's actually a system used in conference rooms.	■ **VidyoRoom** — This is not a physical room. It's a teleconferencing appliance that's usually placed in an actual conference room. It has the same rights as a normal user. In fact, a VidyoRoom is one of only two components that are also users. VidyoRooms are commonly called simply "room systems" for short. VidyoRoom has its own User Guide.
This is another "user" that's actually a system used in conference rooms.	■ **VidyoPanorama** — VidyoPanorama is a telepresence solution that offers up to 20 screens of 1080p at 60 fps resolution at just 10% of the cost of traditional solutions. Each individual screen can show one participant, multiple participants or an application window that a user is sharing. VidyoPanorama has its own User Guide.
These are products Vidyo doesn't make but can work with anyway.	■ **Legacy** — Devices such as ordinary cell[1] or landline telephones or conferencing systems that use old-style H.323 and SIP-based videoconferencing methods. A legacy device has no personal room. (Working with legacy devices requires an optional VidyoGateway component be installed in your system.)
This is for people who are not registered with the system.	■ **Guests** — You can invite a guest to a meeting my sending them an email invitation as seen on page 55. The guest user clicks on the link provided in the email, downloads the software if they haven't before, and then enters his or her name to join the meeting. Guests have only the ability to join a conference to which they've been invited. They do not have the ability to log in to the system or receive incoming calls. Refer to the separate *Quick Guest Guide* for more details.

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[1] If a cell phone or tablet has VidyoMobile installed, it's not considered a legacy device.

CALLS

Voice-Only Calls

If your organization has purchased a VidyoGateway server, both registered and guest users can participate in a VidyoConference in voice-only mode by phone. Your My Room settings page provides a phone number to join your room, as do the Control Meeting page and the home page when you select My Room. Also, when you invite a participant by email, the phone number and extension appear in the invitation message.

When a participant joins a conference by phone, that participant's phone number appears in the list of participants in the VidyoPortal home page and in the VidyoDesktop, even when the participant doesn't broadcast their phone number.

Direct (Point-to-Point) Calls

You can call a specific user in a direct call. A direct call involves just two users; no additional users can join. When you call a meeting room and there are just two of you in the room, it is similar to being in a direct call. The difference with calling a meeting room is that others can potentially join you in the meeting. This isn't so in a direct call.

Note: When you are in a call, you cannot attend a meeting or place another call until you end your current call.

MEETING ROOMS

A meeting is an audio and video connection between two or more users interacting and sharing their video streams and, optionally, sharing application windows in a meeting room.

Meeting rooms are virtual rooms where users of the Vidyo system can gather for VidyoConferences. There are two types of meeting rooms:

- **Personal** – You have your own personal room. This is the equivalent of a personal office or cubicle in the physical world.

- **Public** – Operators and Administrators can create common public spaces. Think of these as the equivalent of conference rooms in the physical world. If need be, they can also create public rooms for individual users.

Meeting rooms of either type include the following configuration options:

- **Locked / Unlocked** – If you lock a meeting, nobody else can join it.

- **PIN Protected** – A PIN-protected room requires everyone who wishes to join the room to enter the specified PIN code in order to be admitted. You can decide whether or not to require a PIN for any meeting and if so, what the PIN will be. If a PIN is required it's automatically included in the invitations you email to prospective participants.

GROUPS

- Users, Public Meeting Rooms, and VidyoRooms belong to provisioning Groups.

- When your Admin creates your account, your personal room is automatically generated. You're also assigned to a Group.

- The maximum number of users you can have in one VidyoConference and the maximum amount of bandwidth you're allowed to use at one time is determined by the Group you've been assigned to by your Administrator.

- Your Admin may re-assign you to another group, which could mean you might find you can invite more or fewer participants to a VidyoConference you host and have greater or lesser total bandwidth at your disposal.

- Even if your Admin decides not to use groups, a "default" Group is set up within the system. It can be modified but it can't be removed.

The default group has the following factory configuration:

- Maximum Number of Participants in a Given VidyoConference: 10

- Maximum Receive Bandwidth Per User (Kbps): 10,000

- Maximum Transmit Bandwidth Per User (Kbps): 10,000

Note: The bandwidth limitation applies to the user, so two users can have different limitations while participating in the same conference. The maximum number of participants is limited according to the room the meeting is held in —so this applies to all users in a meeting.

MULTI-TENANTS

A single VidyoPortal can serve multiple unrelated organizations (like an office building that houses the offices of many unrelated companies), or one organization might divide its departments or geographical locations into sections. Both types of sections are called "tenants." The following terms apply only if you are a multi-tenant user:

- Tenant — Your organization or a selection of your organization's members (HR, R&D, US Offices, UK Offices etc.)

- Tenant Name — Simple identifier within the system and among other tenants.

- Tenant URL — The tenant's URL is the URL/FQDN (full qualified domain name) that tenants use to access their virtual VidyoPortals.

If your organization is not using the multi-tenant capability, there's still at least one tenant, called the default tenant.