BroadData Unified Meeting

User Guide For Pay Per Minute Use Customers

v4.4.4

Unified Meeting lets you quickly and easily bring people together—from anywhere in the world—so they can see what you want to show them, hear what you have to say and interact in order to learn, collaborate and make decisions. You get audio, web and video conferencing in a single, proprietary system that integrates with everyday business tools, like calendaring systems and instant messaging clients, so starting and joining meetings is done just with a click of the mouse. The best part is that all of this comes as a service that we manage for you.

Reliable and secure, Unified Meetings allows you to present PowerPoint® slides, share applications, quiz and survey participants and show web sites—all with the same impact and results as in-person meetings. So you meet more productively and more often without the time and expense of travel.

Use Unified Meeting for:

- Sales presentations
- Training and e-learning programs
- Marketing seminars
- Product launches
- Departmental meetings
- Company announcements
- Collaboration and project management

Tips for a Successful Conference

Below are some helpful hints for conducting an efficient and productive Unified Meeting.

- Prepare in advance. To avoid meeting delays, take time before the conference to create and upload any resources you'll need for your meeting, such as presentations, surveys or quizzes.
- Enter the meeting early to ensure participants can access your meeting at the scheduled start time. Give yourself a few minutes to open the meeting room and make sure all necessary system components are loaded.
- When speaking, talk directly into either a headset or telephone receiver for optimal clarity.
- Mute all participants in non-collaborative meetings to minimize background noise.
- Be conscious of participant connection speeds, as they may vary. Allow time for transition between slides.
- For optimal application sharing performance, keep the number of open windows to a minimum.
- Use annotation tools and include polling and quizzes to promote interactivity.
- To help participants better understand and recall content, limit presentation materials to six or seven lines per slide. Use larger-sized fonts for legibility.
- Be sure participants download the Unified Meeting application prior to your meeting if they wish to use certain features such as presenter capabilities and desktop video.

Note: Your Participants only need to download and install the Unified Meeting application prior to a web conference if they need to use certain features such as co-presenter capabilities and desktop video. Otherwise, Participants are not required to download and install the Unified Meeting application to join a Unified Meeting web conference.

Download & Install Unified Meeting Client

You (and any of your Co-Moderators or Presenters, if applicable) must download and install the Unified Meeting application in order to use collaborative features such as presentation slide show, application sharing, surveys, etc.

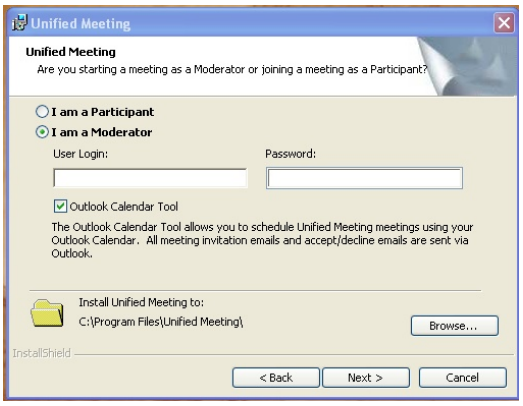
If you do not download and install the Unified Meeting application, you can still launch browser-only Unified Meetings to manage your audio participants online. You can utilize features such as mute, dial me, chat and open/close meeting room door. You will not be able to use collaborative features such as presentation slide show, application sharing, surveys, etc.

CALL TECH SUPPORT 24 x 7 at 877-769-7229 if you have any questions or problems with installation. Just follow the simple instructions below and you are on the way to your first Unified Meeting experience.

Note: Your Participants only need to download and install the Unified Meeting application prior to a web conference if they need to use certain features such as co-presenter capabilities and desktop video. Otherwise, Participants are not required to download and install the Unified Meeting application to join a Unified Meeting web conference.

Note: Before proceeding with the following steps, please ensure that you have administrator rights to perform the download and installation.

1. Go to http://broaddata.conferencing.com/um/
2. Click **Download & Install**
3. Once the download prompt appears, click **Run**
4. Select **I accept the terms in the license agreement** and click **Next**.
5. Enter your Unified Meeting **User Login** and **Password** in the fields shown (from your Welcome Email). Check the box if you want to use the Outlook Calendar tool and click **Next**.



6. Upon completing of download, check **Sign in to Unified Meeting** and click **Finish**.

7 Soon, you will see a Unified Meeting desktop icon in your system tray Right click and select the appropriate item to Enter Conference Manager or Start a Unified Meeting, etc. You have successfully installed Unified Meeting !

*Note: If you do not install the Outlook or Lotus Notes Calendar tools, click the Unified Meeting icon in your system tray and select **Schedule a Meeting**. Follow the steps through the scheduling wizard.*

BROWSER MODERATOR

If you do not install the meeting application, you can launch browser-only meetings to manage your audio participants online.

You can utilize features such as mute, dial me, chat and open/close meeting room door. You will not be able to use collaborative features such as presentation slide show, application sharing, surveys, etc.

Supported browsers and operating systems for Browser Moderator include: IE 6.0+ (Windows), Firefox 1.5+ (Windows/Mac/Linux), Safari 2.0+ (Mac).

Unified Meeting – Start Scheduled or On-The-Fly Meetings & Participant Invitation Options

With Unified Meeting you have several different, easy-to-use Participant invitation options:

- **Microsoft Outlook** – When you install the Unified Meeting client you have the option of including an Outlook Calendar Tool. Use the integrated Unified Meeting Outlook button to schedule Unified Meetings and invite your Participants.
- **Unified Meeting Client** – If you want to schedule your Unified Meetings using the Unified Meeting desktop client, the scheduling wizard will create and send Participant invitations for you.
- **Unified Meeting Web Site** – For on-the-fly Unified Meetings or if you don't want to use Outlook or the Unified Meeting Client to schedule meetings, simply direct your Participants to go to http://broaddata.conferencing.com/um/ and click on the Join A Meeting button.
- **Unified Meeting Quick Invite** - You can quickly invite Participants to your Unified Meetings using the Quick Invite feature during a Unified Meeting. After you have initiated a Unified Meeting, click on Quick Invite and follow the prompts to have the Unified Meeting service send an immediate email invitation to Participants.
- **Instant Messenger** – You can quickly invite Participants to your Unified Meetings using an instant messenger. Unified Meeting is fully integrated with a variety of instant messenger programs. After you have initiated a Unified Meeting, click the Meeting drop-down and select Meeting Options then click Instant Messenger and the corresponding check boxes to invite Participants with the instant messenger of your choice.

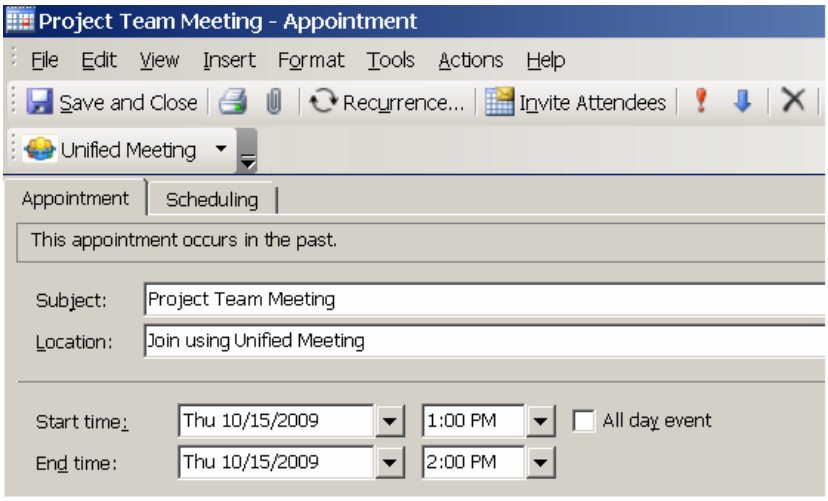
See the following pages for detailed descriptions of each option.

Microsoft Outlook

WHEN YOU INSTALL THE UNIFIED MEETING CLIENT YOU HAVE THE OPTION OF INCLUDING AN OUTLOOK CALENDAR TOOL. USE THE INTEGRATED UNIFIED MEETING OUTLOOK BUTTON TO SCHEDULE UNIFIED MEETINGS AND INVITE YOUR PARTICIPANTS WITH MICROSOFT OUTLOOK

1. Open an appointment time in your Outlook Calendar, then click **Unified Meeting**. The meeting access information will appear in the body of the appointment.

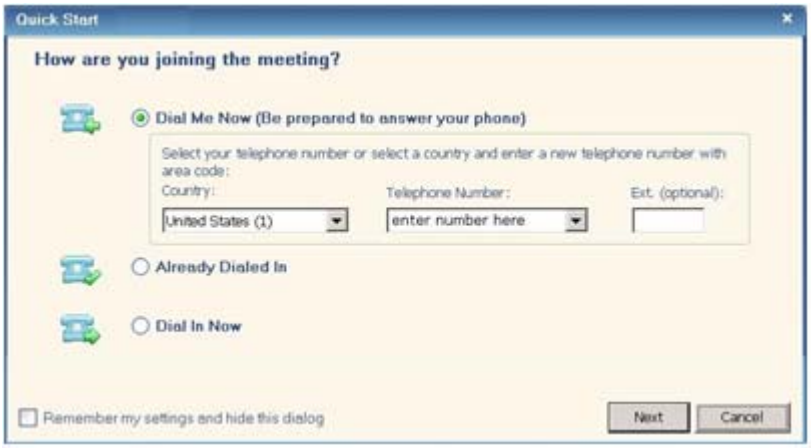
2. Your Outlook meeting invitation will be automatically populated with meeting access links for you and your participants.



3. To join the meeting, the Moderator and Participants click their respective links in the meeting invite.

4. Unified Meeting will prompt Moderators and Participants to enter their telephone numbers to be automatically dialed or choose to dial into the meeting.

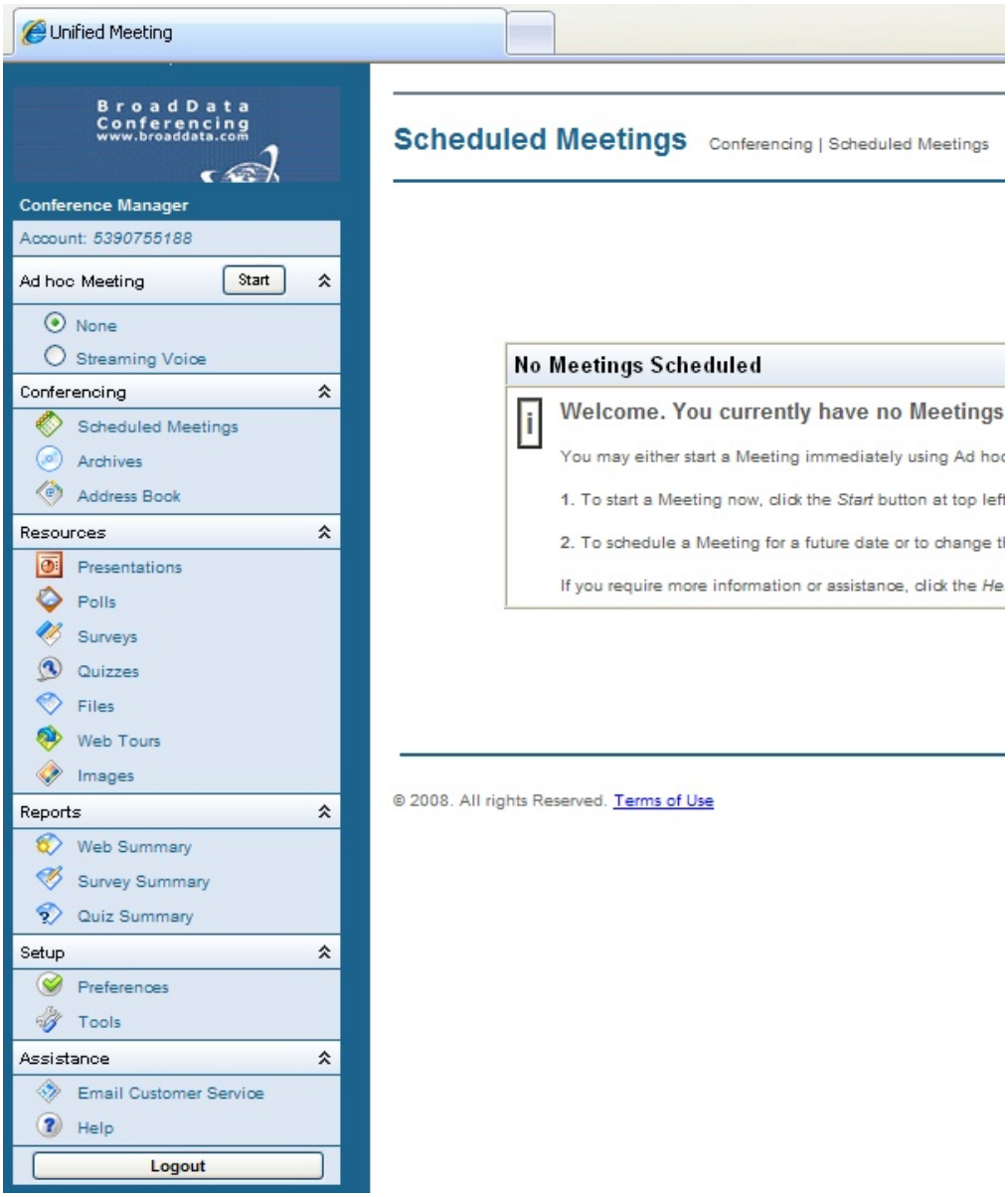
5. Unified Meeting then dials out to both moderators and participants to begin the meeting if the Dial Me Now option is selected.



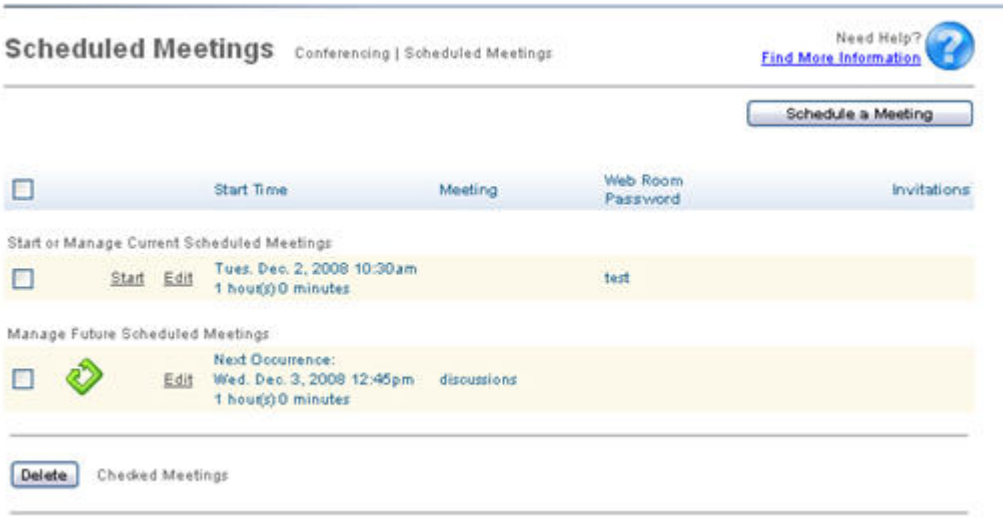
Unified Meeting Client

The Unified Meeting desktop icon is automatically populated in your System Tray when you install the Unified Meeting application.

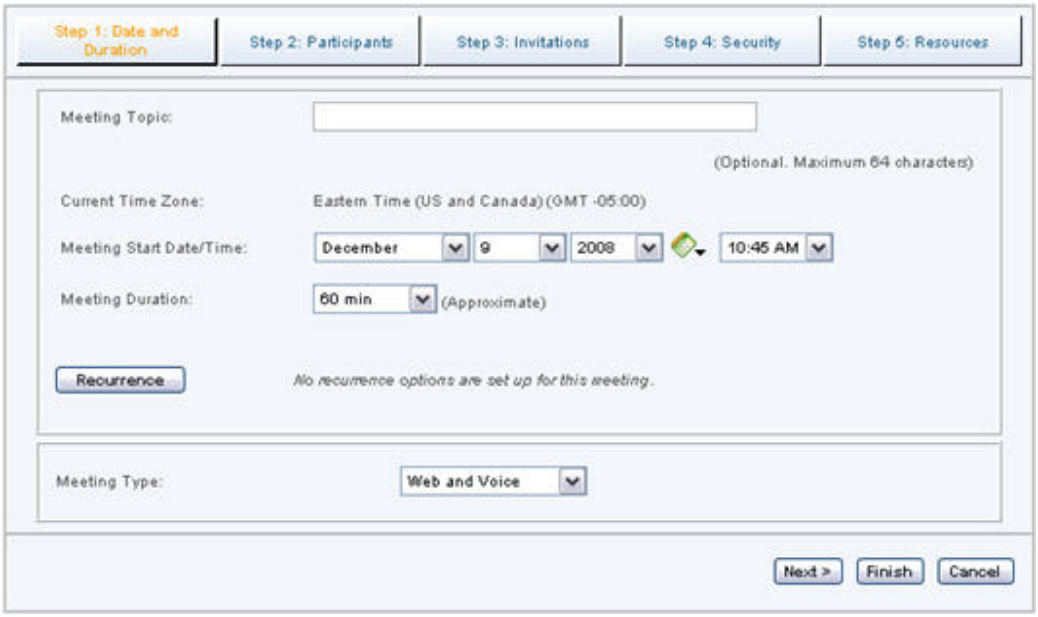
1. To schedule a Unified Meeting and invite participants, right click the Unified Meeting desktop icon located in your system tray and select **Enter Conference Manager**. A browser window will open with your Unified Meeting interface.



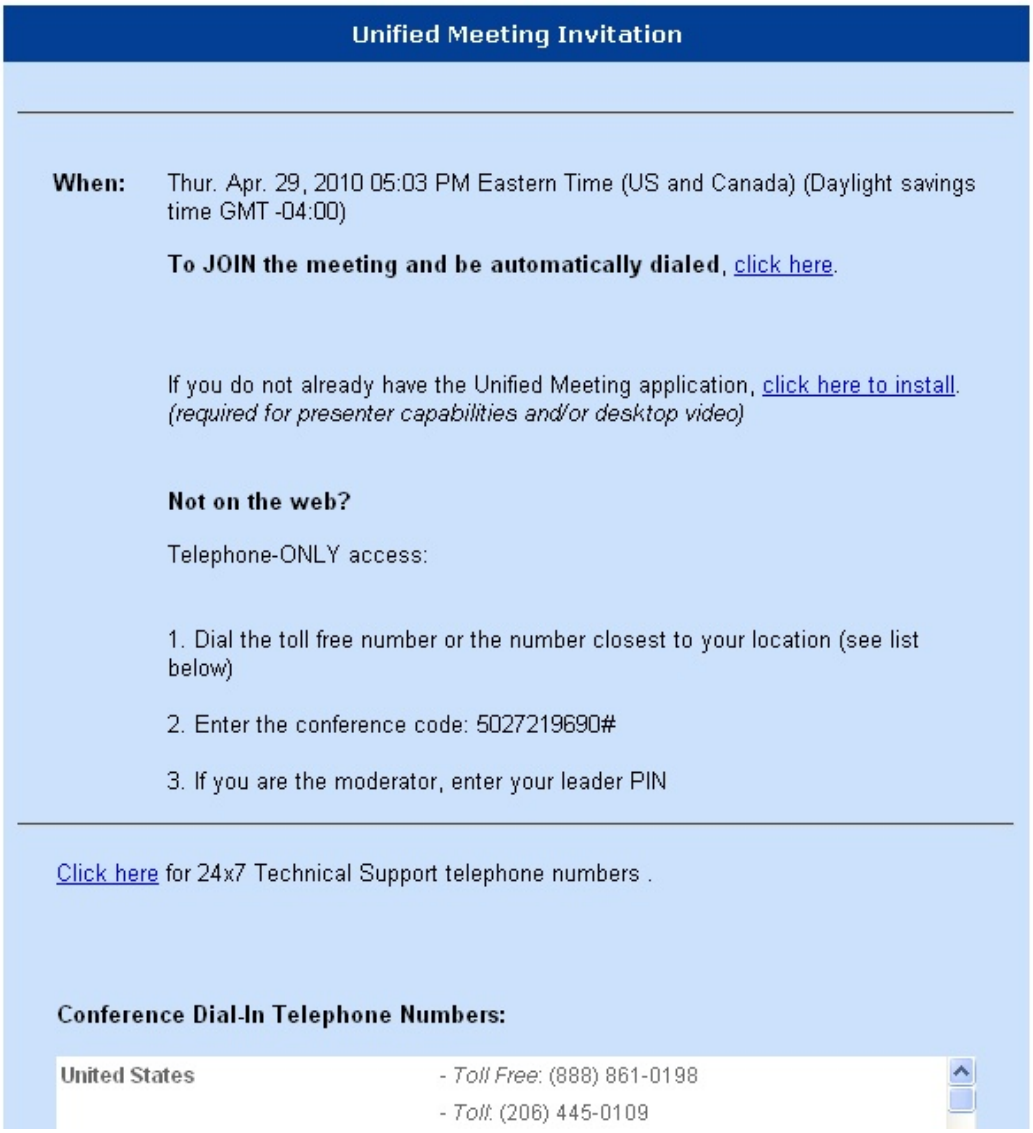
2 To see a list of your scheduled meetings, expand the **Conferencing** section of the left panel, and then click **Scheduled Meetings**.



3 Click **Schedule A Meeting** to start the Schedule A Meeting wizard. Complete the 5-step wizard to schedule your Unified Meeting and send participant invitations.



4 Participants will receive an email invitation with a join link and dial-in information.



Unified Meeting Invitation

When: Thur. Apr. 29, 2010 05:03 PM Eastern Time (US and Canada) (Daylight savings time GMT -04:00)

To JOIN the meeting and be automatically dialed, click here.

If you do not already have the Unified Meeting application, click here to install.
(required for presenter capabilities and/or desktop video)

Not on the web?

Telephone-ONLY access:

1. Dial the toll free number or the number closest to your location (see list below)

2. Enter the conference code: 5027219690#

3. If you are the moderator, enter your leader PIN

Click here for 24x7 Technical Support telephone numbers .

Conference Dial-In Telephone Numbers:

United States	- *Toll Free*: (888) 861-0198
	- *Toll*: (206) 445-0109

Unified Meeting Web Site

Use the Unified Meeting web site for on-the-fly Unified Meetings if you don't want to use Outlook or the Unified Meeting Client to schedule meetings.

Simply direct your Participants to go to:

http://broaddata.conferencing.com/um/

and click on the **Join A Meeting** button

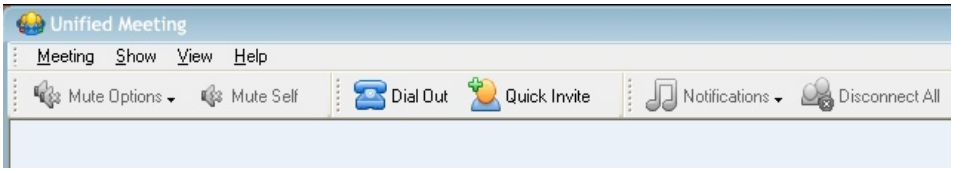
As the Moderator, you can start the Unified Meeting meeting by clicking **Host A Meeting** or by right clicking on the the Unified Meeting desktop icon populated in your system tray and selecting **Start Meeting**.

Unified Meeting Quick Invite

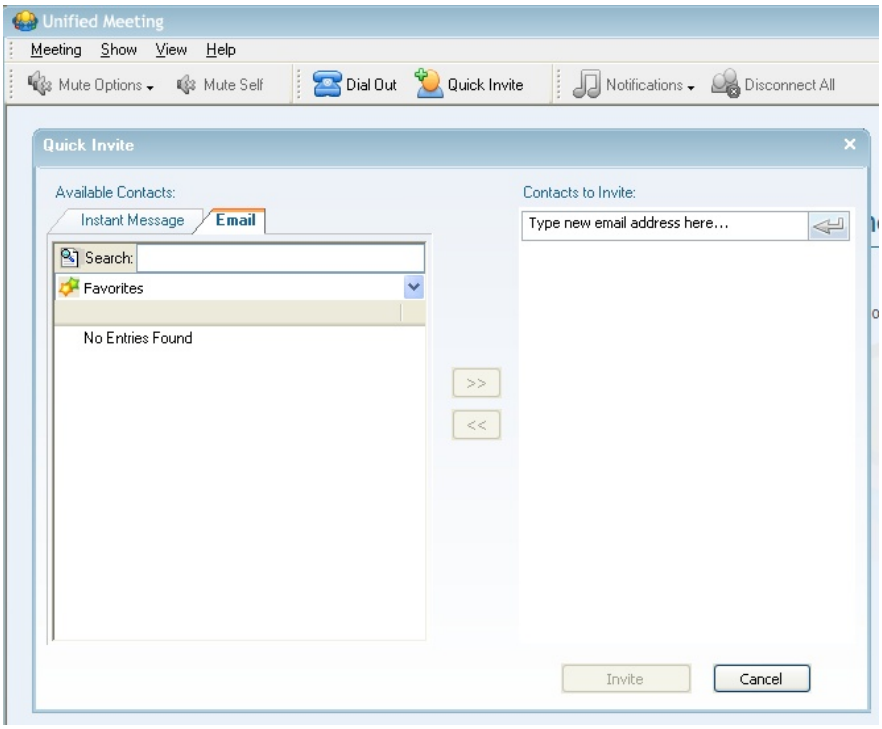
You can quickly invite Participants to your Unified Meetings using the Quick Invite feature during a Unified Meeting.

1. Once you have installed Unified Meeting, click the desktop icon in your system tray and select **Start Meeting**.

2. Click the **Quick Invite** button



3. Select email addresses from your available contacts list on the left or type in new email addresses on the right and then click **Invite**



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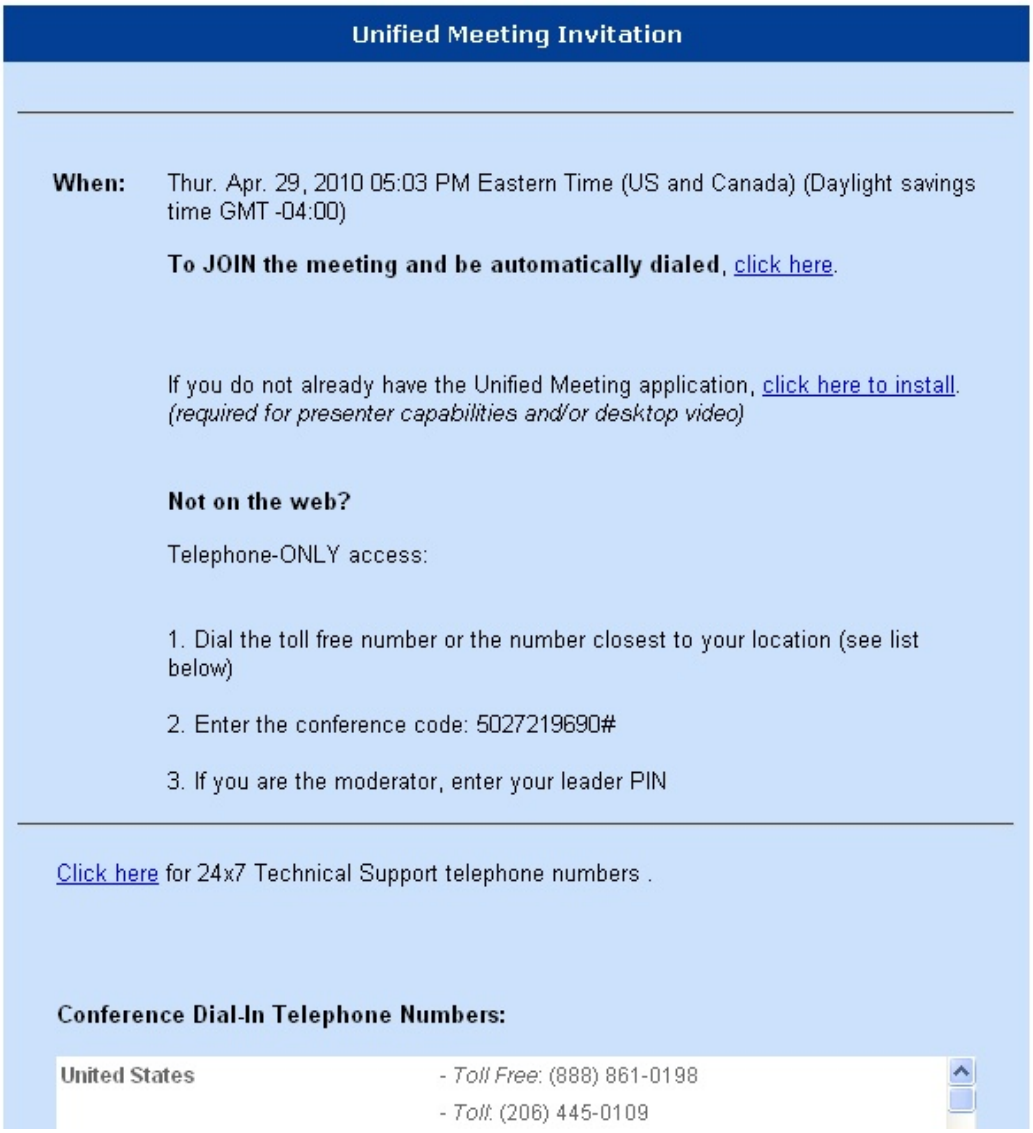

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Conference Dial-In Telephone Numbers:

United States	- *Toll Free*: (888) 861-0198
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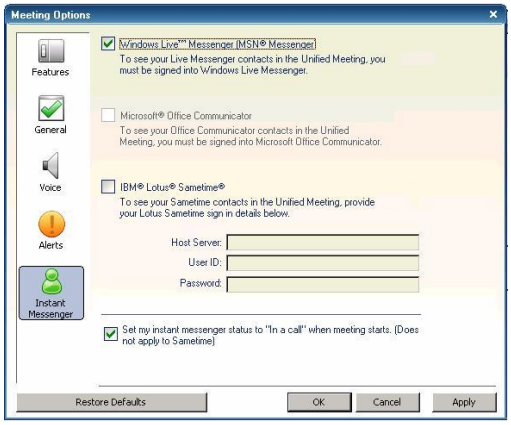
Instant Messenger

You can quickly invite Participants to your Unified Meetings using an instant messenger. Unified Meeting is fully integrated with a variety of instant messenger programs.

1. Once you have installed Unified Meeting, click the desktop icon in your system tray and select **Start Meeting**.

2. Click the Meeting drop-down menu and select **Meeting Options**.

3. Click **Instant Messenger**, then the corresponding check boxes to integrate with Windows Live Messenger and/or Microsoft® Office Communicator.



4. To integrate with Lotus Sametime, check the corresponding box and enter your host name, communication port, user ID and password. Click **OK** to save the setting.

Note: Your instant messenger program must be running while performing the instructions above and to send invites to your Unified Meeting participants.

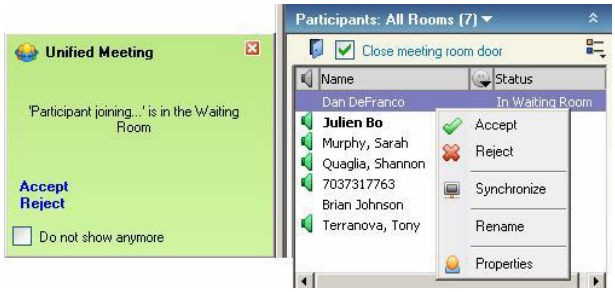
MANAGING & RUNNING YOUR UNIFIED MEETING

Conference Security

Add further security to your meeting by closing the meeting room door.

Once the meeting room door is closed, the moderator can screen participants in the waiting room, and then provide them access to the meeting one at a time.

You will be notified of an incoming participant by the desktop icon prompt.



You can accept or reject an incoming participant by either:

- Clicking the corresponding link in the desktop icon prompt.
- Right-clicking the incoming participant's number/name.

Note: By default the door to the meeting is closed.

Voice Management

VOICE STATUS ICONS

The moderator can always see the voice status of the participants in the Participant panel.

	Standard voice icon The participant (or moderator) is currently in the main voice meeting room.
	Active speaker icon The participant (or moderator) is currently speaking, or it may indicate background noise coming from this line.
	Muted line icon Participants cannot be heard when their lines are muted. In Group Mute mode, participants have the ability to unmute themselves.
	Lecture Mute icon Participants cannot be heard when their lines are muted and do not have the ability to unmute themselves.

MUTE/UNMUTE PARTICIPANTS

Click the voice icon next to the participant's name to mute or unmute that participant. To mute/unmute all participants at once, click **Mute Options/Unmute All**.

GROUP MUTE ALL, LECTURE MUTE ALL & Q & A MUTE ALL

Enable **Group Mute All, Lecture Mute All** or **Q & A Mute All** by clicking the Mute Options button at the top of the meeting interface.

Group Mute All: All participants are muted and have the ability to unmute themselves by pressing #6 on their telephone keypads.

Lecture Mute All: All participants are muted and cannot unmute themselves.

Q & A Mute All: All participants are muted. A participant can put themselves in queue to ask a Question by dialing #66 from their phone. (See the Manage Your Own Audio Q & A Online Guide for complete instructions)

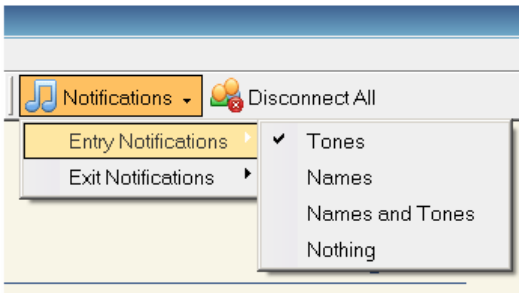
DIAL OUT TO PARTICIPANTS

Click **Dial Out** and the Dial Participant window will appear. Enter the name and telephone number of the participant to call and click **Dial**. (Be sure there are no spaces or invalid characters between the numbers).

You can also choose from your Address Book Contacts by clicking **Address Book**.

CONTROL ENTRY & EXIT NOTIFICATIONS

Click the Notifications button at the top of the meeting interface to control participant entry and exit notifications for your current meeting. Choose *Tones, Names, Names & Tones* or *Nothing*.

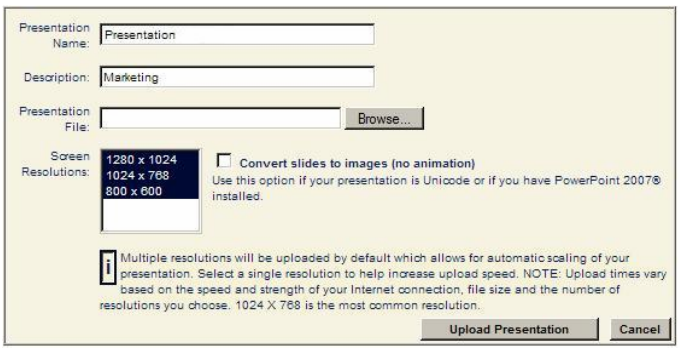


Showing a PowerPoint Presentation

Moderators can easily show a PowerPoint presentation to participants using the web.

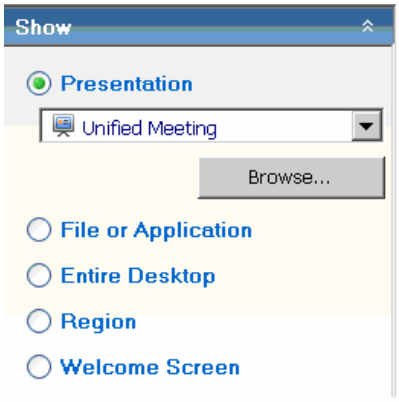
BEFORE THE MEETING

1. Click your desktop icon and select **Enter Conference Manager**.
2. At the Conference Manager page, click **Resources** and select **Presentations**.
3. At the Presentation Upload page, click **Upload Presentation**.
1. Browse and select the file you want to upload, and then enter the presentation name.
4. Check **Convert slides to images (no animations)** if you are using PowerPoint 2007.



DURING YOUR MEETING

1. In the Show panel, select **Presentation** and choose your presentation from the drop-down menu. It will load automatically.
2. Click the slide preview thumbnails or use the forward and back buttons to navigate through your presentation.
3. Click the slide being displayed to proceed to the next slide.

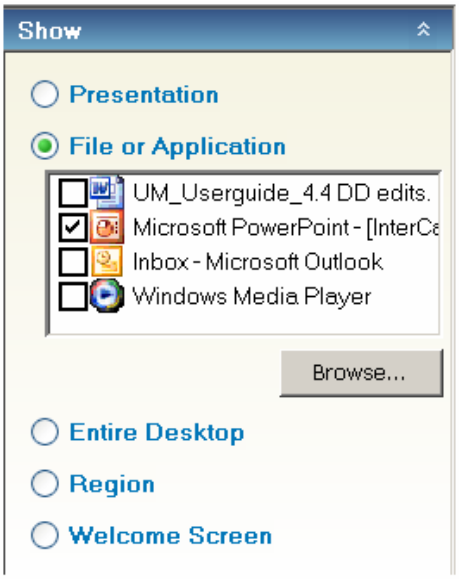


*Note: You can also upload a presentation file here during your meeting. Simply click **Browse** and select the file you wish to upload.*

Share an Application or Entire Desktop

Share and collaborate on files and applications with your participants directly from your desktop.

1. In the Show panel, select **File or Application** and choose the application(s) you would like to show to participants.
2. All applications currently open will be listed. If the application you want to share is not listed, click **Browse** and select the file.
3. Check the application(s) to begin sharing.
4. Alternatively, click **Entire Desktop** to share all applications open on your computer. Everything on your screen will be visible to your participants.

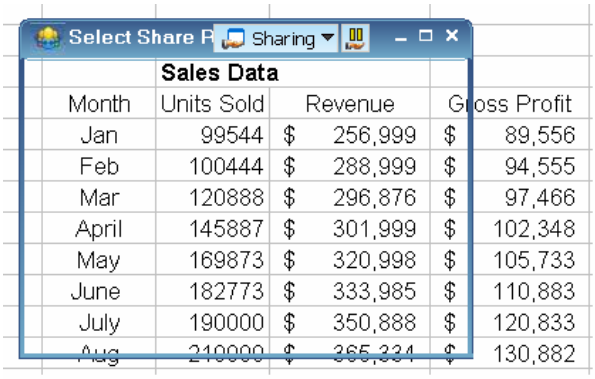


Note: You can click the shared application to hide the control panel. Simply scroll over the Unified Meeting tab on the right-hand side of your screen for the control panel to reappear on top of the application.

Region Sharing

Share a specific region of a file or application from your desktop.

1. In the Show panel, select **Region.** A small window will appear.
2. Scroll over the specific section of the file or application you would like to share to the audience.
3. Select **Start Sharing** from the drop down menu to begin sharing.
4. To exit Region Share, click the X on the top right corner of the window. The Welcome Screen will now be displayed.



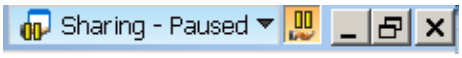
	Sales Data		
Month	Units Sold	Revenue	Gross Profit
Jan	99544	$ 256,999	$ 89,556
Feb	100444	$ 288,999	$ 94,555
Mar	120888	$ 296,876	$ 97,466
April	145887	$ 301,999	$ 102,348
May	169873	$ 320,998	$ 105,733
June	182773	$ 333,985	$ 110,883
July	190000	$ 350,888	$ 120,833
Aug	210000	$ 365,334	$ 130,882

PAUSE APPLICATION SHARING

Moderators and Presenters can pause an application being shared to the audience. Once paused, anything the moderator/presenter does on his desktop will not be seen by participants until sharing is continued.

To pause a shared application: Click on the pause icon next to the **Sharing** button at the top right corner of the screen. The icon will flash and the Sharing button text will change to **Sharing – Paused**.

To continue sharing: Click on the pause icon again. The **Sharing** button text will change back to **Sharing**, indicating that the application is no longer paused.



GRANTING CONTROL TO PARTICIPANTS

Participants can be granted control to manipulate an application the moderator is sharing from their computer. This does not promote them to a presenter role, but allows them to edit the moderator's shared application.

To grant control to a participant:

1. Right-click the name of the participant you wish to grant control.
2. Select **Grant Control of Desktop / Application**.
3. The participant will receive a notification to take control by clicking her mouse.

To revoke control from a participant at any time, simply click your mouse.

PROMOTING PARTICIPANTS TO PRESENTER

Participants can be promoted to a Presenter during a meeting so they can share content from their own computers and push slides in Presentation mode. *

To promote a participant to Presenter:

1. Right-click the name of the participant you wish to promote.
2. Select **Promote to Presenter**.
3. The participant will receive a notification that he has been promoted to the role of Presenter.

To revoke control and demote a Presenter to participant, simply right click the participant's name and select **Demote to Participant**.

Note: Participants must install the Unified Meeting application in order to be promoted to Presenter.

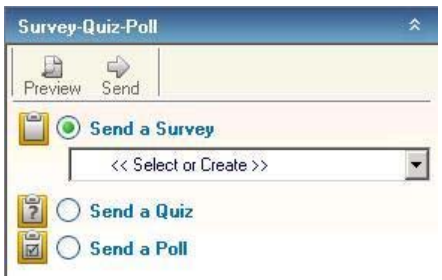
Enhanced Features

Utilize a variety of powerful features to make your meeting more interactive and enrich the experience.

SURVEYS/QUIZZES/POLLS

Gather feedback, test your participants' knowledge and get quick results with surveys/quizzes and polls.

1. Click the Meeting drop-down at the top of the meeting interface and select **Meeting Options**.
2. Check **Display Survey-Quiz-Poll** and click **OK**.
3. Select the survey, quiz or poll from the control panel and click **Send**.



You can also create a survey, quiz or poll on the fly by choosing **Create** in the drop down menu. Once created, click **Refresh** before sending your survey

REPORTS

Unified Meeting stores detailed reports from your meetings, with information on the duration of the meeting, number of participants, participant names and survey or quiz results.

1. Click the **Reports** tab in the Conference Manager to access meeting reports.
2. Select **Web, Survey or Quiz Summary** to view report details.

DESKTOP VIDEO

Easily broadcast your webcam video from your desktop into your meeting.

1. Click the Meeting drop-down menu at the top of the meeting interface and select **Enable Desktop Video**.
2. Upon meeting start, click **Broadcast My Video**.
3. Select the video device in the drop-down menu and click **OK**.

UPLOAD A PICTURE OR OTHER IMAGE TO BROADCAST IN A MEETING

1. In the Conference Manager, go to Resources, then Images.
2. Click **Upload Image** and follow the upload wizard.
3. During the meeting, to display the image, click the Meeting drop-down menu on the top of the interface. Select **Meeting Options**, check **Display Image**, select the image from the pull-down and click **OK**. The image will be displayed in the top of the meeting interface.

ARCHIVING

Extend the reach of your meeting by archiving it for future playback.

1. Click the Meeting drop-down menu at the top of the meeting interface and select **Record Archive**.
2. Name the archive and select **Voice** and/or **Web**.
3. Click **Record**. The web recording will begin immediately. The audio recording session will begin after you hear the voice prompt, “This session will now be recorded,” followed by a beep.
4. Click **Stop** to end the recording.
5. After the meeting, you can retrieve the archive in the Conference Manager, under Conferencing/Archives.

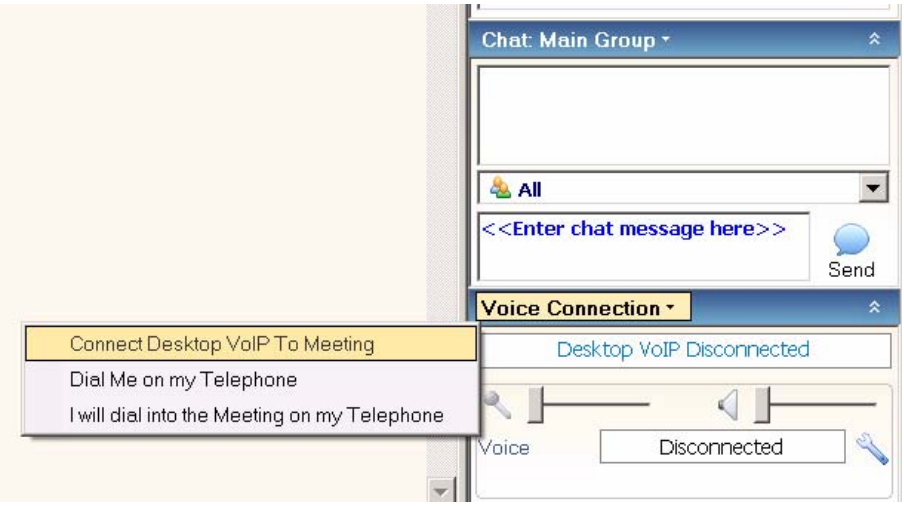
Note: Additional charges will apply.

DESKTOP VOIP

Connect to the audio portion of an online meeting via Voice over IP. All you need is an Internet connection and headset with microphone connected to your computer.

1. To connect via Desktop VoIP upon joining a meeting, simply click **Connect via Desktop VoIP** in the first Quick Start menu.

2. Easily toggle between telephone and Desktop VoIP connection during a meeting via the **Voice Connection** panel.



Integrated or Standalone Audio Conferencing

Unified Meeting integrates with BroadData Reservationless Audio Conferencing provide an on-demand audio conferencing solution that allows you to initiate a conference call 24/7 without the need to make a reservation or rely on an operator.

STARTING A RESERVATIONLESS AUDIO CONFERENCE CALL

1. Dial your Reservationless Audio Conferencing dial-in number.
2. When prompted, enter your conference code followed by #.
3. When prompted, press ***** to identify yourself as the leader, then enter your leader PIN followed by #.
4. Press **1** to begin your conference or press **2** to change your default conference options.
5. If the security pass code option is enabled you will be prompted to enter the pass code at this time.

JOINING A RESERVATIONLESS AUDIO CONFERENCE CALL

1. At the specified time, dial the Reservationless-Plus dial-in number provided by the moderator.
2. When prompted, enter the conference code followed by #.

AUDIO KEYPAD COMMANDS

Control your conference call with a touch of a button on your telephone keypad.

*0	Operator assistance - conference
00	Operator assistance - individual
*1	Dial-out to a participant - moderator only
*2	Begin/end conference record - moderator only
*3	Change entry/exit method (recorded names, tones, silence) - moderator only
*4	Private roll call

*5 / #5	Mute/unmute all lines except leader's - moderator only
*6 / #6	Mute/unmute your own line
*7 / #7	Lock/unlock conference (including operator) - moderator only
*8	Allow/disallow conference continuation - moderator only
*9	Start/join sub-conferencing
11	Bypass hold music to enter leader PIN and start call as leader
*51 / #51	Lecture mode on/off - moderator only
#99	Disconnect all lines except leader's - moderator only
*#	Private participant count
**	List available keypad commands

Customer Service and Support

TECHNICAL SUPPORT AND ACCOUNT ASSISTANCE

Technical support	877.769.7229
Technical support during conference	On your phone keypad: *0 (conference) or 00 (individual) On the web: Through the Unified Meeting interface: Help/Dial Customer Support