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Version 7.0.1 Package Contents

The Polycom WebOffice Version 7.0.1 software and documentation CD includes the following items:

- Polycom WebOffice software:
  - Polycom WebOffice Server
  - Polycom WebOffice Administrator Web Support
- Documentation:
  - Polycom WebOffice 7.0.1 Administrator's Guide
  - Polycom WebOffice 7.0.1 User's Guide
  - Polycom WebOffice 7.0.1 Release Notes

System Requirements

Server Requirements

Recommended Requirements

Following are the Polycom WebOffice Server recommended requirements:

- Pentium-4 1GHz and higher (dual processor recommended)
- 1024 MB RAM
- Internet Connection - LAN to router connected to the Internet at 1.5 Mbps or higher
- 100 Mbps PCI network adapter providing LAN connection
- 40 GB on disk (required for System/SW/Session, and for Offices data + spare), preferably high speed SCSI supporting 160 Mbps transfer rate (3x18GB full RAID recommended)
- Software
- Environment
  - Firewall protection - usually TCP port 80 (HTTP) and ICMP are to be open for inbound traffic toward the server with state-full inspection activated
  - Optional - working in TCP mode port 83
Minimum Requirements

Following are the Polycom WebOffice Server minimum requirements:

- Minimum Server Specs for WebOffice License levels:
  - 5 Licenses - Pentium-III 700 MHz, 500 MB RAM and 10 GB hard disk with 512 Kbps connection
  - 25 Licenses - Dual Pentium-III 500 MHz, 1 GB RAM and 40-GB hard disk with 1.0 Mbps connection
  - 100 Licenses - Pentium-4 1.2 GHz, 1 GB RAM and 60-GB hard disk with RAID 0, 1.0 Mbps or higher connection
  - 250 Licenses - Dual Pentium-4 2.x GHz, 2 GB of RAM and 100-GB hard disk with RAID, 1.5 Mbps connection
  - 500 or more - Dual Pentium-4 with highest speed, 2 GB of RAM minimum and 20-GB install disk and 100-GB data disk with the data disk RAID 5 Striped, with 1.5 Mbps or higher connection

- Software
  - Windows 2000 Server

- Environment
  - Firewall protection - only TCP port 80 (or any other port the server was configured to work with) (HTTP) and ICMP are to be open for inbound traffic towards the server with state-full inspection activated

Client Software Requirements

Following are the Polycom WebOffice Client software recommended requirements:

- Standard Pentium-III 600 (or higher) Windows PC
- Software
  - Windows 2000/XP
  - IE 4.0 and higher / Netscape 7 and higher
- Environment
  - 128 MB RAM and higher
  - Internet connection - 128 Kbps and higher

Web Client Software Requirements

Following are the Polycom WebOffice Web Client software minimum requirements:

- Software
  - Windows 2000/ME/XP, Mac or Linux
  - Windows OS: IE 5.0 and higher / Netscape 7.0 and higher
  - Mac OS: IE for Mac 5.2 and higher / Netscape 7.1 and higher
  - Linux OS: Netscape 7.1 and higher
- Environment
  - Internet connection
Meeting Conference Requirements

Following are the Polycom WebOffice configuration requirements for audio and video meetings:

- Audio conference
  - MGC VoicePlus or Voyant OCI
  - WebCommander - optional but recommended when working with MGC unit version 5.0 and lower

- Point-to-Point video conference
  - ViaVideo I and II, software version 4.0 and higher / ViewStation endpoints. ViewStation models include ViewStation FX, ViewStation EX, ViewStation FS 4000 - software version 5.1 and higher, and ViewStation VSX 7000 - software version 5.0 and higher.
  - Gatekeeper (PathNavigator is recommended) - optional but recommended

- Multipoint video conference
  - Polycom MGC version 6.1 higher
  - ViaVideo I and II, software version 4.0 and higher / ViewStation endpoints. ViewStation models include ViewStation FX, ViewStation EX, ViewStation FS 4000 - software version 5.1 and higher, and ViewStation VSX 7000 - software version 5.0 and higher.
  - WebCommander - optional but recommended when working with MGC unit version 5.0 and lower
  - Gatekeeper (PathNavigator is recommended) - needed for IP
Installing Polycom WebOffice server

Activating WebOffice

The activation key code to activate Polycom WebOffice is received directly from the Polycom Web site. The activation key code must then be entered in the WebOffice Administrator’s page to activate WebOffice. This procedure must be performed prior to using WebOffice.

To activate your Polycom WebOffice:
2. If necessary, create a New User Account. If you already have a user account, log in.
3. Click the **Product Activation** link.

![Product Activation page](image)

The **Product Activation** page opens.

![Product Activation details](image)

4. Under **Single License Number** enter the **License Number** that is located on the back label of your WebOffice CD ROM.

5. Press the TAB key.

6. License number will be identified and **First Time Installation** checkbox will appear.

7. Check **First Time Installation** checkbox and **Serial Number** will appear.
8. Click the **Generate** button and **Key Code** will be obtained.

9. Open your **WebOffice** Administrator’s tool.

10. In the **Main Menu** pane, click **Install/Upgrade License**.

   The Install/Upgrade License page opens.

11. In the **Key Code** box and the **Serial Number**, enter the activation key code and serial number received from the Polycom Web site.

12. Click **Submit** to complete the **WebOffice** activation.

   To upgrade your **WebOffice** license (add more offices, etc.) you must receive a new Key Code and repeat the above procedure.
New Installation

To install the Polycom WebOffice software package for the first time:
1. Insert the CD into the CD drive.
2. From the Start menu, select Run.
3. Enter D:/Setup, where D is the CD drive name, and then click OK.

Installation Wizard
Follow the on screen instructions to complete the installation process.
1. In the Software License Agreement window, select I accept the agreement and click Next to accept and continue.

2. Click Next.

The Information window opens detailing your server information.
3. Click Next.

The Settings window opens.

4. The check box **I want my server to be accessed from both Internet and Local Network** is selected by default. This allows your WebOffice server act as both an Intranet (internal to the resident LAN) and Internet server (default installation). If this check box is cleared, the WebOffice server acts as an internal LAN server only.

The next Settings window opens.
5. If you have chosen to install the WebOffice Server as an Internet server, you are prompted to enter the URL. The URL follows the format www.polycom.com. This is a typical URL structure, derived from the combination of the host and domain name. Click Next to continue.

![Settings window](image)

6. The default port is 80. If you need to use a different port for HTTP, enter the port number. Any port can be used assuming that no other process is using this port.

7. Enter the SMTP server address. This can be a URL or an IP number.

8. Enter the administrator password. Re-enter your password for confirmation. This is the username for controlling the WebOffice Instant Messaging Service from the Web. This Web interface enables the server administrator to add, remove and administer offices and users.

9. Select the target path for the installation and click Next to continue.

The following Settings window opens.

![Settings window](image)

Select the MCU that will be used to run audio conferences; MGC VoicePlus, Voyant OCI or None/Other. Click Next to continue.

This option can be changed by the Administrator in the Administrator's Tool - Portal Deployment.
The following Settings window opens.

10. Enter the WebOffice Administrator e-mail address. The administrator receives e-mail from the server every time an office is created.

11. Enter the WebOffice Support e-mail address. This is the address that will receive e-mails from users seeking support.

12. Enter the WebOffice Sender e-mail address. This is the e-mail address that is shown in the Reply To line of sent e-mails. Click Next to continue.

The languages selection window opens.

13. Click Next to continue.
The Ready to Install window opens.

14. Click **Next** to install the Polycom WebOffice server.

When the installation is complete the Setup Complete window opens.

15. Click **Finish** to complete the installation process.

You must go to the Administrator's Tool to configure WebOffice to properly run audio and video meetings. If you want to go directly the Administrator's Tool, select the **Yes, I want to run the Admin tool now** check box, and click **Finish** to complete the installation process.
Update an Existing 6.X Version

The following section describes how to update an existing 6.X version of WebOffice to version 7.0.1.

To update an existing Polycom WebOffice software package:
1. Insert the CD into the CD drive.
2. From the Start menu, select Run.
3. Enter D:/Setup, where D is the CD drive name, and then click OK.

Installation Wizard

Follow the on screen instructions to complete the installation process.
1. The following Setup window opens, indicating that an older version of WebOffice exists on your computer. Click Next to continue with the installation.

The Software License Agreement window opens.
2. Select I accept the agreement and click Next to accept and continue.

3. Click Next.
The **Settings** window opens.

4. The check box **I want my server to be accessed from both Internet and Local Network** is selected by default. This allows your WebOffice server act as both an Intranet (internal to the resident LAN) and Internet server (default installation). If this check box is cleared, the WebOffice server acts as an internal LAN server only. The next **Settings** window opens.

5. If you have chosen to install the WebOffice server as an Internet server, you are prompted to enter the URL. The URL follows the format [www.polycom.com](http://www.polycom.com). This is a typical URL structure, derived from the combination of the host and domain name. Click **Next** to continue.
The next Settings window opens.

6. The parameters are taken from the old installation and entered by default in the fields. If you do not want to change the parameters, click Next to continue and proceed with Step 11.

7. The default port is 80. If you need to use a different port for HTTP, type the port number. Any port can be used assuming that no other process is using this port.

8. Enter the SMTP server address. This can be a URL or an IP number.

9. Enter the administrator password. Re-type your password for confirmation. This is the username for controlling the WebOffice Instant Messaging Service from the Web. This Web interface enables the server administrator to add, remove and administer offices and users.

10. Select the target path for the installation and click Next to continue.

The next Settings window opens.

11. Select the MCU that will be used to run audio conferences; MGC VoicePlus, Voyant OCI or None/Other. Click Next to continue.

This option can be changed by the Administrator in the Administrator’s Tool - Portal Deployment.
The next *Settings* window opens.

12. The parameters are taken from the old installation and entered by default in the fields. If you do not want to change the parameters, click **Next** to continue and proceed with Step 15.

13. Enter the WebOffice Administrator e-mail address. The administrator receives e-mail from the server every time an office is created.

14. Enter the WebOffice Support e-mail address. This is the address that will receive e-mails from users seeking support.

15. Enter the WebOffice Sender e-mail address. This is the e-mail address that is shown in the *Reply To* line of sent e-mails. Click **Next** to continue.

The next *Settings* window opens.

16. To maintain your previous WebOffice customization, select **I want to retain my previous customization**.

   To install the default customization, select **I want to install default customization** (default).

   To restore a previously backed up customization, select **I want to restore a previously backed up customization**, and browse to the directory where the customization is saved.

17. Click **Next** to continue.
The languages selection window opens.

18. Click Next to install the Polycom WebOffice server.
   When the installation is complete the Setup Complete window opens.

19. Click Finish to complete the installation process.
20. You must go to the Administrator's Tool to configure WebOffice to properly run audio and video meetings. If you want to go directly the Administrator's Tool select the Yes, I want to run the Admin tool now check box, and click Finish to complete the installation process.

The Administrator's Tool can be accessed at anytime by entering the address of the WebOffice Admin site in your Web browser. The syntax is as follows:
http://<WebOffice_URL>/content/Admin
where <WebOffice_URL> is your organization's WebOffice URL.
Uninstalling Polycom WebOffice Server

During the installation process, uninstall files are placed in the WebOffice folder. These files are used to aid the Windows operating system in uninstalling the application.

To uninstall the WebOffice Software package:
1. On the Start-Programs menu click Settings, and then click Control Panel.

The Control Panel window opens.

2. Click the Add/Remove Programs icon.
The *Add/Remove Programs* window opens.

3. Select **Polycom WebOffice Server** from the list of installed software, and click the **Change/Remove** button.

4. The *WebOffice* software is uninstalled.
Polycom WebOffice License Upgrade

To upgrade your existing Polycom WebOffice Server license, (add more offices, etc.), you must receive a new Serial Number and repeat the steps in “Activating WebOffice” on page 4.
**WebOffice and MGC Configuration**

This section explains the MGC settings for WebOffice to work with MGC version 6.01.

**WebOffice MGC Settings**

There are two WebOffice working modes with the MGC unit:

- Via WebCommander server
- Direct Management Mode

The working mode is defined by the WebOffice Administrator in the Administrator’s Tool.

If your MGC Unit is version 5.0 or lower, you cannot work in MCU Direct Management mode, only in WebCommander mode.

When working in the Direct Management mode, when you launch an audio or video conference running on the MGC unit, you have to configure WebOffice to work with the MGC unit.

The MGC unit works with the WebOffice server as an external database application that is used for personal recognition of all conference participants and their attached endpoints.

For certain WebOffice features to be enabled, such as Personal Layout, Active Speaker and Mute/Unmute, the WebOffice server must work in MCU Direct Management mode, and the WebOffice server must serve as an external database application with the MGC unit. If you work in MCU Direct Management mode without IVR Message Services, the Personal Layout, Active Speaker and Mute/Unmute features will be disabled.

When an Audio or Video conference is started from WebOffice, the WebOffice server generates a list of passwords for each conference participant. These passwords are sent from the MGC unit to the WebOffice server for validation. (The password displayed in MGC Manager conference properties is different than the password WebOffice displays in the meeting.) The WebOffice server returns to the MGC unit permission to add the participants to the conference, and also send their names to the MCU. These names are also used in the MGC Manager/WebCommander applications to list the participants by their names. The participants are then added to the conference along with their names.

A guest password is also generated when the conference is started. This password is displayed to the conference organizer (WebOffice owner) and to all connected participants. This password can be used by participants who are disconnected, and be given to guests to manually dial-in to the conference. Participants using the manual password to connect to the conference are identified as ‘guest’ (without a user name).

The process is as follows:

1. The WebOffice conference is started by the WebOffice client.
2. The WebOffice server automatically generates a list of passwords for all invited buddies connecting to the conference.
3. The WebOffice server sends a request to the MGC unit to start a conference.
4. The MGC unit starts a conference and tells the WebOffice server the conference number.
5. The WebOffice server sends the conference number and personal passwords to the WebOffice clients connected to the conference.
6. The WebOffice clients dial to the MCU and automatically enter the passwords.

7. The MGC unit sends back a list of passwords to the WebOffice server to identify the connected participants.

**WebOffice and MGC Configuration**

To enable the MGC unit to use WebOffice as the external database application for authentication, the following operations must be performed:

1. Configure the WebOffice server to work in Direct Management mode, and to use IVR Message Services. This is done by the WebOffice Administrator from the WebOffice Administrator’s Tool.

2. Configure the MGC unit to use the external database application. For MGC version 6.0, you must set the appropriate flag in the system configuration file, configure an XML file with details about the external database application (WebOffice server), and send the file to the MCU.
   
   For MGC versions 6.01 and higher, you must set the appropriate flags in the system configuration file.

3. Configure the IVR Message Service used by the WebOffice server. The configurations are performed using the MGC Manager.
Configuring the WebOffice Server

Configuring the WebOffice server to work in Direct Management mode, and to work with IVR Message Services is done by the WebOffice Administrator from the WebOffice Administrator’s Tool.

To configure the WebOffice server:
1. Open the WebOffice Administrator’s Tool.
2. In the Main Menu pane, click Video/Audio Parameters.
3. In the Select box, make sure MCU Direct Management is selected (this is the default mode).
4. In the MCU’s List, click the Add button to add a new MCU.
The *Add New MCU* dialog box opens.

![Add New MCU Dialog Box](image.png)

### Add new MCU

**General**
- **Name**: 
- **IP Address**: 
- **Login Name**: 
- **Password**: 
- **Confirm Password**: 
- **Port**: 1205
- **MCU Order**: 1

**Audio Templates**
- Audio + DVR
- Video with DVR service

**Video Templates**
- Video + DVR
- Video with DVR service

**IP**
- **Gatekeeper**: 
- **H.323 Prefix**: 
- **SIP Service Name**: 
- **SIP Prefix**: 

**Dual H.323 Configuration**
- **External H.323 Service Name**: 
- **Internal H.323 Service Name**: 
  - Currently no internal IP ranges are defined.

**ISDN**
- **ISDN Prefix**: 
- **Dialing Rule Set**: 
- **Conference Number includes Country Code**: 
- **Conference Number includes Area Code**: 

* Indicates a required field

[Add] [Cancel]
5. Define the following parameters:

Table 1: Add New Device - MCU Field

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General</strong></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>The name of the MCU. Specify a name that clearly identifies the MCU.</td>
</tr>
<tr>
<td>IP Address</td>
<td>The IP address of the MCU. The IP address of the MCU should be obtained from your network administrator and should be identical to the one configured in the MCU during the first entry settings.</td>
</tr>
<tr>
<td>Login Name</td>
<td>The MCU login name. The default is Polycom.</td>
</tr>
<tr>
<td>Password</td>
<td>The MCU password. The default is Polycom.</td>
</tr>
<tr>
<td>Confirm Password</td>
<td>Confirm the WebOffice password.</td>
</tr>
<tr>
<td>Port</td>
<td>The MCU port.</td>
</tr>
<tr>
<td>MCU Order</td>
<td>This number indicates the order in which the MCU will appear in the list. When MCU Hunting is set to Auto, the system searches the MCU list for the first MCU that has enough resources to run the conference.</td>
</tr>
<tr>
<td>Audio Templates</td>
<td>Select the template that has been configured to work with IVR Message Services. By default this is Audio + IVR.</td>
</tr>
<tr>
<td>Video Templates</td>
<td>Select the template that has been configured to work with IVR Message Services. By default this is Video + IVR.</td>
</tr>
<tr>
<td><strong>IP</strong></td>
<td></td>
</tr>
<tr>
<td>Gatekeeper</td>
<td>The MCU Gatekeeper address.</td>
</tr>
<tr>
<td>H.323 Prefix</td>
<td>The H.323 prefix for the MCU.</td>
</tr>
<tr>
<td>SIP Service Name</td>
<td>The SIP service name (optional).</td>
</tr>
<tr>
<td>SIP Prefix</td>
<td>Currently not relevant.</td>
</tr>
<tr>
<td>Dual H.323 Card Configuration</td>
<td>Select this check box if there is more than one H.323 card</td>
</tr>
<tr>
<td>External H.323 Service Name</td>
<td>Specify the external service name as seen in the MGC Manager. This is relevant if you have more than one H.323 card and one of them is external (using a valid IP and pointing to the Internet or other network).</td>
</tr>
<tr>
<td>Internal H.323 Service Name</td>
<td>Specify the internal service name as seen in the MGC Manager. This is relevant if you have more than one H.323 card and one of them is internal.</td>
</tr>
<tr>
<td>Internal IP ranges list</td>
<td>The range of the IP within your network.</td>
</tr>
<tr>
<td><strong>ISDN</strong></td>
<td></td>
</tr>
<tr>
<td>ISDN Prefix</td>
<td>The ISDN prefix for the MCU.</td>
</tr>
</tbody>
</table>
6. Click Add.
7. The MCU is added to the MCU’s List.
8. To update an existing MCU, click on the Properties link of the MCU to be used with the WebOffice server.

The Update MCU dialog box opens.
9. Select the **Audio and/or Video Template** that has been configured to work with IVR Message Services. By default this is Audio + IVR and Video + IVR.

10. Click **Update** to save the settings.
Configuring the MGC Unit to use an External Database Application for MGC Version 6.0

Configuring the MGC unit to use an external database application for Polycom MGC version 6.0 consists of two procedures: setting a flag in the system configuration file, and editing an XML configuration file and sending it to the MCU.

Setting the External Database Access Flag

You must configure the MCU to access an external database application for validation and authentication. This is done in the file system configuration file (system.cfg).

To set the external database access flag in the system.cfg:
1. In the MGC Manager application, double-click the MCU icon. Alternatively, right-click on the MCU icon, and click Connect.
2. Right click the **MCU Utils** icon, and then click **Edit "system.cfg"**.

   ![Image of SysConfig dialog box](image)

   The **SysConfig** dialog box opens.

3. In the **Section** pane, double-click the **GREET AND GUIDE/IVR** option.

   ![Image of GREET AND GUIDE/IVR flags](image)

   The **GREET AND GUIDE/IVR** flags are displayed in the **Item=Value** pane.
4. In the Item=Value pane, click the ENABLE_EXTERNAL_DB_ACCESS item.

5. In the Edit value text box, enter the value YES.

6. Click the Set value button to apply the new value to the system configuration file.

7. Click OK.

   A confirmation dialog box opens.

8. Click Yes to confirm.

**Configuring the XML Configuration File**

The External DB Tools folder in the MGC Manager software kit contains a file named apserver.xml, which is used to define information related to the external database application. The apserver.xml file must be edited and sent to the MCU.

The initial contents of the apserver.xml file are as follows:

```xml
<APPServer_Configuration_file>
  <Servers_List>
    <Server_Data>
      <IP>172.22.133.41</IP>
      <Port>5001</Port>
      <Login>ACCORD</Login>
      <Password>ACCORD</Password>
      <Directory>McuIntegration</Directory>
    </Server_Data>
  </Servers_List>
</APPServer_Configuration_file>
```
To configure the apserver.xml file and send it to the MCU:

1. Copy the apserver.xml file to your local disk.
2. Open the file in a text editor application.
3. Edit the values of the following elements:

   Table 2: apserver.xml File Configuration

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>IP</td>
<td>The IP address of the external application server. Enter the IP address of the WebOffice server.</td>
</tr>
<tr>
<td>Port</td>
<td>The port number used by the MCU to access the external application server. When working with the WebOffice server, use port 5001 or 1205.</td>
</tr>
<tr>
<td>Login</td>
<td>The user name defined in the external database application for the MCU. For the WebOffice application, the default user name is: ACCORD.</td>
</tr>
<tr>
<td>Password</td>
<td>The password associated with the user name defined for the MCU in the external database application. For the WebOffice application, the default password is: ACCORD.</td>
</tr>
<tr>
<td>Directory</td>
<td>The URL of the external database application. For the WebOffice server, this is Mcuintegration.</td>
</tr>
</tbody>
</table>

4. Save the new values and close the file.
5. Send the edited apserver.xml file to the MCU using the MGC Manager: In the MGC Manager application, right-click the MCU icon, click MCU Utils and then click Send File.
6. Reset the MCU.
Configuring the MGC Unit to use an External Database Application for MGC Versions 6.01 and Higher

Several flags must be set in the system configuration file (system.cfg) to define information related to the external database application when configuring the MGC unit to use an external database application for Polycom MGC versions 6.01 and higher.

To set the external database flags in the system configuration file:
1. In the MGC Manager application, right-click on the MCU icon.

A pop-up menu opens.
2. Click the MCU Utils option, and then click Edit "system.cfg".
The `SysConfig` dialog box opens.

3. In the `Section` pane, double-click the `External DB` option. The `External DB` flags are displayed in the `Item=Value` pane.

4. In the `Item=Value` pane, click the `ENABLE_EXTERNAL_DB_ACCESS` item. The item's value is placed in the `Edit value` text box.

5. In the `Edit value` text box, enter the value `YES`.

6. Click the `Set value` button.

7. Repeat steps 4 to 6 to set the values of the following flags:

<table>
<thead>
<tr>
<th>Table 3: SysConfig.cfg Flag Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Element</strong></td>
</tr>
<tr>
<td>---------------</td>
</tr>
<tr>
<td><code>EXTERNAL_DB_IP</code></td>
</tr>
<tr>
<td><code>EXTERNAL_DB_PORT</code></td>
</tr>
<tr>
<td><code>EXTERNAL_DB_LOGIN</code></td>
</tr>
</tbody>
</table>
8. Click **OK**.

9. Open the **SysConfig** dialog box again.

10. In the **Section** pane, double-click the **GREET AND GUIDE\IVR** option.

<table>
<thead>
<tr>
<th><strong>Table 3: SysConfig.cfg Flag Configuration</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Element</strong></td>
</tr>
<tr>
<td>EXTERNAL_DB_PASSWORD</td>
</tr>
<tr>
<td>EXTERNAL_DB_DIRECTORY</td>
</tr>
</tbody>
</table>

The flags are displayed in the **Item=Value** pane.

11. In the **Item=Value** pane, click the **QUICK_LOG_IN_VIA_ENTRY_QUEUE** item.
The item's value is placed in the *Edit value* text box.

12. In the *Edit value* text box, enter the value **NO**.
13. Click the *Set value* button.
14. Click **OK**.

For more details on the *QUICK_LOG_IN_VIA_ENTRY_QUEUE* flag, refer to the *MGC Manager Release Notes, Version 6.01*. 
Configuring IVR Message Services to Verify Participant Passwords

IVR Message Services must now be configured to work with the external database. This is done from the MGC Manager. Following are instructions for configuring IVR Message Services to verify conference passwords with an external database application.

To define a new IVR Message Service:
1. Connect to the MGC unit (MCU).
2. Expand the MCU tree.
3. Expand the MCU Configuration tree.
4. Right-click the IVR Services icon, and then click New IVR Service.

The IVR-Global dialog box opens.

This dialog box enables you to define the general parameters of the IVR Service.
5. Define the following parameters:

Table 4: IVR - Global Parameters

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>IVR Service Name</td>
<td>Enter the name of the IVR Message Service.</td>
</tr>
<tr>
<td>Language for IVR</td>
<td>Select the language in which the Audio Messages and prompts will be heard. The languages are defined in the IVR Properties dialog box. For more details, refer to the MGC Manager User’s Guide, Volume II, Chapter 2.</td>
</tr>
<tr>
<td>External Server Authentication</td>
<td>Select Always. The MCU must work with an external database application to validate a participant’s rights in the conference. The external database contains a list of participants (users), with their assigned parameters. The password entered by the participant is compared against the database. If the system finds a match, the participant is validated.</td>
</tr>
<tr>
<td>Number of User Input Retries</td>
<td>Enter the number of times the participant is able to respond to each menu prompt before the participant is disconnected from the MCU or waits for the operator’s assistance.</td>
</tr>
<tr>
<td>Timeout for User Input</td>
<td>Enter the duration, in seconds, that the system waits for input from the participant before it is considered as an input error.</td>
</tr>
<tr>
<td>DTMF Delimiter</td>
<td>The interaction between the caller and the system is done via touch-tone signals (DTMF codes). Enter the key that will be used to indicate a DTMF command sent by the participant or the conference chairperson. Possible keys are the pound key (#) or star (*).</td>
</tr>
</tbody>
</table>

6. Click **Next**.

The Welcome Message dialog box opens.
7. Select the *Enable Welcome Message* check box to define the system behavior when the participant enters the conference IVR queue. You can select whether to play a general Welcome message, a conference-specific message or wait for the operator’s assistance.

Table 5: Welcome Message Parameters

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Welcome Message</td>
<td>Select <strong>None</strong> if no general message is to be played or if you want only the conference specific message to be played. Select the message to be played when the participant first connects to the conferencing service and enters the conference IVR queue. The list includes all the audio files that were downloaded to the MGC unit’s memory for this Message type. If you have not downloaded the audio files prior to the definition of the IVR Service, click the <strong>Add Message File</strong> button to download the audio file now.</td>
</tr>
<tr>
<td>Enable Conference Welcome Message</td>
<td>Select this check box to enable a conference-specific message. Select the message the participant will hear when connecting to the conference. The list includes all the audio files that were downloaded to the MGC unit’s memory for this Message type. If you have not downloaded the audio files prior to the definition of the IVR Service, click the <strong>Add Message File</strong> button to download the audio file now. For more details, see step 7 of this procedure.</td>
</tr>
<tr>
<td>On Hold for Operator Assistance</td>
<td>Clear this check box when working with the WebOffice server and conferences.</td>
</tr>
</tbody>
</table>

8. To download an audio file for a specific message, click the **Add Message File** button next to the message type.

The **Install File** dialog box opens.

a. Click the **Browse** button to select the audio file (*.aca) to download.

   The **Select Source File** dialog box opens.

b. Select the appropriate audio file of type *.aca using the standard Windows conventions, and then click the **Open** button.
The name of the selected file appears in the Install field in the Install File dialog box.

c. In the Install File dialog box, click Yes to download the file to the MCU memory. The Done dialog box opens.

d. Click OK to confirm and return to the IVR Properties dialog box. The new audio file can now be selected from the list of audio messages.

9. Click Next.

The Conference Chairperson dialog box opens.

10. Select the Enable Chairperson Messages check box to enable a participant to connect to the conference as a chairperson and play the appropriate messages while the participant waits in the conference IVR queue. (This is optional.)

11. Select the various audio messages and prompts that will enable the participant to identify himself/herself as a chairperson:

Table 6: Conference Chairperson parameters

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chairperson Identifier Request</td>
<td>Select the audio file requesting the participant to enter the key that identifies himself/herself as the conference chairperson.</td>
</tr>
<tr>
<td>Request Chairperson Password</td>
<td>Select the audio file prompting the participant for the Chairperson password.</td>
</tr>
<tr>
<td>Chairperson Password Failure Message</td>
<td>Select the audio file requesting the participant to re-enter the Chairperson password if the participant failed to enter it correctly.</td>
</tr>
<tr>
<td>Chairperson Identifier Key</td>
<td>Enter the key that will be used to identify the participant as a chairperson. Possible keys are: pound key (#) or star (*).</td>
</tr>
<tr>
<td>Use Chairperson Password as Conference Password</td>
<td>Select this check box to enable the chairperson to connect to the conference as chairperson by entering only his/her chairperson password instead of entering two passwords: the conference entry password and the chairperson password. Note: The chairperson password must be different from the conference entry password.</td>
</tr>
<tr>
<td>Billing Code</td>
<td>Select this check box to enable the chairperson to enter a code for billing purposes.</td>
</tr>
</tbody>
</table>
12. Click **Next**.

The Conference Password dialog box opens.

13. Select the **Enable Password Message** check box. This requests the conference password before moving the participant from the conference IVR queue to the conference.

14. Select **Request password** for dial-in and dial-out participants. The system requests the participant to enter the conference password, and after the correct conference password is provided, moves the participant to the conference.

15. Select the various audio messages that will be played:

*Table 7: Conference Password parameters*

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Password</td>
<td>Select the audio file that prompts the participant for the conference password/PIN Code. This field is mandatory.</td>
</tr>
<tr>
<td>Retry Password</td>
<td>Select the audio file that requests the participant to enter the conference password/PIN Code again when failing to enter the correct password/PIN Code.</td>
</tr>
<tr>
<td>Request digit</td>
<td>Select the audio file that prompts the participant to press any key. Select it for dial out.</td>
</tr>
</tbody>
</table>

16. Click **Next**.
The *General* dialog box opens.

The *General* dialog box lists additional audio messages and prompts that may be played before joining the conference or during the conference.

The following messages and prompts can be enabled:

### Table 8: General Voice Messages

<table>
<thead>
<tr>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lock On</strong></td>
<td>Indicates that the conference is now locked to dial-in participants. This message is played to all the conference participants.</td>
</tr>
<tr>
<td><strong>Lock Off</strong></td>
<td>Indicates that the conference is now unlocked to dial-in participants. This message is played to all the conference participants.</td>
</tr>
<tr>
<td><strong>Billing Number</strong></td>
<td>A message requesting the participant to enter a code for billing purposes.</td>
</tr>
<tr>
<td><strong>Secure On</strong></td>
<td>Indicates that the conference status has changed to secure conference. This message is played to the conference when the chairperson secures the conference and it cannot be entered by any additional participant or the system administrator/operator. In this mode, the operator cannot monitor the participants and can only terminate the conference. The conference may be secured and unsecured by the chairperson via DTMF commands.</td>
</tr>
<tr>
<td><strong>Secure Off</strong></td>
<td>Indicates that the conference status has changed from secure conference to normal. This message is played to the conference when the chairperson cancelled the secured mode and the conference returned to its normal state.</td>
</tr>
<tr>
<td><strong>First to Join the Conference</strong></td>
<td>This message is played when the participant is the first person to join the conference (to clarify the silence).</td>
</tr>
<tr>
<td><strong>Conference Locked</strong></td>
<td>Indicates that a conference is locked. This message is played to a participant who wants to join a locked conference, informing the participant that currently he/ she cannot join the conference.</td>
</tr>
<tr>
<td><strong>Mute All On</strong></td>
<td>Indicates that all participants are muted. This message is played to the conference to inform all participants that they are muted (with the exception of the conference speaker).</td>
</tr>
</tbody>
</table>
Mute All Off Indicates that all participants are unmuted. This message is played to the conference to inform all participants that they are unmuted (and that the Mute All Except Me mode was cancelled).

End Time Alert Indicates that a conference is about to end. This message is only played when the conference is about to end and it cannot be extended.

Self Mute A confirmation message that is played when the participant requests to mute his/her line.

Self Unmute A confirmation message that is played when the participant requests to unmute his/her line.

Chairperson Help Menu 1 A help menu which is played upon a request from the chairperson. It lists the operations that can be performed by the chairperson and their respective DTMF Codes to participants requesting it. The playback can be stopped any time. The voice message that can be recorded for one Help file is limited to 30 seconds. You can have two audio files played one after the other as a single menu. The grouping of two Audio files into one help menu can be done for the Chairperson Help menu (and also for the Participant Help menu). If you configure two help menu messages, these two messages are heard in sequence as one menu. This is the first file that will be played.

Note: If you intend to modify the default DTMF codes, the default voice message files for the help menus that are shipped with the system will have to be replaced with new recordings that list the new DTMF codes. The help menus are usually recorded by the conferencing service provider as voice messages and are configured like any other voice message in the system.

Chairperson Help Menu 2 The audio file containing additional DTMF codes that can be used by the chairperson when two help menu messages are recorded for the chairperson operation. This file will be played after the file assigned to the Chairperson Help Menu 1.

Participant Help Menu 1 The audio file listing DTMF codes that can be used by the ordinary participant. The voice message that can be recorded for one Help file is limited to 30 seconds. To overcome this limitation you can have two audio files played one after the other as a single menu. This is the first file that will be played.

Participant Help Menu 2 The audio file listing additional DTMF codes that can be used by the ordinary participant when two help menu messages are recorded for the participant operation. This file will be played after the file assigned to the Participant Help Menu 1.

Invite Help Menu The audio file listing DTMF codes available to the participant/chairperson during the Invite session.

Voting Help Menu The audio file listing DTMF codes available to the participant/chairperson who controls the voting session (depending on the configuration in the DTMF codes dialog box).

Table 8: General Voice Messages

<table>
<thead>
<tr>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mute All Off</td>
<td>Indicates that all participants are unmuted. This message is played to the conference to inform all participants that they are unmuted (and that the Mute All Except Me mode was cancelled).</td>
</tr>
<tr>
<td>End Time Alert</td>
<td>Indicates that a conference is about to end. This message is only played when the conference is about to end and it cannot be extended.</td>
</tr>
<tr>
<td>Self Mute</td>
<td>A confirmation message that is played when the participant requests to mute his/her line.</td>
</tr>
<tr>
<td>Self Unmute</td>
<td>A confirmation message that is played when the participant requests to unmute his/her line.</td>
</tr>
<tr>
<td>Chairperson Help</td>
<td>A help menu which is played upon a request from the chairperson. It lists the operations that can be performed by the chairperson and their respective DTMF Codes to participants requesting it. The playback can be stopped any time.</td>
</tr>
<tr>
<td>Chairperson Help</td>
<td>The audio file containing additional DTMF codes that can be used by the chairperson when two help menu messages are recorded for the chairperson operation.</td>
</tr>
<tr>
<td>Participant Help</td>
<td>The audio file listing DTMF codes that can be used by the ordinary participant. The voice message that can be recorded for one Help file is limited to 30 seconds.</td>
</tr>
<tr>
<td>Participant Help</td>
<td>The audio file listing additional DTMF codes that can be used by the ordinary participant when two help menu messages are recorded for the participant operation.</td>
</tr>
<tr>
<td>Invite Help Menu</td>
<td>The audio file listing DTMF codes available to the participant/chairperson during the Invite session.</td>
</tr>
<tr>
<td>Voting Help Menu</td>
<td>The audio file listing DTMF codes available to the participant/chairperson who controls the voting session (depending on the configuration in the DTMF codes dialog box).</td>
</tr>
</tbody>
</table>
17. To assign the appropriate audio file (if one was downloaded) to the message type, click appropriate table entry.

The *Message Type* appears at the bottom of the table and the drop-down list of message files is enabled.

18. Select the appropriate audio file.

19. Repeat steps 16 and 17 to select the audio files for all the messages to be played during the conference. Message types to which no audio file is assigned will not be played during the conference.

20. Click **Next**.

The *Operator Assistance* dialog box opens.

![Operator Assistance dialog box]

21. Make sure that the **Enable Operator Assistance** check box is cleared as the *WebOffice* conference is unattended and no operator is available for assistance (unless configured differently).

22. Click **Next**.
The Roll Call dialog box opens.

23. Make sure the **Enable Roll Call** check box is cleared.
24. Click **Next**.

The Video Services dialog box opens.

25. Click the **Enable Video Services** check box to define a video IVR Service, and enable the Click&View application.
26. Define the following parameters:

<table>
<thead>
<tr>
<th>Table 9: Video Services</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Video Services</strong></td>
</tr>
<tr>
<td><strong>Click&amp;View</strong></td>
</tr>
</tbody>
</table>
27. Click **Next**.

The **DTMF Codes** dialog box opens.

<table>
<thead>
<tr>
<th>Video Services</th>
<th>Description</th>
</tr>
</thead>
</table>
| Video Welcome Slide | The Video Welcome Slide appears when an endpoint connects to a conference. Select the Video Slide file to be displayed when the participant connects to the conference. Select **None** if no Video slide is to be displayed. If the video slide file was not downloaded to the MCU prior to the IVR Service definition, click the **Add Slide** button. The **Install File** dialog box opens. The downloading process is similar to the downloading of audio files. For more details, see step 8 on page 37. **Notes:**  
  - The Video Welcome Slide files can be downloaded to the MCU. These slides must be prepared in advance.  
  - Only an H.320 video participant will see the slide when entering a conference. |

The participant interacts with the system while in the conference IVR queue or during the conference using touch-tone signals (DTMF codes) that are entered by pressing the appropriate key on the telephone/endpoint’s remote control.

This dialog box lists the default DTMF codes to the various functions that can be performed during the conference by all the conference participants or only by the conference chairperson. Usually a combination of signals activates a function. For example, entering *70 activates the Lock Conference feature.

28. To modify the DTMF code assigned to a function, in the **Name** field, click the function whose code you wish to modify.
The appropriate DTMF code appears at the bottom of the list.

29. In the DTMF Code (left) field, enter the new code.

30. In the Permission (right) field, select whether this function may be used by all the conference participants or only the chairperson.

31. Click Finish to complete the IVR Service definition.

The new IVR Message Service is added to the IVR Services list.

The number of IVR Services defined for a single MGC unit may not exceed 30 Services.
Version 7.0.1 - New Features List

The following table details the new features available in WebOffice Version 7.0.1.

**Table 10: Version 7.0.1 New Features List**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
</table>
| **General Features**          | **WebOffice Video Plug-in**  
The WebOffice Video Plug-in allows WebOffice users to use a broad variety of third party Web cameras to send and receive video steam, in addition to previously supported Polycom video endpoints in WebOffice. Additionally WebOffice users who do not have a video endpoint can receive the video stream of a WebOffice conference. |
|                               | **Windows Messenger Integration**  
WebOffice is available for integration with Microsoft Windows Messenger (Windows Messenger Integration mode), extending Windows Messenger’s capabilities to include Polycom’s multipoint audio and video conferencing. WebOffice works seamlessly with Windows Messenger and users can invite participants and start a multipoint conference directly from their instant messaging session with a click of the mouse. |
|                               | **Direct Video Call**  
Direct Video Call enables WebOffice users to communicate point-to-point directly with other WebOffice users without having to start a WebOffice conference. Additionally WebOffice users who do not have a video endpoint can receive the video stream of a from other non-WebOffice users. |
|                               | **Dial Out**  
WebOffice owners can select the dialing mode for their conference participants - dial-in or dial-out. Dial-out participants can join audio and/or video multipoint conferences with all endpoint types (both Polycom and non-Polycom) and will automatically connect to the conference. Conferences can include both WebOffice and non-WebOffice users. |
|                               | **WebOffice Language Selection**  
All WebOffice components are available in English, German, French, Chinese Simplified, Chinese Traditional, Japanese and Korean. |
|                               | **Polycom WebOffice Licensing**  
WebOffice can be registered from the Polycom Web site. |
| **WebOffice Manager Features**| **Selecting the Call Type: IP or ISDN**  
WebOffice users attached to a group endpoint can select their preferred call type for the conference endpoint: IP (H.323) or ISDN (H.320). |
|                               | **Conference Organizer**  
The Conference Organizer enables WebOffice users to manually dial-in or dial-out to conference participants. Participant’s connection dialing mode can be changed and you can review the conference details in a structured manner from one window. |
WebOffice Video Plug-in

The WebOffice Video Plug-in allows WebOffice users to use a broad variety of third party Web cameras in addition to supported Polycom video endpoints.

When the WebOffice Video Plug-in is installed, third party Web cameras are fully supported in WebOffice video conferences. In addition, the WebOffice Video Plug-in enables WebOffice users who do not have a video endpoint to receive the video stream of a WebOffice video conference or of a direct video call in real-time.

The following desktop endpoints are supported with WebOffice Video Plug-In:

- Creative NX Pro
- Creative Pro EX
- Dual Mode Camera 8006
- K2 - USB2
- Logitech Notebook Pro

Users who have the WebOffice Video Plug-in installed can also initiate and receive calls with non-WebOffice users via the direct call table in their WebOffice Manager. For more information, see “Direct Video Call” on page 70.

Users with supported Polycom video endpoints can also download the WebOffice Video Plug-in to enable them to use a Web camera interchangeably with their Polycom endpoint. However this is not advisable if you are a current ViaVideo user as the ViaVideo software interface is completely removed when the WebOffice Video Plug-in software is installed (you will not be able to use the ViaVideo application independently).
Requirements

Following are the minimum system requirements to install and run the WebOffice Video Plug-in software:

- Pentium 3, 1 Ghz
- Windows XP with Service Pack 1
- DirectX 9.0b

Downloading the WebOffice Video Plug-In Software

When a WebOffice user joins a video conference, the system automatically checks to see if the user has a supported Polycom video endpoint attached. If not, they are given the opportunity to download the WebOffice Video Plug-in software. The WebOffice Video Plug-in is installed as a standalone software, and is completely compatible with all WebOffice environments.

The WebOffice Video Plug-in software is for use with WebOffice only, and does not include its own user interface. No license is required. The WebOffice Video Plug-in software supports third party Web cameras and the ability to receive and view video stream if you do not have a video endpoint.

The WebOffice Video Plug-in software can be downloaded at any time directly from the WebOffice Web site, or the user is offered the option to download the software when joining a WebOffice meeting without a supported Polycom video endpoint.

To download the WebOffice Video Plug-in software from the WebOffice Web site:

1. Enter the address of the WebOffice Web site. The address is provided by your system administrator.

   The WebOffice Lobby page opens.

2. Click Get Help on the toolbar.
The Office Help page opens.

3. Click the Utilities link.

The Utilities Web page opens.

4. Click the Download button next to WebOffice Video Plug-In.
The *Download* page opens.

5. Click the **Download** link to start the download.
6. Click **Save** to save the downloaded file on your computer for installation.
7. When the download is complete, double-click the `.exe` file.
8. Logout of your *WebOffice* and re-login.

**To download the WebOffice Video Plug-in software when joining a WebOffice conference:**

1. Join or start a video conference in *WebOffice*.
2. The system automatically checks to see if the user has a supported video endpoint attached. If not, they are offered to download the *WebOffice* Video Plug-in software. In such a case the following message appears:

3. Click **Yes** to open the *WebOffice* Video Plug-in download web page.
The *Download Software* Web page opens.

4. Click the **Download** link to start the download.
5. Click **Save** to save the downloaded file on your computer for installation.
6. When the download is complete, double-click the `.exe` file.
7. Logout of your WebOffice and re-login.

Since the WebOffice Video Plug-in is a big file (7.5 MB), and since using the Video Plug-in requires you to logout and re-login to your WebOffice, you might prefer not to download the software during the current ongoing conference. Instead, you can wait for the conference to end and use the new capabilities during the next conference.

**Using the WebOffice Video Plug-in**

Once the WebOffice Video Plug-in is installed, WebOffice automatically recognizes it and a Desktop endpoint option is added to your *Selected Endpoints* list.

"**View Only**" Mode

If you select Desktop endpoint from the *Selected Endpoints* list, and WebOffice does not detect a ViaVideo camera or a supported Web camera, you automatically enter "View Only" mode and the **View Only** icon appears in your *Selected Endpoints* area.
Other WebOffice owners will see you as a "View Only" buddy in their buddy lists.

You can now start or join a video conference or a direct video call and receive the video stream of other participants, however other participants will not be able to see you.

**Using a Web Camera or a ViaVideo Endpoint**

To use a Web camera or a ViaVideo endpoint:

- Connect the camera to your computer and select Desktop endpoint in the *Selected Endpoints* list.

  The *Camera* icon appears in the *Selected Endpoints* area.

You can now send and receive video stream when starting or joining a video conference or a direct video call.
If a View Only icon appears instead of the Camera icon, it is possible that WebOffice did not detect your video endpoint. Click ‘Reset desktop camera’ in the Selected Endpoint list to have WebOffice detect your endpoint.
Windows Messenger Integration Mode

WebOffice is available for integration with Microsoft Windows Messenger (Windows Messenger Integration mode), extending Windows Messenger’s capabilities to include Polycom’s multipoint audio and video conferencing. WebOffice works seamlessly with Windows Messenger and users can invite participants and start a multipoint conference directly from their instant messaging session or from their contact’s list, with a click of the mouse.

The Windows Messenger interface completely replaces the WebOffice Manager user interface. The WebOffice Buddy list is replaced by the Windows Messenger Contacts list, and the buddy’s video endpoint type and status are displayed in the Windows Messenger Contacts pane. Conference preferences, the Conference Organizer and conferences are started directly from the Windows Messenger interface.

In Windows Messenger Integration mode you can:
- Initiate WebOffice audio, video and data conferences
- Start the WebOffice Conference Organizer
- Modify the WebOffice properties

As with the standard WebOffice implementation, WebOffice in Windows Integration mode allows users to associate themselves with a variety of personal or group conferencing endpoints - including SIP, H.323, H.320/ISDN and PSTN based endpoints. Users can easily switch between their default associated endpoint (for example a ViaVideo/Web camera) and a room based system (for example a VSX7000/ViewStation).

WebOffice integrates with Microsoft’s Windows Messenger client (version 5.0), in conjunction with the Microsoft Office Live Communications Server 2003 (LCS) enterprise application.

For full details on Microsoft Windows Messenger, refer to the Windows Messenger Help.
Initiating WebOffice Functionalities in Windows Messenger

When WebOffice is in Windows Messenger Integration mode, users can access WebOffice functionalities in a variety of ways:

- By right-clicking a contacts name in the Main window:

- From the Actions menu in the Main window:
• From the **I want to...** pane in the *Conversation* window:
Initiating Audio, Video and Data Conferences

Inviting a user to a new conference from Windows Messenger invokes the WebOffice Meeting with a new conference.

Before starting to use WebOffice in Windows Messenger Integration mode WebOffice users should associate themselves with an endpoint For more details see page 64.

To invite a user to a new WebOffice conference:

1. Click Start Polycom Conference from:
   — The Main window
   — The Conversation window

A conference invitation is sent to the conference invitee in Windows Messenger.

2. A confirmation message and an accept/decline message appears in your Conversation window.
3. The WebOffice Meeting window is launched and as each participant accepts the invitation, they join the conference.

![WebOffice Meeting window](image)

Depending on the conference settings, the participants endpoints are either instructed to dial-in to the conference, or the conference is instructed to dial-out to the endpoint. For more details on the dialing mode selection, see page 78.

**Accepting a Conference Invitation in Windows Messenger**

Participants who are invited to a WebOffice conference, receive a conference invitation in their Windows Messenger Conversation window.

**To accept a conference invitation in Windows Messenger:**
- Click the Accept link in the message or press Alt+T to accept the invitation.

![Windows Messenger Conversation](image)

A confirmation message appears indicating that you have accepted the conference invitation and the WebOffice Meeting window opens. If you are already associated with an endpoint, you are automatically connected to the conference. If you are not associated with an endpoint, you can connect to the conference as a dial-out participant.
Joining a Conference as a Dial-out Participant

After the WebOffice Meeting window opens, the invited conference participant who is not associated with an endpoint (or if the dialing mode was set to dial-out by the conference owner) receives a request for their dialing details.

To accept a dial-out conference invitation:

1. Click Yes to accept the conference invitation.

   ![WebOffice Manager](image)

   If the call invitation is for a video conference, the Select Device Type window opens.

   ![Select device type](image)

   2. Select how you will connect to the conference; with your video endpoint or your telephone.

   3. Click Continue.

      The Endpoint Details dialog box opens.

   ![Endpoint Details](image)
4. In the *Endpoint Details* window, define the following parameters:

*Table 11: Endpoint Details parameters*

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferred Call Type</td>
<td>Select your preferred connection type, IP, ISDN or SIP. (Mandatory)</td>
</tr>
<tr>
<td>H.323 Alias Address/Name</td>
<td>Applicable for IP or SIP calls only. Enter the IP or SIP address or alias of the endpoint. (Mandatory)</td>
</tr>
<tr>
<td>ISDN - Country Code</td>
<td>Applicable for ISDN or PSTN calls only. Enter the country code of the number to be dialed by the conference. (Optional)</td>
</tr>
<tr>
<td>ISDN - Area Code</td>
<td>Applicable for ISDN or PSTN calls only. Enter the area code of the number to be dialed by the conference. (Optional)</td>
</tr>
<tr>
<td>ISDN - Number</td>
<td>Applicable for ISDN or PSTN calls only. Enter the number to be dialed by the conference. (Mandatory)</td>
</tr>
</tbody>
</table>

5. Click **OK** to connect to the conference.
Initiating the Conference Organizer

The Conference Organizer can be launched from Windows Messenger. This provides an alternative way of starting a conference, allowing you to also invite non-Window Messenger based participants. In addition, the participant’s dialing mode can be changed and you can review the conference details in a structured manner.

For more details on the Conference Organizer, see “Conference Organizer” on page 87.

To launch the Conference Organizer from Windows Messenger:
1. Select **Start Polycom Conference Organizer** from:
   - The *Main* window
   - The *Conversation* window
The Conference Organizer window opens.

Microsoft Messenger users who are not WebOffice users do not appear in the Conference Organizer buddy list, however they can be added as a manual participant. Refer to “Conference Organizer” on page 87 for details on adding participants manually.

2. Refer to “Conference Organizer” on page 87 for details on setting up a conference via the Conference Organizer and adding participants manually.
Changing Conference and User Properties

From Windows Messenger, the user can access the Properties dialog box to change their system properties and user preferences. This includes:

- **Profile** - Contains your personal information that is displayed in your WebOffice for other users and visitors to view, and lets you change your WebOffice password.
- **Preferences** - Lets you configure preferences according to your specific requirements, and lets you change the WebOffice language.
- **Security** - Lets you define the security settings to be activated for both conferences and documents.
- **Conference settings** - Lets you set your default conference type, meeting invitation text and whether point-to-point dialing should be activated for two participants.
- **Conference endpoints** - Displays the name and status of your conference endpoints, and allows you to define new endpoint detection settings and to set the dial speed for a video endpoint. You also can select group endpoints from the existing list defined by the Administrator, or add new group endpoints manually.
- **Dialing settings** - Lets you select the default dialing mode for conference participants - dial-in or dial-out. Dial-in participants are instructed to call the conference, and dial-out participants will be called by the conference. Dial-out participants can join all types of multipoint conferences with all endpoint types (both Polycom and non-Polycom endpoints) and will automatically connect to the conference. The conference can include both WebOffice and non-WebOffice users.

For more details on the Properties window, see Chapter 4, System Properties and Preferences in the WebOffice User’s Guide.

To launch the Properties dialog box from Windows Messenger:
1. Select **Start Conference Preferences** from:
   - The **Main** window
   - The **Conversation** window
The WebOffice Properties-Profile dialog box opens.

2. Update the required properties and/or set your preferences. For more details, see Chapter 4, System Properties and Preferences in the WebOffice User’s Guide.

3. Click OK to save the updated properties.

Associating an Endpoint with Windows Messenger

Before starting to use WebOffice in Windows Messenger Integration mode WebOffice users should associate themselves with an endpoint. Users can associate themselves with a variety of personal or group conferencing endpoints - including SIP, H.323, H.320/ISDN and PSTN based endpoints. Users can easily switch between the default associated endpoint, (for example a desktop Web camera) and a room based system (for example a VSX7000). The users’ associated endpoint can be selected from a list that is pre-defined by the Administrator, or the endpoint can be added manually.

WebOffice in Windows Integration mode supports Polycom’s ViaVideo line of personal video products, ViewStation EX/FX, and entire VSX series (3000/5000/7800/8000) of video endpoints, including the v500. When configured with the downloadable WebOffice Video Plug-in, Windows Messenger users can alternatively associate any support Web camera as their WebOffice video endpoint. The WebOffice Video Plug-in also allows users without a camera to participate in video conferences in a view-only mode. For more details, see “WebOffice Video Plug-in” on page 47.
Defining the Server for Windows Messenger Mode

All WebOffices on a WebOffice server use either the Windows Messenger Integration modes interface or the WebOffice Manager’s interface. This is configured by the WebOffice Administrator in the Administrator’s tool.

To work in LCS mode, you should have the appropriate license activated on your server.

To set WebOffice to work with Window’s Messenger in the Administrator’s Tool:

1. On the Main Menu pane, click General Server Settings.

The General Server Settings window opens.

2. Select the Server LCS Mode check box to enable WebOffice integration with Windows Messenger.

3. Click Apply to save the changes.

For more details on the Windows Messenger Plug-In link and downloading the WebOffice Windows Messenger Integration mode software, see “Distributing and Installing the Installation File” on page 68.
Creating Accounts for Window Messenger Users

The WebOffice Administrator has the option of using the Bulk Accounts Generator Tool to create accounts for all users. The Administrator must then provide all users with the WebOffice installation file access.

Using the Bulk Accounts Generator Tool

The Bulk Registration Tool provided in your WebOffice package CD allows you to easily create large amounts of accounts for current Windows Messenger users in your organization.

The Administrator simply exports details of the Windows Messenger users from the Microsoft LCS or the Active Directory using the Bulk Accounts Generator Tool, where accounts are automatically created for everyone.

You can export the details of the Microsoft Messenger user account entries directly to the CSV file. For more details see your Microsoft Messenger LCS or Active Directory Guides.

1. Open the **Bulk Accounts Generator Tool**, included on the WebOffice package CD.

2. Type in the LCS domain name.

3. Click **Lookup Users**.
4. Select the appropriate group, for instance Users.

![Select Active Directory Node](image)

5. Click the **Select** button.

6. Select the users you want to import.
The imported users are displayed, type in WebOffice IP address or URL to create the offices on the server.

WebOffice server must allow offices to be created from the web in order for this tool to work. this option is turned off by default, it can be activated from the web admin interface under **Options**.

**Distributing and Installing the Installation File**

The Administrator must provide access to the installation files to all users. The file can be sent to all users, or the users can be directed to the URL where they can download the file themselves.

**To access the installation files in the Administrator’s Tool:**

1. On the **Main Menu** pane, click **General Server Settings**.

   The **General Server Settings** window opens.

2. If it isn’t already selected, select the **Server LCS Mode** check box to enable WebOffice integration with Windows Messenger.

3. Click the **Windows Messenger Plug-In** link.
The Download Client Software page opens in your Web browser.

4. Either download the installation file and send it to all WebOffice users in your organization, or send the Download Client Software URL page to all users in your organization so they can download the software.

5. After the users receive the installation file, they must logout and completely close Windows Messenger, then run the installation file.

6. During the installation users are asked for the WebOffice server URL - the Administrator must provide the user with the appropriate IP or URL.

When the user logs into Windows Messenger after the installation is complete, WebOffice is fully integrated.

After the installation of WebOffice in Windows Messenger Integration mode, users should access Start Polycom Conference Preferences in Windows Messenger to select their associated video endpoint. For more details, see “Changing Conference and User Properties” on page 63.

For users to work properly with a ViaVideo or Web camera endpoint, or to have view-only video stream, the WebOffice Video Plug-In should be installed. For more details see “WebOffice Video Plug-in” on page 47.
Direct Video Call

Direct Call enables WebOffice users to communicate point-to-point directly with other WebOffice users without having to start a WebOffice conference. In addition, WebOffice users without a video endpoint who have the WebOffice Video Plug-in can receive the video stream from other non-WebOffice users.

The Direct Video Call functionality is seamlessly incorporated in the WebOffice Manager, letting users work from one window and perform all of the required tasks. Using a video endpoint along with the WebOffice Video Plug-in, users can dial directly to other H.323 endpoints and conferences. Users can also receive calls on their video endpoint. Even if the users do not have an endpoint, using the WebOffice Video Plug-In allows them to receive the video stream for viewing.

Placing a Call (Point-to-Point)

You can place calls using your video endpoint in the WebOffice Manager window.

To place a call from your video endpoint:
1. In the WebOffice Manager, click the Direct Video Call arrow.

The Direct Video Call pane opens.
2. Click the **Call** button.

The **Direct Call** dialog box opens.

3. In the **Number** box, enter an IP address (255.255.255.255), DNS name (lobby.austin.polycom.com), or H.323 extension of the video endpoint you want to call. Dialed numbers are stored in the **Number** box history and can then be selected from the drop-down list.

4. In the **Speed** box, select the desired dialing speed. The default dialing speed is 256 Kbps.

5. Click **Dial**.
6. When the video call is established, it is shown in the Direct Video Call pane.

If an Audio only call is established, the Audio only icon is shown in the Direct Video Call pane.

Table 12 details the available camera control icons and their actions for a Direct Video call.

**Table 12: Direct Video Call icons**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Decrease Volume</td>
<td>Click to reduce the volume.</td>
</tr>
<tr>
<td></td>
<td>Increase Volume</td>
<td>Click to increase the volume.</td>
</tr>
<tr>
<td></td>
<td>Decrease Brightness</td>
<td>Click to reduce the brightness of the video image. (Applicable for video calls only.)</td>
</tr>
<tr>
<td></td>
<td>Increase Brightness</td>
<td>Click to increase the brightness of the video image. (Applicable for video calls only.)</td>
</tr>
<tr>
<td></td>
<td>Picture in Picture (PIP)</td>
<td>Click to open a small window showing what the far endpoint (site) sees. (Applicable for video calls only.)</td>
</tr>
<tr>
<td></td>
<td>Mute</td>
<td>Click turn off your microphone. If you are in a call the far site will not hear you.</td>
</tr>
<tr>
<td></td>
<td>UnMute</td>
<td>Click to turn on your microphone if it was turned off.</td>
</tr>
</tbody>
</table>
If the person you have called declines the call, or does not answer the call within a reasonable amount of time, a notification box appears, letting you know that the far endpoint did not answer.

### Ending a Call

**To end a video conference:**
- In the *Direct Video Call* pane, click the **Hang Up** button.

### Answering a Call

Incoming Direct Video calls can be answered in two ways:
- Manually
- Automatically

#### Manually

**To answer a call manually:**
When a call is received by your video endpoint, the *Incoming Call* notification dialog box appears, that includes the date, time and IP address of the call.

1. Click **Yes** to answer the call.
2. When the video call is established, the video image is shown in the *Direct Video Call* pane.
To end a video conference:

- Click the **Hang Up** button in the *Direct Video Call* pane.

**Missed Calls**

When a call is unanswered, a notification box appears on the far endpoint with the missed call details.

**Automatically**

You can set the system to answer incoming video calls automatically.

Automatically answering calls is convenient, however an unexpected caller could interrupt a meeting in progress.

**To set the system to answer all calls automatically:**

1. In the *WebOffice* Manager window, click the **Properties** button.
2. Select the **Conference Settings** tab.
3. Select the **Auto Answer** check box.

When you receive a video call, it is automatically answered and displayed in the *Direct Video Call* pane that opens in the *WebOffice* Manager.
Dial Out

WebOffice owners can select the dialing mode for their conference participants - dial-in or dial-out. Dial-in participants are instructed to call the conference, and dial-out participants will be called by the conference. Dial-out participants can join audio and/or video multipoint conferences with all endpoint types (both Polycom and non-Polycom endpoints) and will automatically connect to the conference. The conference can include both WebOffice and non-WebOffice users.

Invited WebOffice conference participants, who are assigned to fully supported endpoints are identified as such by the WebOffice server, and can connect automatically whether they are instructed to call the conference (dial-in), or are called by the conference (dial-out). All other invited conference participants without assigned endpoints provide their endpoint details to the WebOffice server and are called by the conference (dial-out). This allows for automatic connection to the conference for all invitees, regardless of their endpoint type.

The WebOffice owner can set the default dialing mode for their conferences in the WebOffice Manager - Properties. The default dialing modes can be changed for each individual conference participant from the Conference Organizer's window when setting up the conference. The WebOffice owners’ ability to allow dial-in and dial-out participants is limited by the permissions set by the WebOffice Administrator in the Administrators Tool.

Defining the Default Dialing Settings

The meeting owner can select if meeting participants are dial-in or dial-out. The meeting owners ability to set their dialing settings is limited by the permissions set by the WebOffice Administrator. For more details, see “Dial-Out Permissions” on page 83.

To set the WebOffice dialing settings:

1. In the WebOffice Manager window, click the Properties button.

2. Click the Dialing Settings tab.
The Properties - Dialing Settings window opens.

3. Select the dialing settings, as detailed in Table 13.

Table 13: Properties - Dialing Settings options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Video</td>
<td></td>
</tr>
<tr>
<td>All participants call the conference (dial-in)</td>
<td>Select this option to require all video participants in the Buddy list to call the conference. You can modify the dialing mode from the Conference Organizer.</td>
</tr>
<tr>
<td>Let the system decide who calls (recommended)</td>
<td>Select this option to let the system determine the best way to connect the video participant. When this is selected, Polycom endpoints automatically identified by the system (ViaVideo, ViewStation, VSX family and WebOffice Video Plug-in) are instructed to call (dial-in) the conference. If the endpoint is not recognized, the system will call (dial-out) the endpoint.</td>
</tr>
<tr>
<td>Audio</td>
<td></td>
</tr>
<tr>
<td>All participants call the conference (dial-in)</td>
<td>Select this option to require all audio participants in the Buddy list to call the conference. You can modify the dialing mode from the Conference Organizer.</td>
</tr>
<tr>
<td>The conference calls all participants (dial-out)</td>
<td>Select this option to require the conference to call all audio participants in the Buddy list. You can modify the dialing mode from the Conference Organizer.</td>
</tr>
</tbody>
</table>
**Table 13: Properties - Dialing Settings options**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General</strong></td>
<td>Prompt when an ISDN/PSTN dial-out participant joins the conference without receiving an invitation. Select this check box to receive a message when an ISDN/PSTN dial-out participant joins an on-going conference directly from the Buddy list without receiving an invitation. This information is useful to know as ISDN/PSTN participants incur an additional phone charge when joining the conference as dial-out participants. When a ISDN/PSTN dial-out participant joins the conference without an invitation, the meeting owner receives the following message: Select <strong>Yes</strong> to allow the participant to join the conference or select <strong>No</strong> to deny the participant access to the conference. If the participant is denied access to the conference, they will receive the following message:</td>
</tr>
</tbody>
</table>

[Table 13: Properties - Dialing Settings options](#)
Modifying the Default Dialing Mode from the Conference Organizer

Conferences with dial-in and dial-out participants are started from the WebOffice Manager window. If you want to change the default dialing mode of a participant, you must start the conference from the Conference Organizer.

For more details on the Conference Organizer, see “Conference Organizer” on page 87.

To start a conference and modify the dialing mode from the Conference Organizer window:

1. In the WebOffice Manager, click the Conference arrow and then select Conference Organizer.

   ![Conference Organizer Window]

   The Conference Organizer window opens.

2. Select the required conference type.

3. Select the participants for the conference.
The default dialing mode icon appears next to the participant’s name in the Conference Participants list. Table 14 details the dialing mode icons.

**Table 14: Dialing Mode Connection icons**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Video conference" /> Automatic-dial</td>
<td>The system decides if the participant is dial-in or dial-out for a Video conference.</td>
</tr>
<tr>
<td><img src="image" alt="Auto conference" /> Automatic-dial</td>
<td>The system decides if the participant is dial-in or dial-out for an Audio conference.</td>
</tr>
<tr>
<td><img src="image" alt="Video conference" /> dial-in</td>
<td>The participant dials-in (calls) to the Video conference.</td>
</tr>
<tr>
<td><img src="image" alt="Video conference" /> dial-out</td>
<td>The Video conference dials-out (calls) to the participant.</td>
</tr>
<tr>
<td><img src="image" alt="Audio conference" /> dial-in</td>
<td>The participant dials-in (calls) to the Audio conference.</td>
</tr>
<tr>
<td><img src="image" alt="Audio conference" /> dial-out</td>
<td>The Audio conference dials-out (calls) to the participant.</td>
</tr>
<tr>
<td><img src="image" alt="Ask the participant" /> for details for a Video conference</td>
<td>The conference owner has requested the conference participant’s endpoint information. The participant will be connected to the Video conference according to the details they enter.</td>
</tr>
<tr>
<td><img src="image" alt="Ask the participant" /> for details for an Audio conference</td>
<td>The conference owner has requested the conference participant’s endpoint information. The participant will be connected to the Audio conference according to the details they enter.</td>
</tr>
</tbody>
</table>

4. To change the dialing mode in the Conference participants list, right-click the dialing mode icon next to the participant’s name and then select the desired dialing mode.
The following options are available for selection:

- **Let the system decide who calls** - This is the recommended dialing mode. Select this option to let the system determine the best way to connect the video participant. When this is selected, Polycom endpoints that are automatically identified by the system (ViaVideo, ViewStation, VSX family and WebOffice Video Plug-in) are instructed to call (dial-in) the conference. If the endpoint is not recognized, the system will call (dial-out) the endpoint.

- **The participant calls the conference** - The participant dial in to the conference. Polycom endpoints identified by the system (ViaVideo, ViewStation, VSX family and WebOffice Video Plug-in) are instructed to automatically call (dial-in) to the conference. If the endpoint is not recognized, the participant must call the conference manually using the conference details information provided in the WebOffice Meeting Manager when the conference begins.

- **The conference calls the participant** - The conference dial out to the participant. When this is selected, the participant’s endpoint details must be provided.

5. If you have selected *Conference calls the participant (dial-out)*, select the definition mode of the participant’s dialing details:

   - **Ask participant for details** - A dialog box opens in the participant’s WebOffice Meeting Manager, asking them to select their endpoint type and to enter their dialing details. Even if the participant is using a recognized Polycom endpoint, they will still be asked for their details. Asking the participant to enter their details is a time-saver, eliminating the need for the WebOffice owner to manually add the participant’s details.

   - **Enter participant details** - A dialog box opens, allowing you to enter the participant’s details. This is useful when the WebOffice owner wants to enter specific endpoint details for the participant. This will override any endpoints previously assigned to the participant. After the participant’s details are entered, the participant will need to accept the WebOffice invitation to connect to the conference. If you want the participant to be able to connect to the conference automatically even when they are away from the computer, you must add the...
participant as a Manual participant. For more details see “Conference Organizer” on page 87.

6. If you have selected to enter the Participant details, define the following parameters:

Table 15: Participant Details fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>This field is automatically filled in with the participant's name.</td>
</tr>
<tr>
<td>Preferred Call Type</td>
<td>Select the preferred connection type, IP, ISDN, or SIP. (Mandatory)</td>
</tr>
<tr>
<td>H.323/Sip Address/Name</td>
<td>Applicable for IP and SIP calls only. Enter the IP or SIP address or alias of the endpoint. (Mandatory)</td>
</tr>
<tr>
<td>ISDN/PSTN - Country Code</td>
<td>Applicable for ISDN/PSTN calls only. Enter the country code of the number to be dialed. (Optional)</td>
</tr>
<tr>
<td>ISDN/PSTN - Area Code</td>
<td>Applicable for ISDN calls only. Enter the area code of the number to be dialed by the conference. (Optional)</td>
</tr>
<tr>
<td>ISDN/PSTN - Number</td>
<td>Applicable for ISDN calls only. Enter the number to be dialed by the conference. (Mandatory)</td>
</tr>
<tr>
<td>ISDN/PSTN - Ext.</td>
<td>Applicable for ISDN calls only. Enter the extension, of any, of the number to be dialed. (Optional)</td>
</tr>
<tr>
<td>Phone (audio only)</td>
<td>Select this check box if the endpoint is audio only (phone). (Optional)</td>
</tr>
</tbody>
</table>

7. Click OK.

8. Click Start to start the conference.
Accepting a Dial-out Conference Invitation

If the WebOffice owner selects **The conference calls the participant (dial-out) - Ask the participant for details** in the Conference Organizer, or if the dialing mode is set to dial-out/let the system decide who calls in the WebOffice Manager, the invited conference participant receives a request for their dialing details after they have entered the conference and are in the WebOffice Meeting window.

**To accept a dial-out conference invitation:**

1. Click **Yes** to accept the conference invitation.

   ![WebOffice Manager](image)

   If the call invitation is for a video conference the **Select Device Type** window opens.

   ![Select device type](image)

   2. Select how you will connect to the conference; with your video endpoint or your telephone. If the conference is an audio only conference, skip this step.

   3. Click **Continue**.

   The **Endpoint Details** dialog box opens.

   ![Endpoint Details](image)
4. In the Endpoint Details window, define the following parameters:

<table>
<thead>
<tr>
<th>Field</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferred Call Type</td>
<td>Select your preferred connection type, IP, ISDN or SIP. (Mandatory)</td>
</tr>
<tr>
<td>H.323 Alias Address/Name</td>
<td>Applicable for IP or SIP calls only. Enter the IP or SIP address or alias of the endpoint. (Mandatory)</td>
</tr>
<tr>
<td>ISDN - Country Code</td>
<td>Applicable for ISDN calls only. Enter the country code of the number to be dialed by the conference. (Optional)</td>
</tr>
<tr>
<td>ISDN - Area Code</td>
<td>Applicable for ISDN calls only. Enter the area code of the number to be dialed by the conference. (Optional)</td>
</tr>
<tr>
<td>ISDN - Number</td>
<td>Applicable for ISDN calls only. Enter the number to be dialed by the conference. (Mandatory)</td>
</tr>
</tbody>
</table>

5. Click **OK** to connect your endpoint to the conference.

**Dial-Out Permissions**

The WebOffice Administrator defines the permissions for the WebOffice owners to run multipoint audio and video conferences, and to invite IP, ISDN and PSTN dial-out audio participants.

Permissions can be set at two levels; for all WebOffices defined on the server, and for each WebOffice individually.

**To set the general permissions for all WebOffice servers:**
1. In the WebOffice Administrator’s main menu, select **Video/Audio Parameters**.
   
   The Audio/Video Common Parameters window opens.

   The WebOffice server must be set to **MCU Direct Management** mode. Dial-Out is not available in WebCommander mode.
2. Select the parameters, as detailed in Table 17.

Table 17: Dial-Out Permissions for all WebOffices

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow initiating Multipoint Audio conferences</td>
<td>Select this check box to allow the WebOffice owner to initiate multipoint audio conferences.</td>
</tr>
<tr>
<td>Allow initiating Multipoint Video conferences</td>
<td>Select this check box to allow the WebOffice owner to initiate multipoint video conferences.</td>
</tr>
<tr>
<td>Allow inviting IP dial-out participants</td>
<td>Select this check box to allow the WebOffice owner to invite IP dial-out participants to their conferences.</td>
</tr>
<tr>
<td>Allow inviting ISDN dial-out video participants</td>
<td>Select this check box to allow the WebOffice owner to invite ISDN dial-out participants to their conferences. Note: ISDN dial-out participants included in a WebOffice conference may incur additional phone charges.</td>
</tr>
<tr>
<td>Allow inviting PSTN dial-out audio participants</td>
<td>Select this check box to allow the WebOffice owner to invite PSTN dial-out participants to their conferences. Note: PSTN dial-out participants included in a WebOffice conference may incur additional phone charges.</td>
</tr>
</tbody>
</table>

3. Click Submit to apply the changes to the WebOffices.

To set the permissions for a new WebOffice:

1. In the Add A WebOffice window, select the parameters, as detailed in Table 17 on page 84.

If a permission is not given in the Audio/Video Common Parameter window, the permission appears disabled in the Add A WebOffice window.

2. Click Submit to save the settings.
To set or update the Dial-Out permissions for an existing WebOffice:
1. In the WebOffice Administrator’s Tool, select Search WebOffices on the left-hand pane.
   
   The Search a WebOffice window opens.

2. Click the more link of the WebOffice where you want to set or update the Dial-Out permissions.
   
   The Search a WebOffice page opens.

3. Select the parameters, as detailed in Table 17 on page 84.

4. Click Apply to save the settings.

   If a permission is not given in the Audio/Video Common Parameter window, the permission appears disabled in the Search A WebOffice window.
Selecting the Call Type: IP or ISDN

In version 7.0.1 WebOffice users attached to a group endpoint can select their preferred call type for the conference endpoint: IP (H.323) or ISDN (H.320).

The default connection value of the endpoint is defined in the WebOffice server by the Administrator when defining the endpoint, or by the WebOffice owner when manually added the endpoint.

If a WebOffice owner selects ISDN for an attached endpoint and the endpoint only supports IP, a message box appears notifying the owner and the connection mode does not change.

If a WebOffice owner selects ISDN for an attached endpoint and the endpoint is not properly configured for ISDN, a message box appears notifying the owner that the call might not succeed, and to contact their Administrator.
Conference Organizer

The Conference Organizer enables you to select the participants dialing mode, dial-in or dial-out. Participant’s connection dialing mode can be changed and you can review the conference details in a structured manner from one window.

Launching the Conference Organizer Window

To launch the Conference Organizer:
- In the WebOffice Manager, click the Conference arrow and then select Conference Organizer.

The Conference Organizer window opens.
The Conference Organizer window is divided into six general areas:

- **Conference type** – The conference type is selected: Audio Conference, Video Conference or a combination of Audio or Video with Data Collaboration.

- **Participants list** – This list is an exact copy of your buddy list.

- **Manual participants** – Allows you to manually add participants to the conference. Participants added manually will connect to the conference as audio/video participants and will not have direct access to data or the WebOffice conference. You can however, instruct these participants to go to your WebOffice homepage, from where they can join the WebOffice conference as a guest, and then be able to view data in the WebOffice Meeting Manager.

- **Conference participants** – This list displays the participants (buddies or manual participants) who have been selected to join the conference, and their conference connection mode.

- **Add/Remove participants** – Contains two command buttons that are used to add or remove conference participants:
  - **Add** – Adds selected participants in Participant list area (left pane) to the Conference Participants list area (right pane).
  - **Remove** – Removes selected participants from the Conference Participants list area (right pane). When a manually added participant is removed, you will have to define that participant again if you decide to add him/her at a later time.

- **Start/Cancel conference** – Contains command buttons that enable you to start the conference immediately or to cancel the selections.

### Starting a New Conference from the Conference Organizer

To start a conference from the Conference Organizer window:

1. Select the required conference type.

2. Select the participants for the conference:
   - In the Participants list, click the participant name(s) and then click Add>>.
   - The selected participants appear in the Conference Participants list.

3. You can manually add participants who are not on your buddy list.
a. In the Add Participant Manually dialog box, enter the participant name and then click Add >.

The Participant Details dialog box opens.
b. Define the following parameters:

**Table 18: Participant Details fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Type the name of the participant as it will be displayed during the conference in the Participants list.</td>
</tr>
<tr>
<td>Call Type</td>
<td>Select the preferred network connection type, IP or ISDN.</td>
</tr>
<tr>
<td>H.323/Sip Address/Name</td>
<td>Applicable for IP and SIP calls only. Enter the IP or SIP address or alias of the endpoint.</td>
</tr>
<tr>
<td>ISDN/PSTN - Country Code</td>
<td>Applicable for ISDN/PSTN calls only. Enter the country code of the number to be dialed.</td>
</tr>
<tr>
<td>ISDN - Area Code</td>
<td>Applicable for ISDN/PSTN calls only. Enter the area code of the number to be dialed. (Optional)</td>
</tr>
<tr>
<td>ISDN - Number</td>
<td>Applicable for ISDN/PSTN calls only. Enter the number to be dialed. (Mandatory)</td>
</tr>
<tr>
<td>ISDN - Ext.</td>
<td>Applicable for ISDN/PSTN calls only. Enter the extension, if any, of the number to be dialed. (Optional)</td>
</tr>
<tr>
<td>Phone (audio only)</td>
<td>Select this check box if the conference participant will join the conference by phone. When the conference is Audio only, this check box is automatically selected and disabled. (Optional)</td>
</tr>
</tbody>
</table>

c. Click OK to add the participant to the Conference Participants list.
d. Repeat steps a to c to add additional participants manually.

4. Click the Start button.

**Defining the Dialing Mode from the Conference Organizer**

The dialing mode can be selected in the Conference Organizer. The selection is performed by right-clicking the participant’s name in the Participants list. The dialing modes are:

- Dial-in
- Dial-out
  - The owner defines the participant’s connection details
  - The guest defines the connection details

The dialing mode options are:

- **Let the system decide who calls** - This is the default and the recommended dialing mode. The system determines if the participant calls the conference (dial-in) or the conference calls the participant (dial-out).
- **The participant calls the conference** - The participant dials in to the conference.
- **The conference calls the participant** - The conference dials out to the participant. If the WebOffice conference organizer does not know the participant’s dial-out details, he/she can request this information.
The following table details the dialing mode connections and icons:

**Table 19: Dialing Mode Connection icons**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Dialing Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Video conference Automatic-dial" /></td>
<td>Video conference Automatic-dial</td>
<td>The system decides if the participant is dial-in or dial-out for a Video conference.</td>
</tr>
<tr>
<td><img src="image" alt="Auto conference Automatic-dial" /></td>
<td>Auto conference Automatic-dial</td>
<td>The system decides if the participant is dial-in or dial-out for an Audio conference.</td>
</tr>
<tr>
<td><img src="image" alt="Video conference dial-in" /></td>
<td>Video conference dial-in</td>
<td>The participant dials-in (calls) to the Video conference.</td>
</tr>
<tr>
<td><img src="image" alt="Video conference dial-out" /></td>
<td>Video conference dial-out</td>
<td>The Video conference dials-out (calls) to the participant.</td>
</tr>
<tr>
<td><img src="image" alt="Audio conference dial-in" /></td>
<td>Audio conference dial-in</td>
<td>The participant dials-in (calls) to the Audio conference.</td>
</tr>
<tr>
<td><img src="image" alt="Audio conference dial-out" /></td>
<td>Audio conference dial-out</td>
<td>The Audio conference dials-out (calls) to the participant.</td>
</tr>
<tr>
<td><img src="image" alt="Ask the participant for details for a Video conference" /></td>
<td>Ask the participant for details for a Video conference</td>
<td>The conference owner has requested the conference participant's endpoint information. The participant will be connected to the Video conference according to the specified details.</td>
</tr>
<tr>
<td><img src="image" alt="Ask the participant for details for an Audio conference" /></td>
<td>Ask the participant for details for an Audio conference</td>
<td>The conference owner has requested the conference participant's endpoint information. The participant will be connected to the Audio conference according to the specified details.</td>
</tr>
</tbody>
</table>

The default dialing mode is selected in the WebOffice Manager, in the Properties dialog box - Dialing Settings tab.
To change the dialing mode:

1. In the Conference Participants list, right-click the participant’s name and then select the dialing mode.

2. If you have selected Conference calls the participant (dial-out), select the definition mode of the participant’s dialing details.

3. Select the definition mode for the participant number:
   a. Ask participant for details - a dialog box opens on the participant’s desktop, asking them to enter their dialing details.
b. **Enter participant details** - a dialog box opens, allowing you to enter the participant’s details.

![Participant Details Dialog Box](image)

4. Fill in the fields as detailed in Table 15 on page 81.
5. Click **OK**.
## Version 7.0.1 System Limitations

Table 20: Version 7.0.1 Known Limitations

<table>
<thead>
<tr>
<th>#</th>
<th>Topic</th>
<th>Description</th>
<th>Workaround/Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>3524</td>
<td>IVR service port</td>
<td>The IVR Service is on a port other than 5001.</td>
<td>Use only port 5001.</td>
</tr>
<tr>
<td>4197</td>
<td>German language</td>
<td>When a WebOffice name was created with German ‘ue’ it cannot be accessed. The user is routed to the WebOffice Lobby.</td>
<td>WebOffice names must consist of English characters only.</td>
</tr>
<tr>
<td>4327</td>
<td>Audio conference</td>
<td>When a WebOffice owner without an endpoint starts an audio conference and uses a PSTN number with an extension, the extension number is not dialed during dial out.</td>
<td>The MGC Manager supports extensions for dial-out only when working with an IVR-enabled conference.</td>
</tr>
<tr>
<td>4721</td>
<td>WebOffice language selection</td>
<td>WebOffice does not support more than one active language at a given time. Users cannot open several browsers with different languages.</td>
<td>Use one active language at a time.</td>
</tr>
<tr>
<td>3670</td>
<td>ViewStation</td>
<td>In a multipoint conference when using a ViewStation endpoint, the user has no control over the ViewStation.</td>
<td>You can regain control only after pressing NEAR on the remote control.</td>
</tr>
<tr>
<td>2895</td>
<td>Video endpoints</td>
<td>It is impossible to change the IP address, Access number and Password to manually added endpoints.</td>
<td></td>
</tr>
<tr>
<td>3667</td>
<td>WebOffice Manager Visitor list</td>
<td>The WebOffice owner cannot see guests that use Linux or Mac platforms in the WebOffice Manager Visitors’ list.</td>
<td></td>
</tr>
<tr>
<td>3633</td>
<td>Multi-Company mode</td>
<td>In Multi-Company mode, users can see the offices of the default company site even if they belong to another company.</td>
<td>Do not have offices under the default company site when running a multipoint conference.</td>
</tr>
<tr>
<td>2989</td>
<td>WebOffice Meeting window</td>
<td>When the resolution is set to 800*600 the WebOffice Meeting panes are unclear.</td>
<td>Use a higher resolution.</td>
</tr>
</tbody>
</table>
### Table 20: Version 7.0.1 Known Limitations

<table>
<thead>
<tr>
<th>#</th>
<th>Topic</th>
<th>Description</th>
<th>Workaround/Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>3056</td>
<td>Administrator Endpoint Configuration</td>
<td>If the Administrator changes the endpoint configurations and the endpoint is listed in a users Endpoint List in the WebOffice Manager, the configurations will not appear updated until the user removes the endpoint and adds it again.</td>
<td>The Administrator can remove the endpoint and add it again to the attached offices, or an email can be sent, notifying the Web Office owners to remove the endpoint and add it again.</td>
</tr>
<tr>
<td>3094</td>
<td>XAP Service</td>
<td>When restarting the MCU, XAP might cease to function or be out of synchronization - making conferences inaccessible.</td>
<td>Restart the XAP service.</td>
</tr>
<tr>
<td>2213</td>
<td>Video Conference Info window</td>
<td>The Video Conference Info window appears damaged if the A/V conference name Prefix contains more than 5 characters.</td>
<td>Use a shorter conference name Prefix.</td>
</tr>
<tr>
<td>2139</td>
<td>File with .jpeg extension</td>
<td>You cannot upload .jpeg files with the 'jpeg' extension.</td>
<td>Rename the file extension from 'jpeg' to 'jpg', or print to the WebOffice publisher from your .jpeg associated application.</td>
</tr>
<tr>
<td>2431</td>
<td>Administrator changes</td>
<td>After setting 'pending' to other values and pressing the 'submit' button, you cannot cancel the last pending value you made.</td>
<td>Exit the Administrator page and re-login to set the desired value.</td>
</tr>
<tr>
<td>2400</td>
<td>JVM - Java Virtual Machine Support</td>
<td>When WebOffice detects that the user does not have JVM installed on his/her machine, WebOffice notifies the user via a browser test. WebOffice cannot run on a browser that does not have JVM installed.</td>
<td>Install the JVM manually. If you cannot do this, install SUN JRE. This can be downloaded free from <a href="http://java.sun.com/j2se/1.4.1/download.html">http://java.sun.com/j2se/1.4.1/download.html</a>.</td>
</tr>
<tr>
<td>5750</td>
<td>MGC communication</td>
<td>When WebOffice server is located in the DMZ and MGC in MZ a disconnection might occur.</td>
<td>See Note below the table.</td>
</tr>
<tr>
<td>5734</td>
<td>Windows Messenger - Multi Lingual</td>
<td>WebOffice menu's are in different language - updated only in the second sign in.</td>
<td>Sign-out from Windows Messenger and sign-in again.</td>
</tr>
<tr>
<td>5523</td>
<td>Windows Messenger - Account Generator</td>
<td>No appropriate error message when registration key is missing.</td>
<td>Enter registration key.</td>
</tr>
<tr>
<td>5488</td>
<td>Windows Messenger</td>
<td>Can't exit from Windows Messenger if I'm sighed-out.</td>
<td>Sign-in to Windows Messenger and then Exit.</td>
</tr>
<tr>
<td>5487</td>
<td>WebOffice Manager</td>
<td>No uninstall shortcut in the start menu when moving from Windows Messenger to regular Client (Guest side).</td>
<td>Uninstall by Add / Remove program.</td>
</tr>
</tbody>
</table>
Note:

There is a work around that emulate the way WO7 communicate with MGC7:

Install the XAP server on a machine on the same subnet as the problematic MCUs. The
machine must not have WebOffice installation on it. (You can find the installation in
xap.zip - request Polycom support for that). When prompted choose Polycom MGC Web
server and not IIS.

Stop the XAPHttPsrv service. Copy the attached XAP.dll to c:\program files\XAP KIT\xap
(it's a newer version). Start the service again.

Configure the WebOffice to call this computer.
In c:\polycom\conf find the WebOfficeAdministrator.xml.
In this file find the xml tag property which key is called "server.mcu.xapServer.ip" The xml
should look this way:

```xml
<property>
    <key>server.mcu.xapServer.ip</key>
    <value>127.0.0.1:5005</value>
    <access>EDIT</access>
    <isMandatory>true</isMandatory>
    <needsRestart>true</needsRestart>
    <fieldType>text</fieldType>
    <lableText>ip</lableText>
</property>
```

Change the 127.0.0.1 to the ip address of the computer you installed the XAP on. The
property should look the following way now:

```xml
<property>
    <key>server.mcu.xapServer.ip</key>
    <value>172.x.x.x:5005</value> <!-- the ip of the computer with the XAP
    <access>EDIT</access>
    <isMandatory>true</isMandatory>
    <needsRestart>true</needsRestart>
    <fieldType>text</fieldType>
    <lableText>ip</lableText>
</property>
```

---

**Table 20: Version 7.0.1 Known Limitations**

<table>
<thead>
<tr>
<th>#</th>
<th>Topic</th>
<th>Description</th>
<th>Workaround/Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>5118</td>
<td>WebOffice Manager - Direct Call</td>
<td>Impossible to control the PVX volume - PVX version 6.0.</td>
<td>Fixed in PVX version 6.2.</td>
</tr>
<tr>
<td>5048</td>
<td>WebOffice Meeting</td>
<td>Impossible to open files when downgrade from version 7 to 6.</td>
<td>Uninstall WebOffice client and re-login.</td>
</tr>
<tr>
<td>4917</td>
<td>Windows Messenger - Conference Organizer</td>
<td>Selected contacts are not selected when choosing conference organizer.</td>
<td>Select the contacts again when conference organizer is open.</td>
</tr>
</tbody>
</table>
Restart the WebOffice server.