



Cisco IP SoftPhone 1.2

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1 Getting Started with Cisco IP SoftPhone

This guide is intended as a quick reference to get you started using Cisco IP SoftPhone. For detailed information about installing and using your Cisco IP SoftPhone, refer to the *Cisco IP SoftPhone User Guide*. To view the user guide online, go to **Start > Programs > Cisco IP SoftPhone > User Guide**. This information is also available through the online help. To access the online help, click the **HELP** icon in the Cisco IP SoftPhone main dialing window, or the **Help** button in any dialog box.

Obtaining Documentation

The following sections provide sources for obtaining documentation from Cisco Systems.

World Wide Web

You can access the most current Cisco documentation on the World Wide Web at the following sites:

- <http://www.cisco.com>
- <http://www-china.cisco.com>
- <http://www-europe.cisco.com>

Documentation CD-ROM

Cisco documentation and additional literature are available in a CD-ROM package, which ships with your product. The Documentation CD-ROM is updated monthly and may be more current than printed documentation. The CD-ROM package is available as a single unit or as an annual subscription.

Ordering Documentation

Cisco documentation is available in the following ways:

- Registered Cisco Direct Customers can order Cisco Product documentation from the Networking Products Marketplace:
http://www.cisco.com/cgi-bin/order/order_root.pl
- Registered Cisco.com users can order the Documentation CD-ROM through the online Subscription Store:
<http://www.cisco.com/go/subscription>



Nonregistered Cisco.com users can order documentation through a local account representative by calling Cisco corporate headquarters (California, USA) at 408 526-7208 or, in North America, by calling 800 553-NETS(6387).

2 Installation

Depending on how your system administrator has set up Cisco IP SoftPhone on your network, you can install the Cisco IP SoftPhone using one of the following procedures:

- Installing from a Web Page, page 3
- Installing from a Self-extracting Executable, page 4
- Installing from a CD-ROM, page 6

Installing from a Web Page

Use this procedure to install Cisco IP SoftPhone from an intranet web page.



Note You can only use this procedure if your Cisco IP SoftPhone administrator has created a “one-click install” on your web server.

Before You Begin

- Install Microsoft Internet Explorer 4.01 or later.
- You can download this browser from the Microsoft web site at <http://www.microsoft.com/windows/ie/>
- Obtain the following information from your network or system administrator:
 - The URL for the Cisco IP SoftPhone installation files
 - The username and password configured for you on the Cisco CallManager

Procedure

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- Step 1** Open a web browser and go to the URL where the Cisco IP SoftPhone installation files reside.
 - Step 2** Choose the language in which you want to view Cisco IP SoftPhone.
 - Step 3** If you are using Netscape Communicator, click **Grant** in the Java Security window.
 - Step 4** Click the **Install Now** button.
 - Step 5** Read the software authenticity verification and click **Next** to begin the installation.

Step 6 If you are installing Cisco IP SoftPhone for the first time:

- a. Click **Next** in the Welcome screen to begin the installation.
- b. Read the software license agreement and then click **Yes** to accept the terms of the agreement.
- c. Choose a destination to which you want to install Cisco IP SoftPhone and then click **Next**.

If are upgrading to a newer version of Cisco IP SoftPhone, choose **Upgrade to a Newer Version** and click **Next** in the Welcome screen.

Step 7 In the Local TSP Configuration screen, enter your username and password and then click **Next**.



Note The username and password you configure for Cisco IP SoftPhone must be exactly the same as the username and password assigned to you on the Cisco CallManager.

Step 8 If you are installing Cisco IP SoftPhone for the first time, select a Program Folder to which you want the Installer to add icons.

By default, the Installer adds icons to a folder called Cisco IP SoftPhone.

Step 9 Click **Next** and follow the instructions on the screen.

Step 10 In the Install Wizard Complete dialog window, choose whether you want to restart your computer now or later, and click **Finish** to complete the installation.

You must restart your computer before you can begin using Cisco IP SoftPhone.

Installing from a Self-extracting Executable

Use this procedure to install Cisco IP SoftPhone from a self-extracting executable. This installation procedure allows you to download Cisco IP SoftPhone to your local drive and install the program at a later time.

Before You Begin

- Install Microsoft Internet Explorer 4.01 or later.

You can download this browser from the Microsoft web site at <http://www.microsoft.com/windows/ie/>



- Obtain the following information from your network or system administrator:
 - The URL for the Cisco IP SoftPhone installation files
 - The username and password configured for you on the Cisco CallManager

Procedure

Step 1 Open a web browser and go to the URL where the Cisco IP SoftPhone installation files reside.

Step 2 Click the language in which you wish to install Cisco IP SoftPhone.

Step 3 If you are using Netscape Communicator, click **Grant** in the Java Security window.

Step 4 Click **download the Cisco IP SoftPhone installation**.

The Cisco IP SoftPhone download instructions window appears with the URL where the Cisco IP SoftPhone customization files reside.

Step 5 Make a note of the URL which you will need to provide in step 13.

Step 6 Click **Cisco IP SoftPhone** to download the self-extracting executable.

Step 7 In the File download window, choose either to **Run this program from its current location** or **Save this program to disk** and then click **OK**.

If you select **Run this program from its current location**, skip to Step 10.

Step 8 Choose a destination to which you want to download the installation files and click **Save**.

Step 9 In the Download complete window, choose one of the following procedures:

- Click **Open** to launch **CiscoIPSoftPhoneSetup.exe** and begin the installation.
- Click **Open Folder** and launch **CiscoIPSoftPhoneSetup.exe** from the folder.
- Click **Close** to launch **CiscoIPSoftPhoneSetup.exe** at a later time.

Step 10 Choose the language in which you would like the installation screens to appear and click **OK**.

Step 11 Choose the destination to which you want to download the installation files and click **Save**.

Step 12 If you are installing Cisco IP SoftPhone for the first time:

- a. Click **Next** in the Welcome screen to begin the installation.
- b. Read the software license agreement and then click **Yes** to accept the terms of the agreement.
- c. Choose a destination to which you want to install Cisco IP SoftPhone and then click **Next**.

If you are upgrading to a new version of Cisco IP SoftPhone, choose **Upgrade to a Newer Version** and click **Next** in the Welcome screen.

Step 13 In the Setup window, specify the URL where the customization files reside.



Caution If you do not specify the correct URL, you will not receive customization files such as Microsoft NetMeeting 3.01, Cisco TSP and Cisco IP SoftPhone settings. You need these files to run Cisco IP SoftPhone.

Step 14 In the Local TSP Configuration screen, enter your username and password.



Note The username and password you configure for Cisco IP SoftPhone must be exactly the same as the username and password assigned to you on the Cisco CallManager.

Step 15 Click **Next**

Step 16 If you are installing Cisco IP SoftPhone for the first time, select a Program Folder to which you want the Installer to add icons.

By default, the Installer adds icons to a folder called Cisco IP SoftPhone.

Step 17 Follow the instructions on the screen.

Step 18 In the Install Wizard Complete dialog window, choose whether you want to restart your computer now or later, and click **Finish** to complete the installation.

You must restart your computer before you can begin using Cisco IP SoftPhone.

Installing from a CD-ROM

Use this procedure to install Cisco IP SoftPhone from a CD-ROM.

Before You Begin

- Install Microsoft Internet Explorer 4.01 or later.
You can download this browser from the Microsoft web site at <http://www.microsoft.com/windows/ie/>
- Obtain the following information from your network or system administrator:
 - The username and password configured for you on the Cisco CallManager.
 - The location of the customization files (if any) for the Cisco IP SoftPhone installation.
 - Whether your Cisco IP SoftPhone is configured with Cisco CallManager 3.1(x) or Cisco CallManager 3.0(x).

For Cisco CallManager 3.1(x):

- The primary and backup CTI IP Manager addresses of the Cisco CallManager server you will be using.



- Whether Cisco E911 service is configured on the Cisco CallManager.
- If Cisco E911 is configured, the primary and backup server URLs for Cisco IP SoftPhone.

For Cisco CallManager 3.0(x):

- The IP address of the Cisco CallManager server you will be using.

Procedure

-
- Step 1** Insert the installation CD-ROM and run **Launch.exe** to start the Cisco IP SoftPhone installation.
- Step 2** In the Demonstration Language window, select the language in which you want to view the installation windows and click **OK**.
- Step 3** Click **Install Products**.
- Step 4** Click the **Cisco IP SoftPhone** button.
- Step 5** Choose the language in which you want to install Cisco IP SoftPhone from the drop-down menu and click **OK**.
- The InstallShield wizard will launch and prepare for the installation.
- Step 6** Click **Next** in the welcome screen to begin the installation.
- Step 7** Read the software license agreement and then click **Yes** to accept the terms of the agreement.
- Step 8** Choose a destination to which you want to install Cisco IP SoftPhone and then click **Next**.
By default, the installation program installs Cisco IP SoftPhone in the following directory:
C:\...\Cisco Systems\Cisco IP SoftPhone
- Step 9** If you are using customization files:
- Enter the URL where the customization files reside and click **Next**.
- If you are not using customization files:
- Leave the URL field blank and click **Next**. A question box asking whether you want to specify a different directory for the customization files will display.
 - Click **No**.
- Step 10** If E911 service is configured on the Cisco CallManager:
- Click **Yes** in the question box shown in Figure 1.
 - Enter the primary and backup E911 server URLs and click **Next**.
- If E911 service is not configured on the Cisco CallManager:

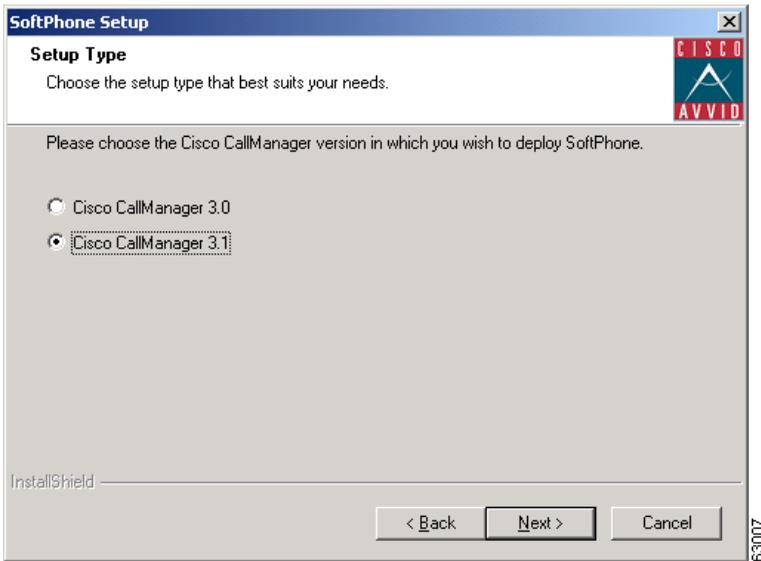
- Click **No**.

Figure 1 *Configuring Cisco IP SoftPhone for E911*



Step 11 In the screen shown in Figure 2, choose the Cisco CallManager version you are using and click **Next**.

Figure 2 *Choosing the Cisco CallManager Version*



Step 12 Use one of the following procedures to configure the Local TSP:

For Cisco CallManager 3.1(x):

- Enter your username and password in the Local TSP Configuration screen.



Note The username and password you configure for Cisco IP SoftPhone must be exactly the same as the username and password assigned to you on the Cisco CallManager.

- b. If you are not using customization files, enter the primary and backup CTI Manager IP addresses for the Cisco CallManager.

For Cisco CallManager 3.0(x):

- a. Enter your username and password in the Local TSP Configuration screen.



Note The username and password you configure for Cisco IP SoftPhone must be exactly the same as the username and password assigned to you on the Cisco CallManager.

- b. If you are not using customization files, enter the IP address for the Cisco CallManager.

Step 13 Click **Next**.

Step 14 Select a Program folder to which you want the Installer to add icons.

By default, the Installer adds icons to a folder called Cisco IP SoftPhone.

Step 15 Follow the instructions on the screen.

Step 16 In the Install Wizard Complete dialog window, choose whether you want to restart your computer now or later, and click **Finish** to complete the installation.

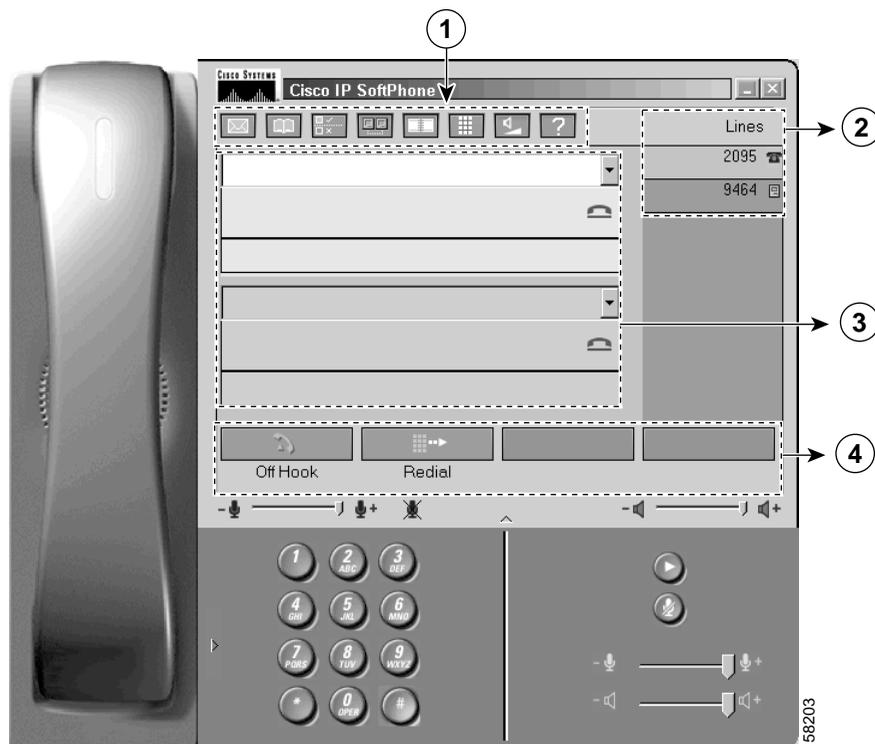
You must restart your computer before you can begin using Cisco IP SoftPhone.

3 Using Cisco IP SoftPhone

Cisco IP SoftPhone turns your computer into a full-feature IP telephone, performing all the functions of a traditional telephone with the added advantages of call tracking, desktop collaboration, and one-click dialing from online directories. You can also use Cisco IP SoftPhone in tandem with a Cisco IP Phone to place, receive and control calls from your desktop PC. Both devices reflect the same current call state.

Figure 3 shows the key components of the main dialing window.

Figure 3 Main Dialing Window



| | | | | | | | |
|---|----------|---|-------|---|-------------|---|------------------------------|
| 1 | Icon bar | 2 | Lines | 3 | Call blocks | 4 | Context-sensitive button bar |
|---|----------|---|-------|---|-------------|---|------------------------------|



Starting Cisco IP SoftPhone

Procedure

Step 1 From the Windows Start menu, choose **Programs > Cisco IP SoftPhone > Cisco IP SoftPhone**.

The first time you start Cisco IP SoftPhone, the Microsoft NetMeeting configuration program will display followed by the Cisco IP SoftPhone Line Selection window. On subsequent sessions, the main dialing window will open.

Step 2 In the NetMeeting configuration window, follow the instructions on the screen to tune audio parameters and specify user information for your system.

You will not see this window if you have previously configured Microsoft NetMeeting.



Caution The collaboration features of Cisco IP SoftPhone will not work unless you configure settings for NetMeeting.

Step 3 In the line selection window, click on the line(s) you want to control and click **OK**.

If there are no lines displayed in the line selection window, see the troubleshooting procedures in the online help and the *Cisco IP SoftPhone User Guide*.

Exiting Cisco IP SoftPhone

To exit Cisco IP SoftPhone, use one of the following procedures:

- Click your right mouse button and select **Exit** from the floating menu.
- Click the **x** in the upper right corner of the main dialing window.
- Press the ALT-F4 on your keyboard.

Selecting Lines to Control

Use this procedure to select the lines your system administrator has assigned to you on the Cisco CallManager.

Procedure

Step 1 Click the **Settings** toolbar icon.



This opens the Settings dialog window.

Step 2 Click the **Advanced** tab.

Step 3 Click **Select Lines...** on the Advanced tab.

This opens the SoftPhone Line Selection window.

Step 4 Select the line(s) you want to control and click **OK**.



Note If there are no lines displayed in the line selection window, see the troubleshooting procedures in the online help and the *Cisco IP SoftPhone User Guide*.

Step 5 Click **OK** to close the Settings dialog window.

When the lines connect, the main dialing window appears.

Selecting Your Cisco IP Phone Line

If you have multiple lines configured for you on the Cisco CallManager, you may see two types of entries in the line selection window:

- An entry with the device name and extension assigned to your Cisco IP Phone or Cisco IP SoftPhone. For example:

```
Cisco Line: [CTIPJChamber][52222]
```

- An entry with the Media Access Control (MAC) address and extension assigned to your Cisco IP Phone. For example:

```
Cisco Line: [SEP003049C2B80F][52222]
```

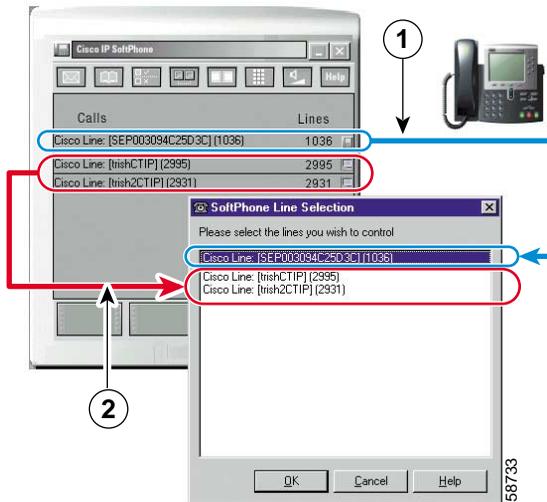
Figure 4 illustrates these two types of entries.

To use Cisco IP SoftPhone as a stand-alone phone, select the entry that contains the device name assigned to your Cisco IP Phone or Cisco IP SoftPhone.



To use Cisco IP SoftPhone in tandem with your Cisco IP Phone, select the entry that contains the MAC address for your Cisco IP Phone.

Figure 4 Selecting Lines to Control



| | |
|---|--|
| 1 | Select this line to use Cisco IP SoftPhone to control your Cisco IP Phone. |
| 2 | Select these lines to use Cisco IP SoftPhone as a stand-alone phone. |

Placing a Call

Procedure

- Step 1** In the main dialing window, click the line button for the line you want to use.
- Step 2** Dial the number you want to call in one of the following ways:
 - Use your keyboard to type the number in the destination box and press **Enter**.
 - Enter the e-mail address or name (partial or full) for the person you want to call and press CTRL-K.

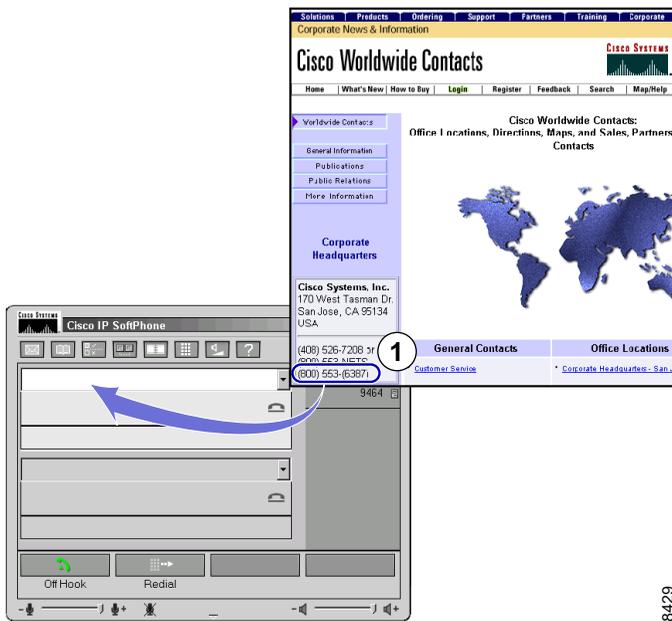


Note To use this feature, you must have a directory entry for the recipient that includes an e-mail address and phone number.

- Use your mouse to click the keys on the online keypad and click **Dial**.
- Drag the number from your Internet browser into the destination box. See Figure 5.
- Open a Cisco IP SoftPhone directory, click your mouse on the name of the person you want to dial and click **Dial** or drag the dialing directory number to the dialing box.
- Click on the arrow next to the dialing box, select the number from the list of recently dialed numbers, and click **Dial**.
- Copy the number from any Windows program, paste it into the destination box, and click **Dial**.

When the call connects, the context-sensitive button bar displays buttons that enable you to perform additional call functions.

Figure 5 *Placing a Call from an Internet Browser*



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1 To place a call from your internet browser, highlight and drag a phone number from your browser into the dialing box.



Ending a Call

To disconnect a call, click the **End Call** button, or press ESC on your computer keyboard.

If you are using Cisco IP SoftPhone with a Cisco IP Phone, you can also end a call by putting the phone on-hook.

Answering a Call

Click the **Answer** button to answer an incoming call.

Additionally, if you are using Cisco IP SoftPhone with a Cisco IP Phone, you can answer an incoming call simply by picking up the handset or by using any answering method supported by the physical phone.

Placing a Call on Hold

To place an active call on hold, click the **Hold** button in the context-sensitive button bar or the **Hold** button on the Cisco IP Phone.

While the call is on hold, caller information, and the time on hold will be displayed in the call block.

To retrieve a call on hold, press the **Resume** button in the context-sensitive button bar, or the **Resume** key on the Cisco IP Phone.

Transferring a Call

Call transfer allows you to send an existing call to another internal or external extension. With Cisco IP SoftPhone, you can perform a consult transfer or a direct transfer.

Performing a Consult Transfer

In a consult transfer, also called an attended transfer, you place a consultation call to the intended recipient before you transfer the call.

Procedure

Step 1 During an active call, click the **Transfer** button in the context-sensitive button bar or the **Transfer** key on the Cisco IP Phone.

- Step 2** In the dialing box, enter the new destination.
- Step 3** Press **Consult** and announce the call to the new destination.
- Step 4** Press **Send Call**.

When the transfer is complete, both the original and the consultation call are removed from your screen.

Performing a Direct Transfer

In a direct transfer, also called an unattended transfer, you immediately transfer the original call to the destination without a consultation call.

Procedure

- Step 1** During an active call, click the **Transfer** button in the context-sensitive button bar, or the **Transfer** key on the Cisco IP Phone.
 - Step 2** In the transfer destination box, enter the new destination.
 - Step 3** Press **Enter** on the keyboard or click **Send Call** to complete the transfer.
-

Starting an Audio Conference

You may add participants to an audio conference call at any time, even while a collaboration session is in progress. The new participant will join both the audio and data portions of the conference. The most current data from the collaboration session will be displayed on the new participant's PC. A maximum of six participants are allowed in any given conference.

Procedure

- Step 1** Place a call to the first conference call destination.
- Step 2** Once you have established a connection, click the **Conference** button in the context-sensitive button bar.
- Step 3** In the destination box, enter the second conference call destination.



Timesaver You can drag conference call destinations from your personal and public dialing directories into the destination box.



- Step 4** Click **Invite** or press **Enter**.
 - Step 5** Click **Join** to set up a three-way conference between yourself, the first destination, and the second destination.
 - Step 6** Repeat steps 2 through 5 to add additional participants to the conference. A maximum of six participants are allowed in an audio conference.
-

Leaving a Conference Call

To leave an audio conference, click the **End Call** button in the context-sensitive button bar.

Configuring Your Voice Mailbox

Before you can access your voice mail with Cisco IP SoftPhone, you will need to configure the number for your voice mailbox.

Procedure

- Step 1** Click the **Settings** toolbar icon.



This opens the Call Control tab.

- Step 2** Enter the number for your voice mailbox in the Voice mail Destination box.
This number is assigned by your system administrator.

- Step 3** Click **OK**.
-

Checking Voice Mail

When you have a voice mail message, the messages icon in the icon bar turns red until you check your messages as follows:

Prerequisite

Configure your voice mailbox.

Procedure

Step 1 Click the **Voice Mail Message** toolbar icon.



A pop-up dialog box will display, showing the lines which have voice mail.

Step 2 Select the line for which you want to check voice mail.

Cisco IP SoftPhone will automatically dial your voice mailbox.

Step 3 Follow the voice prompts to access your voice mail.

Forwarding All Calls to Voice Mail

Use this procedure to automatically forward all calls to voice mail.

Prerequisite

Configure your voice mailbox.



Procedure

Step 1 Click the **Settings** toolbar icon.



This opens the Call Control tab.

Step 2 Enable the checkbox next to “Forward All Incoming Calls to Voicemail.”

Step 3 Click **OK**.

Removing Call Forward

Procedure

Step 1 Click the **Settings** toolbar icon.

Step 2 Uncheck the “Forward All Incoming Calls to Voicemail” option on the Call Control tab.

Step 3 Click **OK**.

Viewing Call History



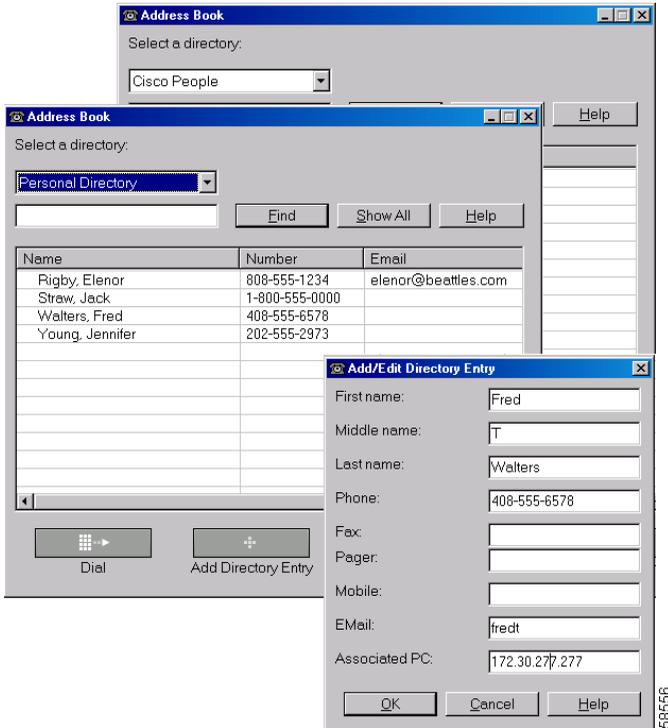
Whenever you place a call, Cisco IP SoftPhone displays the caller address, caller name, and the number dialed for the duration of the call. It also logs this information to a call history file. The call history file contains the call destination, time, and the call length.

To view the call history file, click the Call Log icon in the icon bar or click your right mouse button and choose **Call Logs** from the floating menu.

Using Dialing Directories

Cisco IP SoftPhone integrates with the directory service that is installed on the Cisco CallManager. Additionally, the Cisco IP SoftPhone provides a personal directory for you to store directory entries that are not available in the corporate or public directories. It also integrates with other private directories like those implemented by various email clients. Refer to Figure 6.

Figure 6 Dialing Directories



Dialing from the Online Directories

Procedure

Step 1 Click the **Directories** toolbar icon.



This opens the directories window.

Step 2 Select the desired directory from the drop-down list box.

Step 3 Enter the name of the person you want to call in one of the following ways:

- Click in the Find box and type the person's name.
- Click **Show All** and scroll to the name in the directory.



- Drag the name of the person you want to call from the directory to the destination box in the main dialing window.

Step 4 Click **Dial**.



Timesaver To narrow the list of names displayed in the directory, type the first few characters of the person's name in the find box and then click **Find**.

Adding a Directory Entry

Procedure

Step 1 Click the **Directories** toolbar icon.



This opens the directories window.

Step 2 Click the **Add** button to open the Add/Edit Directory Entry dialog window.

Step 3 Type the address information in the entry boxes.

Step 4 When you are finished, click **OK**.

Deleting a Directory Entry



Note You cannot delete names from a public directory.

Procedure

Step 1 Click the **Directories** toolbar icon.



This opens the directories window.

Step 2 Select the **Personal** directory name from the drop-down list box.

Step 3 Select the entry you want to delete.

Step 4 Click **Delete**.

The entry will be removed from the Directories dialog window.

Editing a Directory Entry



Note You cannot edit names in a public directory.

Procedure

Step 1 Click the **Directories** toolbar icon.



This opens the directories window.

Step 2 Select the Personal directory name from the drop-down list box.

Step 3 Double-click on the directory entry you want to edit, or select it with your mouse and then click **Edit**.

Step 4 This opens the Add/Edit Directory Entry dialog window.

Step 5 Make the desired changes to the address information.

Step 6 Click **OK** to enable your changes.

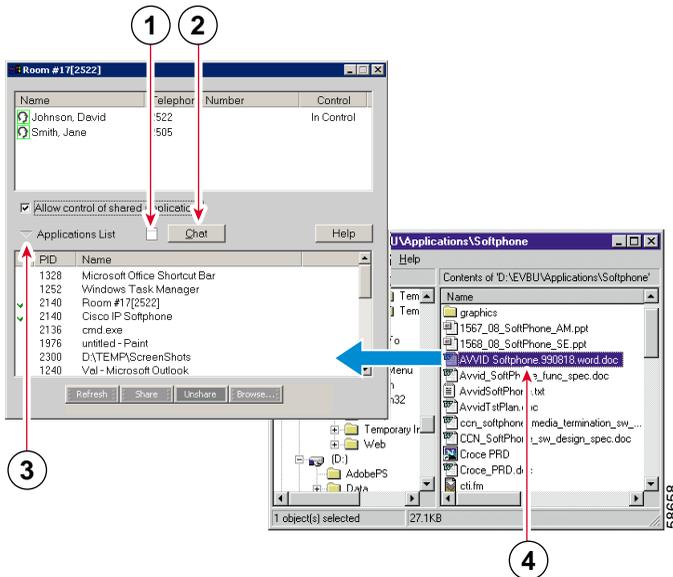
4 Collaborating with a Virtual Conference Room

Cisco IP SoftPhone includes a desktop collaboration utility called Virtual Conference Room. Using Virtual Conference Room, you can create online meetings where all parties can be heard and any party can share a document, application, or whiteboard with other participants. Only one computer needs to have the program, and any participant can be given control of the document. Additionally, you can integrate with Microsoft NetMeeting for video and other modes of collaboration.

Figure 7 illustrates how to use the collaboration features of Cisco IP SoftPhone.



Figure 7 Collaborating with Virtual Conference Room



| | |
|---|--|
| 1 | Click here to start a whiteboarding session. |
| 2 | Click here to start a chat session. |
| 3 | Roster window |
| 4 | Click here to share applications. |
| 5 | Drag file into roster window to share with other conference call participants. |

Collaboration Checklist

Before you begin a collaboration session, check the following settings:

- **Collaboration Setting.** Open the Settings window and verify that “Virtual Conference Room” is selected for the Collaboration Setting on the Advanced tab.
- **Associated PC Setting.** Open your personal or public directory and verify that the correct host name or IP address is specified for the “Associated PC” entry for all participants in the collaboration session, including yourself. If the “Associated PC” is not specified or incorrect for

a participant, you will need to add or update the entry in your personal directory, or contact your system administrator to update the public directory. When setting up a collaboration session, Cisco IP SoftPhone first looks for the participants in your personal directory. If it does not find an entry, it then looks in the public directory.

- **NetMeeting Settings.** If you have upgraded your NetMeeting installation (version 3.01 or greater) since installing Cisco IP SoftPhone, be sure to tune your audio settings and configure user settings for NetMeeting.

NetMeeting version 3.01 gets installed as part of the Cisco IP SoftPhone installation. You typically tune your audio settings and configure user settings for NetMeeting the first time you run Cisco IP SoftPhone.

When all collaboration settings are correct, the icon next to each participants name will be highlighted in green in the roster window.

Starting a Document Sharing Session

Procedure

Step 1 While in a call or audio conference, click the collaboration icon.



In the roster window, verify that each participant's name is highlighted in green.

If a participant's name is not highlighted in green on the roster, use the collaboration checklist to verify that all collaboration conditions are met.

Step 2 Click the **Applications List** button on the roster.

A list of the applications that are currently active on your computer will be displayed.

Step 3 Click **Browse** and choose the file you want to share, or open your Microsoft Windows Explorer and drag the file icon into the list of applications in the roster window.

Cisco IP SoftPhone will open the file and associated application on your desktop and add it to the list of active applications in the roster window.



Step 4 Select the file from the list of applications in the roster window and click **Share**.

The file will be displayed in a new window on each participant's computer screen, regardless of whether they have installed the associated application.

Initially, you have control of the file. However, you can allow transfer of control at anytime.



Timesaver You can also share an application or document by dragging it from the Windows Explorer onto the Applications button in the roster window.

Requesting Control of a Document

While in a document or application sharing session, only one person can be in control of a shared program at a time. Initially, the person who started the application or document sharing session has control. However, you can request control simply by double-clicking in the document sharing application window, or choosing **Control > Request Control** in the roster window. Cisco IP SoftPhone will send a message to the person in control, asking them to accept or reject your request. If the person does not respond to your request within 10 seconds, the request will fail.

Ending a Document Sharing Session

A document sharing session can only be ended by the person who initiated the session. To end a document sharing session, select the document in the roster window and click **Unshare**, or simply close the document or application. The document window for the file you are sharing will be removed from each participant's screen.

Starting a Whiteboard Session

Procedure

Step 1 While in a call or audio conference, click the collaboration icon



The roster will display showing all the participants in the call.

Step 2 In the roster window, verify that each participant's name is highlighted in green.

If a participant's name is not highlighted in green on the roster, use the collaboration checklist to verify that all collaboration conditions are met.

Step 3 Click the whiteboard icon in the roster.



An empty whiteboard window will display on each participant's computer screen.

Step 4 Use the whiteboard tools to illustrate your ideas in the whiteboard window. Each meeting participant will see your work without having access to your desktop.

For details on how to use the whiteboard tools, click the **help** button in the whiteboard window to access online help.

Ending a Whiteboard Session

To end a whiteboard session, close the whiteboard window after (optionally) saving its contents. When you close the whiteboard, it will remain open on each participant's computer screen, allowing them to save its contents on their local drive and then close the whiteboard window when they are done.

If you leave a whiteboard session but remain in the call, you can re-join the whiteboard session at any time by clicking the whiteboard button.



Note If you initiate a whiteboard session and exit Cisco IP SoftPhone while other participants remain in the whiteboard session, the whiteboard session will automatically terminate on each participants' PC.

Sending a Chat Message

Procedure

Step 1 While in a call or audio conference, click the collaboration icon.



The roster will display showing all the participants in the call.

Step 2 Click the **Chat** button to open the Chat window.

In the **Message** block, type the message you want to send, then do one of the following:

- To send a message to all meeting participants, select **Everyone In Chat** from the **Send to** drop-down list.
- To send a message to just one person, select the person's name from the **Send To** drop-down list.



Step 3 Click the **Send Message** button or press **Enter** on your keyboard to send the chat message.

Preparing for a Video Collaboration Session

To use the video collaboration features of NetMeeting, you will need to disable Virtual Conference Room and enable NetMeeting as follows.

Procedure

Step 1 Click the **Settings** toolbar icon.



This opens the Settings dialog window.

Step 2 Click the **Advanced** tab.

Step 3 Change the collaboration setting to NetMeeting.

Step 4 Click **OK**.

Step 5 Restart Cisco IP SoftPhone for this setting to take effect.

When you restart Cisco IP SoftPhone, Cisco IP SoftPhone will place calls using the NetMeeting user interface. To start NetMeeting, open the roster and click the **Launch NetMeeting Call** button.

See the Microsoft NetMeeting online help for details on how to do use the video collaboration features of NetMeeting.

CISCO SYSTEMS



Corporate Headquarters

Cisco Systems, Inc.
170 West Tasman Drive
San Jose, CA 95134-1706
USA
<http://www.cisco.com>
Tel: 408 526-4000
800 553-NETS (6387)
Fax: 408 526-4100

European Headquarters

Cisco Systems Europe
11 Rue Camille Desmoulins
92782 Issy-les-Moulineaux
Cedex 9
France
<http://www-europe.cisco.com>
Tel: 33 1 58 04 60 00
Fax: 33 1 58 04 61 00

Americas Headquarters

Cisco Systems, Inc.
170 West Tasman Drive
San Jose, CA 95134-1706
USA
<http://www.cisco.com>
Tel: 408 526-7660
Fax: 408 527-0883

Asia Pacific Headquarters

Cisco Systems Australia, Pty., Ltd
Level 17, 99 Walker Street
North Sydney
NSW 2059 Australia
<http://www.cisco.com>
Tel: +61 2 8448 7100
Fax: +61 2 9957 4350

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