



Lotus®

Sametime™ 3.1

Quick Reference Guide

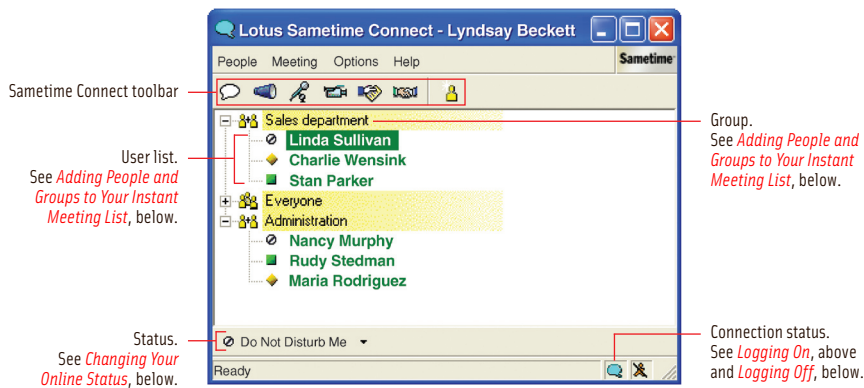


Getting Started with Sametime

Sametime is a communications program that enables real-time chat sessions and online meetings with collaborative screen, whiteboard, and file sharing.

Logging On

When you start Sametime you are prompted to log on. In the **Log On to Sametime** dialog box, type your user name and password. Choose your startup status (see *Changing Your Online Status*, below) and click **Log On**. The **Lotus Sametime Connect** window opens.



Note: To reconnect while Sametime is running, click **Disconnected**.

Logging Off

In the **Lotus Sametime Connect** window, choose **People** ► **Log Off from Sametime**. Choose **People** ► **Exit** to log off and exit the program.

Changing Your Online Status

Your online status indicates your availability for online chats and instant meetings.




Click the arrow ▼ at the bottom left of the **Lotus Sametime Connect** window and choose an option. Status icons appear to the left of the user names: Active - , Away - , and Do Not Disturb - .

To customize the status message that appears to other users: click the arrow ▼ at the bottom left of the **Lotus Sametime Connect** window and choose **Edit Current Status Message**. Type your message and click **OK**.

Note: Changing your status message does not change your status, only the message text.

To hide your active status from other users: choose **Options** ► **Who Can See If I Am Online**. In the **Who Can See If I Am Online** dialog box, click either **ONLY list below** or **Everybody EXCEPT list below** and click **Add**. In the **Add to Privacy List** dialog box, click **Directory**. In the **Add to Who Can See Me List** dialog box, select the users and groups and click **Add**. Click **Close** and click **OK**.

Adding People and Groups to Your Instant Meeting List

1. Click the Add a person/group button . In the **Add Person or Group** dialog box, click **Directory**.
2. In the **Add to Contact List** dialog box, do one of the following.
 - **Choose a person** (appears in the directory list as ). Name the group to which you want to add the person or choose an existing group name. Click **Add**.
 - **Choose a group** (appears in the directory list as ). Click **Add**.
3. Repeat step 2 as necessary to add people and groups to your meeting list. Click **Close**.

To create a personal group: choose **People** ► **Add Personal Group**. In the **New Personal Group** dialog box, enter the personal group name and click **Add**. See above to add people to your personal group.

Instant Chat Meetings

Use instant chat meetings for informal questions or discussions with people on your user list.

Initiating a Chat Meeting

To chat with a single user: right-click the user name and choose **Chat**. Type your message and press **ENTER**.


To request a chat meeting with all members of a group: in the **Lotus Sametime Connect** window, right-click the group name and choose **Chat**. In the **Start Instant Meeting** dialog box, click **Send**.

To request a chat meeting with specific users: press and hold **CTRL** to select multiple users, right-click and choose **Chat**. In the **Start Instant Meeting** dialog box, click **Send**.


Participating in a Chat Meeting

To accept an invitation to a chat meeting: in the **Invitation from** dialog box, click **Join**. Type your message and press **ENTER**.

To invite another participant to an active meeting: click **Invite Others**. In the **Invite Others to a Meeting** dialog box, click **Add Invitees**. In the **Add to Invitation** dialog box, enter the user name, click **Add** and **Close**. In the **Invite Others to a Meeting** dialog box, click **Send**.

To leave the chat meeting: click .

Creating a One-Way Message

In the **Lotus Sametime Connect** window, select the recipients of the message and click the **Send a one-way message**  button. In the **Send Announcement** dialog box, type your message and click **Send**.

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Scheduling and Editing Meetings

Meetings can be initiated instantly or scheduled ahead of time.

Working with Instant Meetings

To initiate an instant meeting: select a group and/or people from the Lotus Sametime Connect window, right-click, and choose **Share**. In the **Start Instant Meeting** dialog box, click **Send**.

To accept an instant meeting invitation: click **Join** in the **Invitation** dialog box.

To decline an instant meeting invitation: click **Respond** in the **Invitation** dialog box, type a message stating your decision, click **Send**, and click **Close** twice.

Scheduling a Meeting

1. In the **Lotus Sametime Connect** window, choose **Meeting** ► **Schedule a Meeting**. Type your user name and password in the browser window and click **Log On**.
2. On the **Essentials** tab, choose the meeting type from the **Meeting type** list. If you choose **Broadcast Presentation** or **Demo**, specify who the presenters are. Click **Add** or **Remove Presenters** to choose from a directory list.
3. Type a meeting name in the **Meeting name** box.
4. Set the date, time, and duration in their respective boxes. If the meeting is to begin immediately, click the **Start Now** option and specify the duration.

To specify a recurring meeting: click **Repeat**. In the **Repeat Rules** window, set the repeat schedule and click **OK**.

To record the meeting for participants unable to attend: check the **Record this meeting so that others can replay it later** box . See [Viewing a Recorded Meeting](#), below.

To attach files to present on the whiteboard: on the **Files** tab, click **Attach a File**. In the **Whiteboard Attachments** window click **Browse**, select the file, click **Open**, and click **OK**.

To restrict the meeting to specific participants: on the **Security** tab, click **Add or Remove People**. In the **Add or Remove People** window, choose the participants to whom you're giving restricted access (press and hold CTRL to choose multiple names) and click **Add**. Click **OK**. Participants must log on to Sametime to enter the meeting.

Note: Restricting meeting participants does not send an invitation to them. See [Inviting Participants to Your Meeting](#), below.

5. Click **Save**. The scheduled meeting appears in the Lotus Sametime Meeting Center. Click the **Scheduled** link to view currently scheduled meetings.

Editing a Scheduled Meeting

In the **Lotus Sametime Connect** window, choose **Meeting** ► **Schedule a Meeting**. In the Lotus Sametime Meeting Center, click the meeting name and click **Edit Meeting**. Make the necessary changes and click **Save**.

Note: Only the meeting creator or the moderator can edit a meeting.

Inviting Participants to Your Meeting

E-mail participants ahead of time with the meeting name, date, and start time.

Attending and Viewing a Scheduled Meeting

In the **Lotus Sametime Connect** window, choose **Meeting** ► **Attend a Meeting** and log on. In the Lotus Sametime Meeting Center, click an active meeting name to attend the meeting, or click the **Scheduled** link to view upcoming meetings.

Viewing a Recorded Meeting

In the **Lotus Sametime Connect** window, choose **Meeting** ► **Schedule a Meeting**. In the Lotus Sametime Meeting Center, click the **Recorded** link and click the meeting name. Click **Replay the Meeting**.

Using Sametime Meeting Tools

Once you're signed in to a Sametime meeting, you can communicate with other participants using instant messaging, and work collaboratively using shared programs, shared files, and the whiteboard.

Using Meeting Room Instant Messaging


On the **Chat** tab at the bottom of the window, type your text and press ENTER.

Sending a Web Page


Using the instant messaging tool, inform participants that you are about to send a Web page. On the **Web Pages** tab at the bottom of the window, enter the Web page address in the **Web page to send** box, and click **Send**. A new browser window opens on all participants' workstations displaying the specified Web page. Press ALT+TAB to return to the **Sametime Meeting Room** window.


Sharing Your Screen

Screen sharing enables participants to view specified portions of your screen. If participants have the appropriate permissions, (see [Granting Individual Permissions for Screen Sharing](#), below) they can take control of programs on your desktop.

To share a program: click the **Share a Program** button , choose an active program and click **Share Program**. To grant control, click **Allow Control** at the top right of the shared program window. To stop sharing, click **Stop Sharing**.

To share your entire screen: click the **Share My Entire Screen** button . To grant control, click **Allow Control** in the **Screen Sharing** dialog box. To stop sharing, click **Stop Sharing**.

To share a portion of your screen: click the **Share Part of My Screen with a Frame** button . Resize the shared portion by dragging the edges of the frame and reposition by dragging the frame's title bar. To grant control of the shared portion, click **Allow Control** at the top right of the shared frame. To stop sharing, click **Stop Sharing**.

Note: Once the meeting moderator has granted control of his or her screen, participants must still click the **Control Screen Sharing** button  to take control of shared programs.

Granting Individual Permissions for Screen Sharing

To grant permissions to individual participants: right-click the participant name and choose **Grant Permissions** ► **Permission to Edit/Share**.

To revoke permissions from individual participants: right-click the participant name and choose **Revoke Permissions** ► **Permission to Edit/Share**.

Using the Whiteboard

In the **Sametime Meeting Room** window, click **Whiteboard**. The screen switches to the whiteboard view. Use the toolbar buttons to make your presentation.

To view an attached whiteboard file: choose the file name from the top menu in the whiteboard area. The file contents appear in the window.

To save Whiteboard contents for future reference: click the **Save Whiteboard Changes** button .

To view Whiteboard contents after the meeting has ended: in the Lotus Sametime Meeting Center, click the meeting name, scroll to the **Attachments** section and click the whiteboard file.

Polling

Use polls during a meeting to gather opinions from the participants.

To create a new poll: on the **Poll** tab, click **New**. In the **New Poll** dialog box, type the poll question and specify the poll type (e.g. **Yes/No**, **True/False**, etc.). Specify any other options and click **Send**.

To respond to a poll: enter your response and click **OK**.