



VidyoDesktop™

Quick User Guide

Product Version 3.5

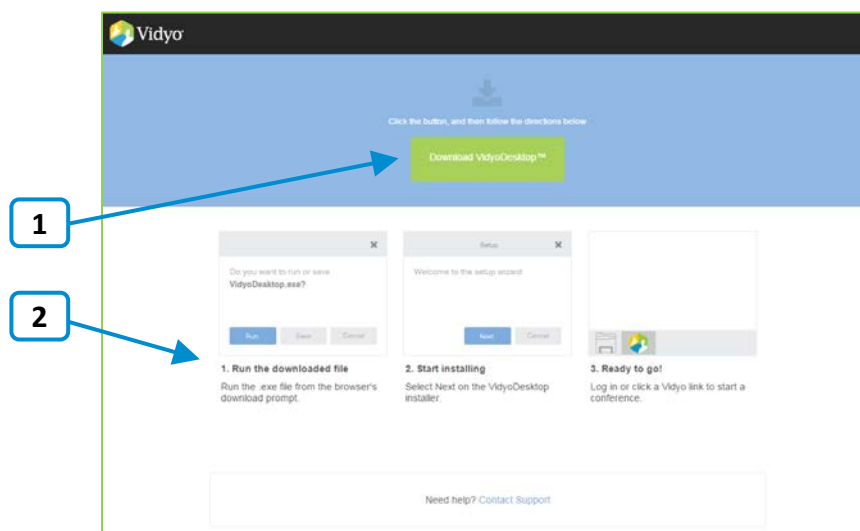
Document Version A

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VidyoDesktop Quick User Guide

VidyoDesktop enables you to easily join Vidyo conference calls, either as a guest or as a registered user, make point-to-point calls, invite others to your meetings, and control your Vidyo conferencing experience all from a single application with an intuitive user interface.

Downloading VidyoDesktop and Logging In

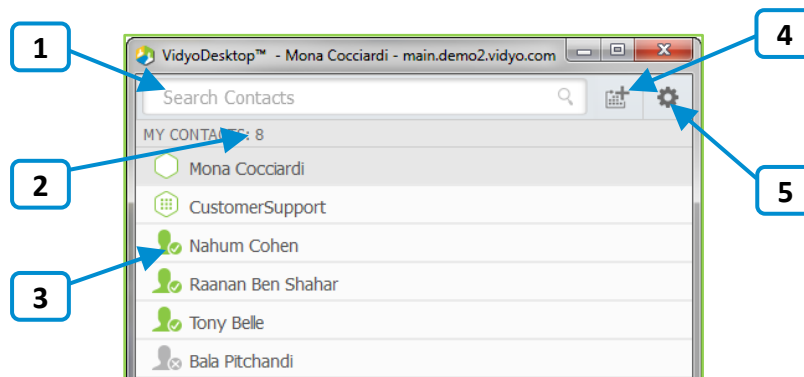


To download VidyoDesktop, use your favorite browser to enter the URL of the VidyoPortal™ that you want to connect to.

1. Click **Download VidyoDesktop**.
2. Follow the on-screen instructions.
3. When you are ready to log in, enter your username and password and click **Log In**.


Pre-Call

Viewing Your Contacts List




1. Enter a name in this text box to search for a contact.


As soon as you begin typing, search results appear. If any users have the same name, the search results will display those users' email addresses beside their names in order to help you differentiate between the users.

Note: Beside each name in the search results, a  icon appears. Click this icon if you want to add the person to your contacts list.

2. The number of contacts in your contacts list.
3. The status and name of the contact or room. Click to view information about the contact or room, place a direct call to the contact, join the contact's room, or join a public room.

For more information about placing a call or joining a contact's room, see "Connecting to Contact's Room or Connecting to a Contact Directly" on page [5](#).

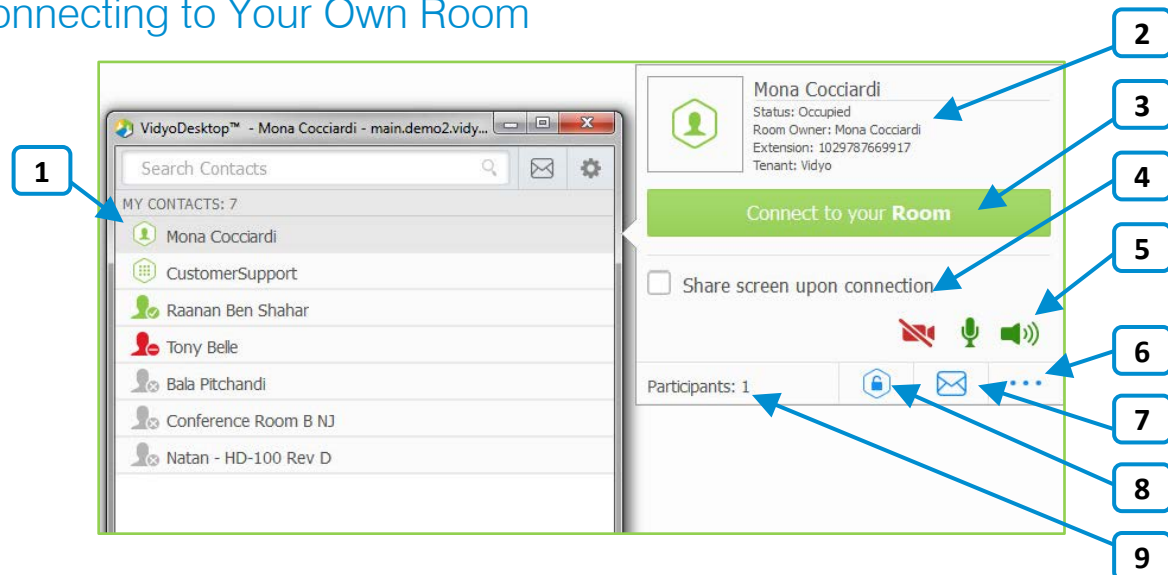
4. Click  to invite guests to a Vidyo meeting and automatically schedule the meeting on your calendar.

When you click , a meeting appointment automatically opens using your default mail application. Depending on what type of room you selected on the Options screen (see step [5](#) on page [15](#)), the meeting invitation pre-fills either with a unique room link to a Vidyo room that was created for that particular meeting (also known as a scheduled room) or with your personal Vidyo room information (also known as "My Room"). You can select the date and time for the meeting, edit the content, and send it to guests that you want to invite. This meeting will be automatically scheduled on your calendar.

5. Click  to open the Configuration and Status screen.





For more information, see "Using the Configuration and Status Screen" on page [14](#).

Connecting to Your Own Room





1. Click to view more information about your room or to join your room.
Your personal room is always the first entry in the list of contacts.
2. The status of the room, the room's owner, the room's extension, and the tenant name.
For more information about status, see "Understanding the Status Icons" on page 7.
3. Click **Connect to your Room** to join your room.
4. Select the **Share screen upon connection** check box if you want to share your screen with the rest of the participants when you join the meeting.

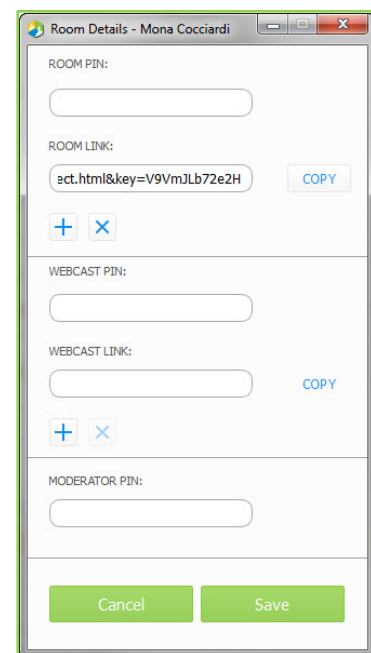
If you have only one screen, that screen is shared as soon as you join; if you have multiple screens, you are asked to select which screen you want to share.

5. Click , , and/or  if you want your camera, microphone, and/or speaker to be muted when you join the meeting.
6. Click  to access the Room Details pop-up.


The Room Details pop-up enables you to enter a room, webcast, or moderator PIN, or copy the room or webcast link so you can send it to others.

7. Click  to invite guests to a Vidyo meeting without automatically scheduling the meeting on your calendar.

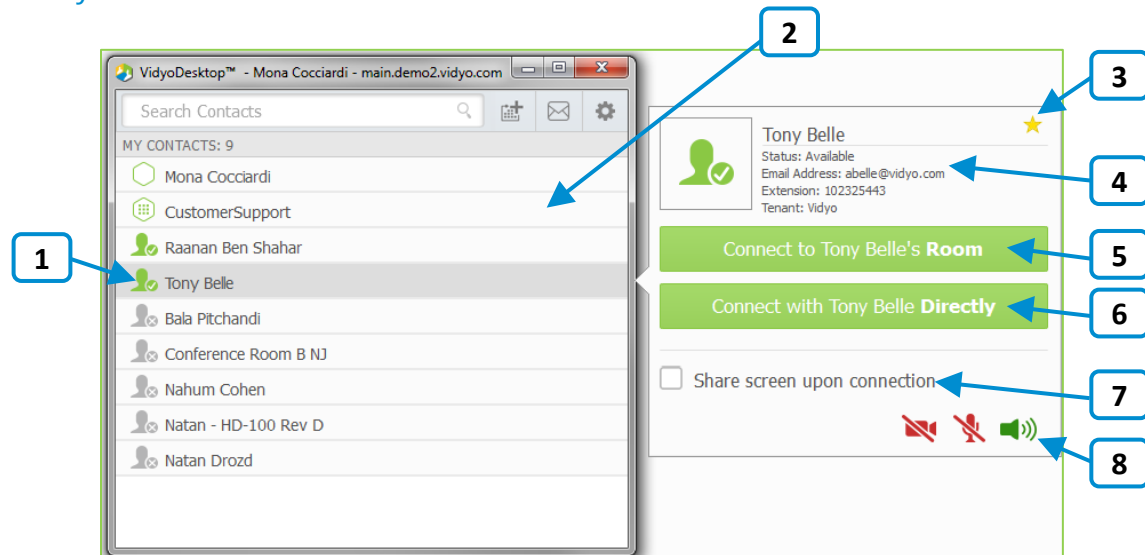
When you click , a meeting appointment automatically opens using your default mail application. Depending on what type of room you selected on the Options screen (see step 5 on page 15), the meeting invitation pre-fills either with a unique room link to a Vidyo room that was created for that particular meeting (also known as a scheduled room) or with your personal Vidyo room information (also known as "My







Room”). You can add the date and time for the meeting, edit the content, and send it to guests that you want to invite. This meeting will *not* be automatically scheduled on your calendar.

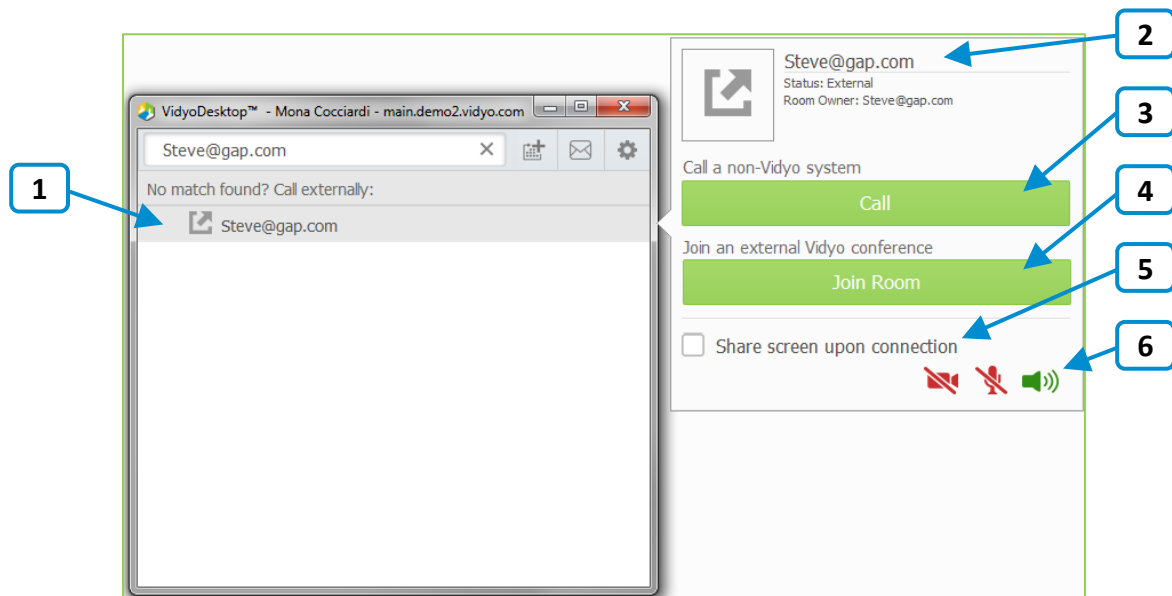
8. Click  to lock your room.
9. The number of participants in your room (if any).

Connecting to a Contact’s Room or Connecting to a Contact Directly






1. Click to view more information about the contact, place a direct call to the contact, or join the contact’s room.
2. For public rooms, click the room to view more information about the public room or join the public room. You cannot make a direct call to a public room.
3. Click  to remove this contact from your contacts list.
4. The name and status of the contact, the contact’s extension, and the tenant name. For more information about status, see “Understanding the Status Icons” on page 7.
5. Click **Connect to [Contact]’s Room** to join that contact’s room.
6. Click **Connect with [Contact] Directly** to place a direct call to the contact. If this contact is in a busy or offline state, this button will be disabled.
7. Select the **Share screen upon connection** check box if you want to share your screen with the rest of the participants when you join the meeting. If you have only one screen, that screen is shared as soon as you join; if you have multiple screens, you are asked to select which screen you want to share.
8. Click , , and/or  if you want your camera, microphone, and/or speaker to be muted when you join the meeting.

Placing an External Call






1. Click to place an external call to a contact that was not found in the directory.
2. Since these contacts are not in your directory, the only status available is that they are external contacts and are the room owner.
3. If you are calling a non-Vidyo system (that is, a legacy H.323/SIP endpoint), tap **Call** to place a direct call to that endpoint.
4. If you are joining an external Vidyo conference on another VidyoPortal, tap **Join Room** to join that room.

The **Join Room** button appears only if the address you entered is in a valid format for an address on a different VidyoPortal.






5. Select the **Share screen upon connection** check box if you want to share your screen with the external participant when you join the meeting.
If you have only one screen, that screen is shared as soon as you join; if you have multiple screens, you are asked to select which screen you want to share.
6. Click , , and/or  if you want your camera, microphone, and/or speaker to be muted when you join the meeting.

Understanding the Status Icons

Contact Status

Icon	Description
	The contact is online and available to receive a direct call or to join a room.
	The contact is online but is currently in a call or meeting. You cannot make a direct call to this contact; however, you can join the contact's room.
	The contact is offline (not logged into the VidyoPortal). You cannot make a direct call to this contact; however, you can join the contact's room.

Room Status

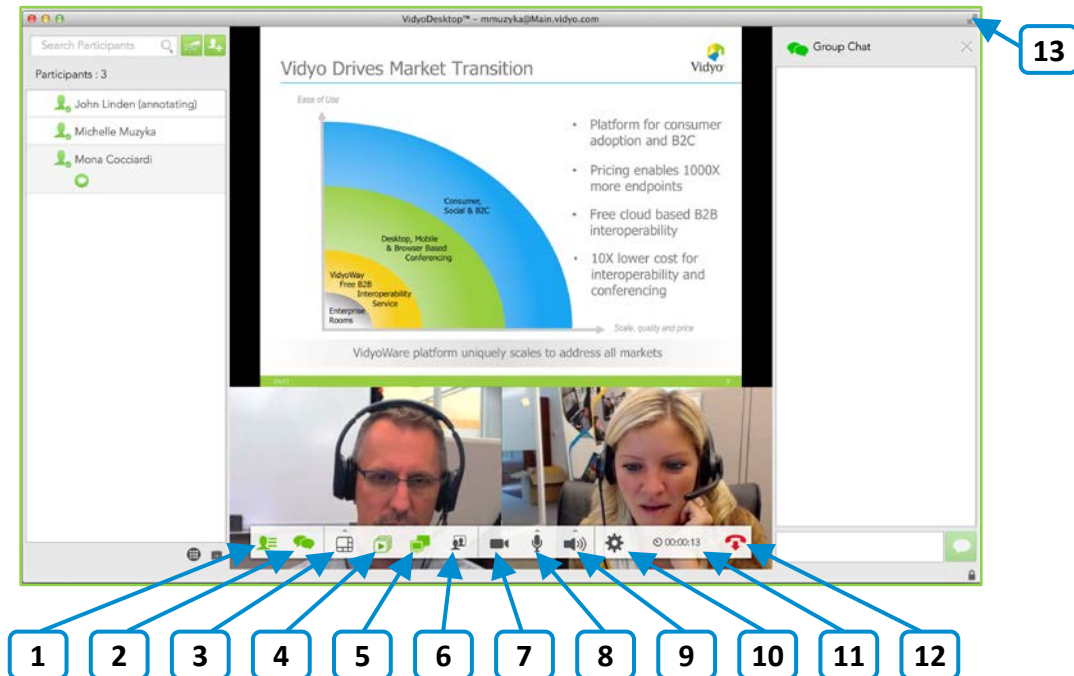
Icon	Description
	The room is available and empty, so you can enter the room.
	The room is available and PIN-protected. If you attempt to join the room, you will be asked to enter a PIN.
	The room is occupied but available to enter.
	The room is locked, so you cannot enter it.
	The room is full, so you cannot enter it.

In-Call

As soon as you join a meeting with VidyoDesktop, you see the other participants in the meeting, any content that is being shared, and the task bar at the bottom of the screen. The only exception to this is if Presenter Mode or Waiting Room Mode has been enabled. For more information about these modes, see “Presenter Mode” on page 13 and “Waiting Room Mode” on page 14.

Performing Tasks During a Meeting

Using the Task Bar






1. Click  to:

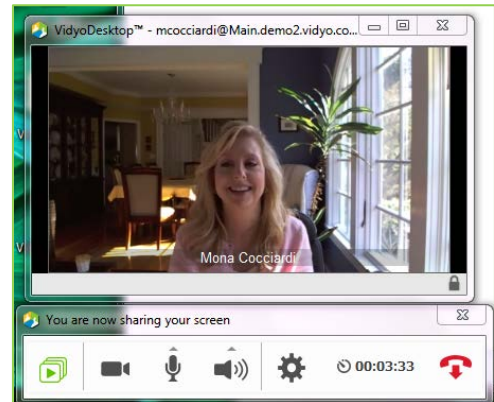
- View a list of the meeting participants.
For first-time users, the participants list is displayed by default when the call starts. You can select to view or hide the participants list while you are in a call, and your selection will be remembered for subsequent calls.
- Mute the audio, mute the video, or disconnect a specific meeting participant (if you are the room owner).
- Chat with a specific meeting participant.
- Invite participants to the meeting via the contact list or by email.
- Lock or unlock the meeting (if you are the room owner).
- Launch the Control Meeting page, which provides access to the meeting moderation options.




For more information about moderating the meeting, see “Controlling the Meeting” on page 11.

For more information about the tasks you can perform from the participants list, see “Using the Participants List” on page 10.


2. Click  to chat with all the participants as part of the meeting group chat.
3. Click  to select how to view the participants' video windows during the meeting, and to control the maximum number of windows.
4. Click  to select which application or screen you wish to share in the meeting.

If you choose to share your entire desktop, the participants list and the task bar appear in a small window (as shown in the screenshot on the right). This reduces the chance of inadvertently sharing your screen with other meeting participants.



5. Click  to toggle among the applications or screens that are being shared during the meeting.
6. Click  to toggle your self-view preference.
7. Click  to show or hide the video from your camera.

When the camera video is off,  appears on the screen.

8. Click  to mute, unmute, and control your microphone volume.

When the microphone is muted,  appears on the screen.


9. Click  to mute, unmute, and control your speakerphone volume.

When the speaker is muted,  appears on the screen.

10. Click  to open the Configuration and Status screen.

For more information, see “Using the Configuration and Status Screen” on page 13.

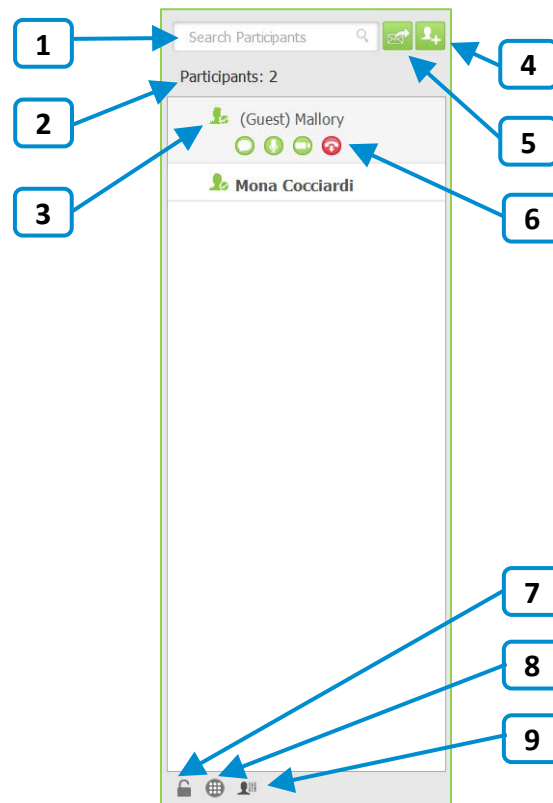
11. Click  to toggle between the meeting time and a clock.



12. Click  to end the meeting.


13. Click  to enter and exit full screen.








On Mac OS, this button appears on the upper right side of the video window. On Windows, this button appears on the task bar.

Using the Participants List



1. Enter a name in this text box to search for a participant.
2. The number of participants in the call.
3. The status and names of the participants in the call.
 - If there are any guest users on the call, they appear as “(Guest) username” in the list.
 - If any users have the same name, the list will display those users’ email addresses beside their names in order to help you differentiate between the users.
4. Click  to search for contacts so you can invite them to the meeting.
5. Click  to invite guests to a Vidyo meeting without automatically scheduling the meeting on your calendar.

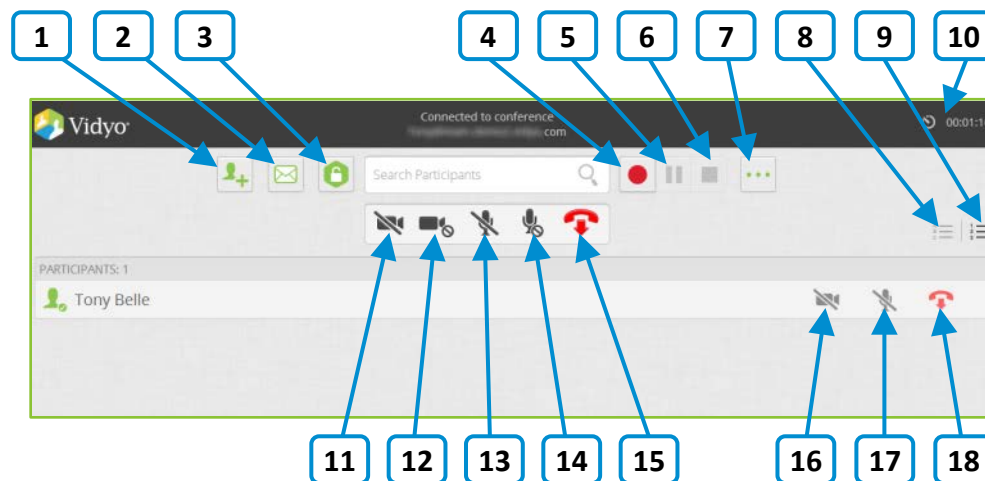
When you click , a meeting appointment automatically opens using your default mail application. Depending on what type of room you selected on the Options screen (see step 5 on page 15), the meeting invitation pre-fills either with a unique room link to a Vidyo room that was created for that particular meeting (also known as a scheduled room) or with your personal Vidyo room information (also known as “My Room”). You can add the date and time for the meeting, edit the content, and send it to guests that you want to invite. This meeting will *not* be automatically scheduled on your calendar.




6. Click on a participant's name to access these functions:
 -  enables you to chat with the selected participant.
 -  enables you to mute the microphone of the selected participant (if you are the room owner).
 -  enables you to stop the video feed from the camera of the selected participant (if you are the room owner).
 -  enables you to disconnect the selected participant (if you are the room owner).
7. Click  to lock or unlock the room while in the call (if you are the room owner).
8. Click  to access the DTMF dialpad.
9. Click  to access the Control Meeting page on the VidyoPortal (if you are the room owner).


For more information about how to use the Control Meeting page, see the following section.

Controlling the Meeting


Note: The Control Meeting page can be accessed from VidyoDesktop only by the room owner or by participants who have been provided with the Moderator PIN.




1. Click  to add a participant to your room.
2. Click  to invite a participant to your room via email.
3. Click  to toggle between locking and unlocking your room.

4. Click  to record or to record and webcast a meeting using a selected VidyoReplay™ record profile.


This option is available only if your system includes VidyoReplay. If you need more information about which record profile to select, contact your system administrator.

5. Click  to pause a recording or webcast.

This option is available only if your system includes VidyoReplay.

6. Click  to stop a recording or webcast.


This option is available only if your system includes VidyoReplay.

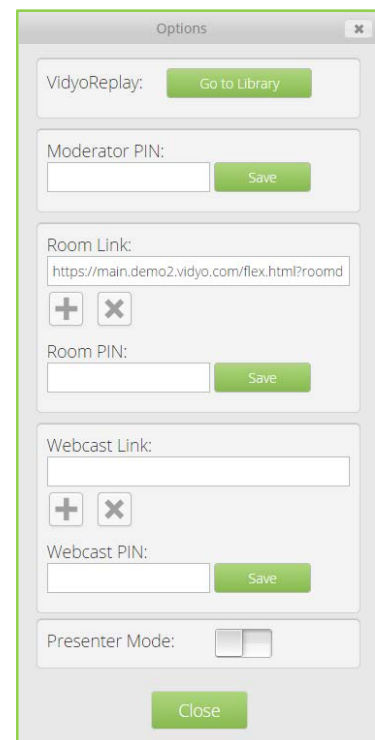
7. Click  to access the Options pop-up.





The Options pop-up enables you to:








- Access the VidyoReplay library (for systems that include VidyoReplay). For more information about the VidyoReplay library, refer to the *VidyoReplay Administrator Guide*.
- Set a moderator PIN.
- Set a room or webcast PIN, and create or remove a room or webcast link.
- Enable or disable Presenter Mode.

When a meeting is in Presenter Mode, the participants can view only the presenter, the audio for all the participants (except for the presenter) is muted, the

participants must click the  icon on the task bar to request to speak, and the presenter can enable specific participants to speak. For more information, see “Presenter Mode” on page 13.



8. Click  to sort the list of your participants alphabetically.
9. Click  to sort the list of your participants in attendance order.
10. Click  to toggle between viewing the current meeting duration and viewing the current time of day.
- The meeting timer is the default.
11. Click  to disable video on all participants' cameras without allowing them to re-enable it.

12. Click  to disable video on all participants' cameras while allowing them to re-enable it.
13. Click  to mute audio on all participants' microphones without allowing them to re-enable it.
14. Click  to mute audio on all participants' microphones while allowing them to re-enable it.
15. Click  to disconnect all participants from your meeting room.
16. Click  to disable video on the selected participant's camera without allowing that participant to re-enable it.
17. Click  to mute audio on the selected participant's microphone without allowing that participant to re-enable it.
18. Click  to disconnect the selected participant from your meeting room.


Joining a Meeting with Presenter Mode or Waiting Room Mode Enabled

Presenter Mode

Instead of seeing all the meeting participants as soon as you join a meeting, the following occurs when Presenter Mode is enabled:

- You see the presenter only, or if the presenter has not yet joined the meeting, you see a message telling you to please wait for the meeting to begin.
- Your microphone is muted.
- The task bar looks like this:



Once the meeting begins, you must click  if you want to speak. The presenter can then select which participants can speak from those requesting to do so.

If Presenter Mode gets disabled during the meeting, the message "All conference functions are now available" appears, and the task bar updates to include all of the normal in-call icons.

Waiting Room Mode


Like with Presenter Mode, when you join a meeting where Waiting Room Mode is enabled and the room owner has not yet joined the call, you do not see all of the meeting participants; instead:

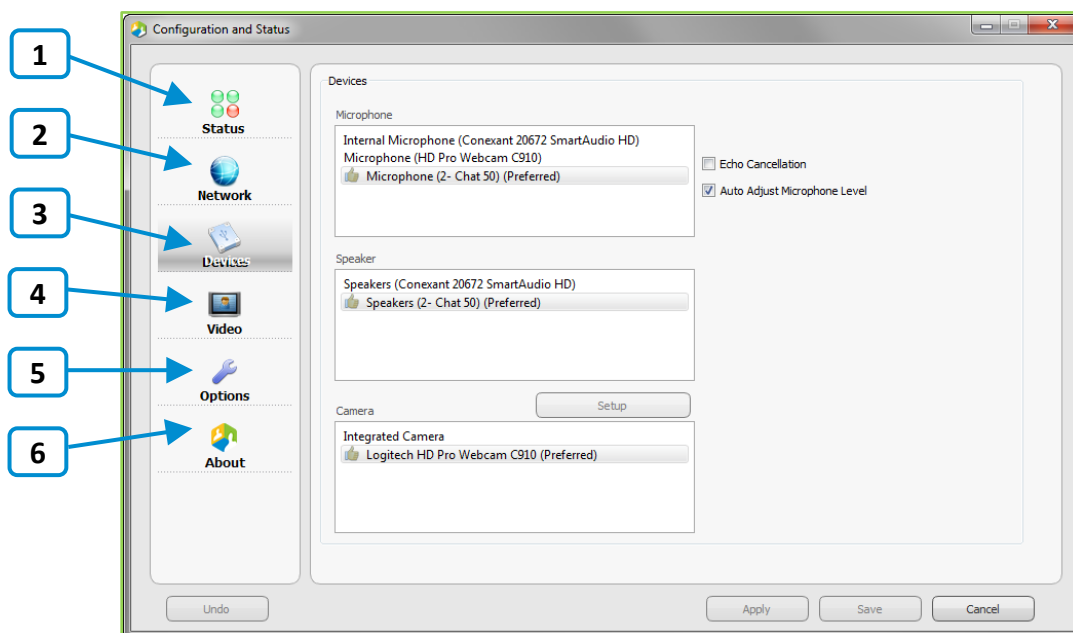
- You see a message telling you to wait for the meeting to begin.
- Your microphone is muted.


As soon as the room owner joins the meeting (or the meeting moderator manually disables Waiting Room Mode), you see all the other meeting participants, you see any shared content, and the full task bar appears on the screen.


Using the Configuration and Status Screen

To access the Configuration and Status screen:

- If you are not in a call, click  on the contacts list.
- If you are in a call, click  on the task bar.



1. Click  **Status** to:
 - View user and meeting status information.
 - Generate diagnostics reports.

2. Click  **Network** to configure the network settings:
 - In the VidyoPortal section:
 - Select the **Validate Server Certificate** check box only if you are testing encryption with a self-signed certificate. Otherwise, do not select this check box.


- Enter the allowed media port range (between 50000 and 65535).
- In the VidyoProxy section, select the **Always use VidyoProxy** check box if you want VidyoDesktop to always connect via the assigned VidyoProxy. Vidyo recommends that you try to connect directly.
- In the Web Proxy section, select the **Use settings from operating system** check box if you want VidyoDesktop to follow the Internet Explorer Local Area Network settings on Windows or the OS settings on Mac. Otherwise, select the **Use the following settings** check box and then select:
 - **Automatically detect settings** to configure VidyoDesktop to try to connect using WPAD (Web Proxy Auto-Discovery Protocol).
 - **Use automatic configuration script** to configure VidyoDesktop to use a specific PAC script for connection.
 - **Use proxy server** to configure VidyoDesktop to connect through a specific Web Proxy server. If you select this check box, enter the Web Proxy address, port, username, and password.


If you are trying to connect to a Web Proxy that requires authentication, you must enter the username and password regardless of the selected method.





Note: For help with configuring your network settings, talk to your system administrator.

3. Click  **Devices** to:



- Select the microphone, speaker, and camera you are using.
- Control echo cancellation.
- Set whether you want the microphone level to be automatically adjusted.



4. Click  **Video** to select your video quality preferences.

5. Click  **Options** to:

- Select the language of the user interface.
- Select the default room type you want to use each time you click  or  to schedule a Vidyo meeting and invite guests to that meeting:
 - If you want to schedule the meeting in a new meeting room (also known as a scheduled room) each time you click  or , select **A new room will be created for each meeting invitation**.

In addition, you can select the **Always add PIN to my meetings** check box to require guests to enter a PIN to access the room.

- If you want to schedule the meeting in your own personal room (also known as “My Room”) each time you click  or  select **Your personal Vidyo room information will be used for each meeting invitation.**

Note: If the “Make Scheduled Rooms available on your tenant” option is disabled on the VidyoPortal, this feature will be disabled on VidyoDesktop as well. In such cases, each time a user clicks  or , the new meeting will be scheduled in that user’s personal room, and all the fields on the Options screen related to the scheduled room feature will be grayed out.

- Select which ringing device you want VidyoDesktop to use.
- Select whether you want VidyoDesktop to:
 - Automatically start when you log in.
 - Automatically answer incoming calls.
 - Play a tone whenever a participant joins or leaves a call.
 - Start the conference in Full Screen mode.
 - Show the participants’ names on-screen during calls.

6. Click  **About** to:

- View the VidyoDesktop version being used.
- Check for software updates.