Centra 7

Basics Guide

Symposium, Conference, and eMeeting
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Centra 7™ is a powerful software application for real-time collaboration and content management across your enterprise.

Centra 7 includes Symposium, Conference, and eMeeting, applications that increase workforce productivity, drive new revenue opportunities, ensure successful application deployments, and enhance employee competencies.

Symposium

Centra Symposium is a complete set of capabilities for live, collaborative and asynchronous learning in a virtual classroom setting.

Conference

Centra Conference is best suited to Web-based seminars and large group presentations with managed interactivity.
eMeeting

Centra eMeeting provides dynamic interaction of live meetings, with an easy-to-use self service meeting scheduler.

About this Document

This Guide is intended for use by all Centra 7 users. This document provides a brief overview of the features, tools, and components of Symposium, Conference, and eMeeting.

This document contains:
- Step-by-step instructions for performing tasks
- Recommendations for using Centra tools
- Tips that enhance your effectiveness

This document is organized by roles. To perform the procedures in the Agenda Builder, Leader, and Event Manager sections, you need these privileges. Check with your Event Manager to obtain a privilege.

Technical Requirements

Verify the following technical requirements prior to installing the Centra 7 client. Your system (hardware and software) must meet the minimum requirement or recommendation for each category before launching Symposium, Conference, or eMeeting.

<table>
<thead>
<tr>
<th>Minimum</th>
<th>Recommended</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 98, 2000 (SP1), XP</td>
<td>Internet Explorer 6.x</td>
</tr>
<tr>
<td>Internet Explorer 5.x, 6.x, Netscape 4.5x, 4.7x, 7.x</td>
<td>CPU: P500+ MHz</td>
</tr>
<tr>
<td>CPU: P350 MHz</td>
<td>Memory: 256+ MB RAM</td>
</tr>
<tr>
<td>Memory: 128 MB</td>
<td>Disk: 200+ MB free (for content &amp; recordings)</td>
</tr>
<tr>
<td>Disk: 40 MB free space</td>
<td>Network: 128+ kbps</td>
</tr>
<tr>
<td>Network: 28.8 kbps</td>
<td>Sound card, headset</td>
</tr>
<tr>
<td>Monitor: 16 bit colors (high color)</td>
<td></td>
</tr>
</tbody>
</table>

Centra Technical Support

Centra’s dedicated Technical Support team welcomes questions, comments, and feedback. Input helps us to continuously improve and enhance our products and services.
For support information, content Centra Technical Support at http://www.centra.com/supportinfo.asp

Documentation for Centra products are located on the support site.

Training, Education and Certification

As a new or experienced Administrator, Event Manager, Agenda Builder, or Event Leader, effectiveness depends on the knowledge of how to best use Centra tools, controls, and features.

Consider joining one of Centra’s Training, Education and Certification programs to further increase knowledge and familiarity with Centra products.

Centra Education and Training Services offers online Symposium sessions, workshops, and programs designed specifically for each type of user. Work with Centra staff and other Leaders to increase understanding of and gain hands-on experience with Centra products.

For more information on Centra Education and Training Services, visit our Online Course Catalog at http://www.centra.com/education/courses.asp

Other Information Resources

Access online help from the following areas:

- From the Centra Home Page, click Help.
- For Administrator access, go to the Administrator menu and click Administrator Help.
- In a Symposium or Conference session, select Content and Search from the Help menu.
Before attending a Centra 7 session, make sure that you have a Centra user account or have been invited as a “guest.”

If you received specific registration instructions from your organization’s Event Manager or System Administrator, please follow those steps.

If you have been pre-registered by your System Administrator or Event Manager and have received a user account, you may log in immediately. Refer to “Logging In” for more information on how to log in to the Centra Server.

**Centra 7 Multi-Lingual Support**

Centra 7 offers multi-lingual support. Organizations can install multiple languages on a single Centra Server. Users with different language versions of the Centra 7 interface can attend the same session.

Users set their language preference on the My Profile page and can update it at any time. Users can also change their preferred language...
on the logon page. When users log in to the Centra Server, the Centra 7 pages and the client appear in the user’s language.

Notes:
- Centra 7 version 7.0 does NOT translate audio, data, or session content.
- It is recommended that the client computer’s operating system and regional settings are the same as the user’s preferred language. Otherwise, there may be problems with the display and functionality of Centra 7 if the operating system does not support the proper fonts.

Creating a New User Account

If necessary, you can register by creating your own Centra 7 user account.

To register:
1. Launch your browser.
2. In the browser **Address** or **Location** field, enter the name of your organization’s Centra Server and press the **Enter** key.
3. Click **Create**.
4. Enter all required information.
5. Select your timezone from the dropdown list.
6. Select your preferred language from the **Language** drop down list.
   The Centra interface and Web pages will appear in the language you select.
7. Enter any optional information, if desired.
8. Click **Create**.
   The My Schedule page appears.

Account Tips
- The Login and Password fields are case sensitive.
- Your System Administrator may require that your password meet certain requirements and be changed on a regular basis.
- Display name is the name that other users will see.
- You can change your user account information in My Profile.
- If your System Administrator has not installed any additional language packs, the Language drop down list will not display.

Logging In

If you are a registered Centra 7 user, log in from the Centra 7 Welcome Page.

To log in to the Centra Server:
1. Launch your browser.
2. In the browser **Address** or **Location** field, enter the name of your organization's Centra Server and press the **Enter** key.
3. Type your user login in the **Login** field.
4. Type your password in the **Password** field.
5. Select **Remember me** if you do not want to enter this information again.
6. Click **Log In**.
   The My Schedule page appears.

### Login Tips

- The Login and Password fields are case sensitive.
- If you do not remember your password, click the **Forget your password** link. Your password will be emailed to you. (This link appears only if email is enabled on your Centra Server.)
- Cookies must be enabled on your browser to use the Remember me feature.

### Enrolling in a Session

You must enroll in a session before it begins, or be invited as a guest attendee. Once enrolled, you can attend the session or view its recording.

**Note:** You may not be allowed to enroll or unenroll yourself from sessions. Not all sessions are listed on the Event List. Check with your Event Manager if you need information on joining a session.

**To enroll in a session:**

1. From the My Schedule page, click **Event List**.
2. In the **Event** column, locate the name of the session you want to enroll in and click **Enroll**. The link changes from Enroll to Enrolled.
   **Note:** If the enrollment for the session is full, contact your Event Manager and request the enrollment limit be raised.
3. Click **My Schedule** to see the name and start time for each session in which you are enrolled. Check the Upcoming and Ongoing tabs.

**To unenroll from a session:**

1. Click **My Schedule**.
2. Locate the name of the session from which you want to unenroll and click **Unenroll**.
   The session no longer appears on your My Schedule page.
Attending a Session and Installing Centra 7

The My Schedule page shows the name and start time for all the sessions in which you are enrolled. When you attend a session, Centra 7 checks that the Centra client is installed on your computer. If the client is not installed, you will be prompted to install it.

To attend a session:

1. Click My Schedule and locate the name of the session you want to attend.
2. If you see Download, click the link (Symposium and Conference only) to download content. Select Automatic Download and click Proceed.

   A popup window indicates that a download is in progress. The amount of time this download takes depends on your connection speed and the amount of content to be downloaded.
3. Click Attend to enter that session.

   Centra 7 checks to make sure the client is installed. If the client:
   - IS installed, the Symposium, Conference, or eMeeting interface appears.
   - Is NOT installed, you receive a prompt to download the client. If you are using Internet Explorer, the client is automatically installed. If you are using Netscape, accept the Netscape plugin (if necessary) and then the client is automatically installed.

   Click Yes in the Security dialog box, if necessary. When done, the Symposium, Conference, or eMeeting interface appears.

   Note: If you cannot access the session, contact your System Administrator.

To attend from an Email invitation:

1. Click the link in your Email message.
2. Type in your Email address and click Attend. Or, type in your Login and Password.
3. If you are guest user (non-registered user), enter a First name, Last name, Display name, and Email address.
4. Click Attend.

   The Symposium, Conference, or eMeeting interface appears.
EDITING YOUR PROFILE

You can change your user account information for Centra 7 by editing your Profile.

Note: You cannot change your login.

To edit your user profile:
1. Log in to the Centra Server.
2. Click My Profile on the My Schedule page.
3. Edit all fields that require new information.
4. Click Submit to update your account.

The My Schedule page appears.

CREATING A MEETING

A meeting is a quick way to collaborate with a group of people. By default, any user can schedule a meeting. The individual who creates the meeting is automatically the Leader and controls who is invited.

You cannot attach a Subject and Agenda to a meeting; you can only import content while in session. The meeting does not appear on the public Event List unless you specify that it appear.

Note: To create a Symposium or Conference session, you must have Event Manager privileges.

SCHEDULING A MEETING

1. Click Create Meeting on the My Schedule page.
2. Type the name of the meeting in the Topic field.
3. Select the Day and Time from the calendar picker. Today’s date is shown by default. Select a timezone, if necessary.
4. Select a Duration:
   □ Select specific hours from the drop down lists if you want the meeting to occur at a specific time. (You can select 15 minute increments.)
   □ Select Ongoing if you want the meeting to be available all the time.
5. To start your meeting immediately and not set any more options, click Start Now. Otherwise, continue with the rest of this procedure.
6. Select a Cost Center, if necessary.
7. Select the number of people who can attend from the Seats Reserved list.
8. Select the Server from the drop down list, if necessary.
9. Select the desired meeting options:
   □ Post to public Event List (so other users can self-enroll)
• Enable video
• Record meeting
• Allow users to attend without an invitation (checked by default). This allows guest users to attend.

10. To password-protect the meeting, enter (and re-enter) a meeting password.
11. Select the appropriate Audio Option: Voice Over Internet, or Telephone.
12. If email is enabled on your Centra Server, update the Subject for the email message and type the message in the text box to create an Email Invitation.
13. Type the Email Address of each Participant in the Attendees area.
14. Click Create.

The meeting now appears on your My Schedule page. You are automatically the Leader of the session.

Meeting Tips

• You can enter up to 60 characters for the name of the meeting.
• Click Check Capacity to verify how many seats are available. Your Event Manager sets the Capacity Limit.
• You can enter up to 50 characters for the password.
• If email is enabled on your Centra Server, de-select the Send Email Invitation checkbox if you do not want the attendee to receive an email invitation.
• Click Preview to check the message before you send it.
• You can invite Guests to a meeting. See “Guest Attend” for more information.

Centra Connectivity Tips

If you encounter trouble when accessing your Centra Server or attending a session, check the following:

If you receive “A page not found” error:

• Make sure you have the correct URL address and that you typed the address correctly. Confirm the URL with your System Administrator.
• If you can access the Centra 7 Welcome page but you cannot log in:
  • Make sure that you are typing your login and password correctly. These fields are case sensitive. Verify that you have a Centra user account.

If you can access your My Schedule page but you cannot find the session you want to attend:

• Click the Past tab. Check to see if the session has already occurred.

If you click on the Attend link, but the Centra client does not launch:
A “login ID already in use” message indicates you are already attending the session on another PC, using the same login as another user, have another version of the client open, or clicked the Attend link more than once.

To install the Centra 7 client:

1. Click the install Centra 7 link in the Centra 7 Setup window.
2. Click Open or Save. Then follow the onscreen directions to install the client.
3. When the installation is complete, click launch Centra 7 in the Centra 7 Setup window.

If you have already installed the Centra 7 client but are still seeing this window, do one of the following:

- If you have already gone through this process on one server but are now attending a session on a different server, click launch Centra 7 in the Centra 7 Setup window. The installation is recognized on a server by server basis.
- If you already have the client installed, click launch Centra 7. If you are prompted to download or save this file, the client has not been installed. Click Cancel and click the Attend link again. Enter the following in the Address or Location field of your browser:

  http://servername/main/Install/setupj.jhtml

  Where servername is the name of the server that you are attending on

  Click Open or Save. Then follow the onscreen directions to install the client.

- If you have cookies disabled in the browser, you will be asked to install the Centra 7 client each time that you attend a session. Enable cookies in your browser to avoid going through this process each time. See your System Administrator if you need assistance.

If you are having trouble connecting to the session or Centra Server:

Close all other applications on your computer and reboot your machine.

If you are still having problems:

Contact your System Administrator or Centra Technical Support.

Adding Content for an Event to the Catalog

As the Leader of an event, you can provide materials for your participants through the Content Catalog. The content may reside on your computer or already in the Content Catalog. The content may be available only to users enrolled in the event or to anyone with access to the Centra 7 domain.

Content you can add includes:
To add content for a specific event from your computer:

1. Log in to your My Schedule page.
2. Locate the event you are to lead.
3. Click **Add Files**.
   
   The Add Files page displays.
4. Click **Add New File** to upload a file to the Content Catalog.
   
   The Add New File page displays.
5. Click the Browse button to browse to the content you want to add or enter the link to the file you want to add.
6. Enter a **Title** for the file.
7. Optionally, enter a description, keywords (to be used for searching purposes), the author’s name and email, a version number, the length of time it would take to complete this material, the language, the category (such as Marketing, Management, Finance, etc. - select from the drop down list)
8. Specify whether this content will be available to anyone browsing the Content Catalog (Public) or available only to those users enrolled in this event (Private).
9. Click **Add File**.
10. When the upload is complete, close the window.

   The link under the event has changed to **View Files**.

To add content for a specific event from the Content Catalog:

1. Log in to your My Schedule page.
2. Locate the event you are to lead.
3. Click **Add Files**.

   The Add Files page displays.
4. Click **Add from Catalog** to browse for a file already in the Content Catalog. The Add Catalog Content to <Event Name> page displays.

5. Enter a value in the Search for field and select the type of content to search for. Click the Exact Phrase checkbox to search for an exact match to the text you entered.

6. Click **Search**.
   The results matching your search criteria display.
   You can
   - Change the number of items displayed on each page by selecting 10 | 25 | 50 per page next to **Show**.
   - Click on Previous or Next to move to the previous or next page of items matching your selection criteria.
   - Clear the search by clicking **Clear Search**.
   - Move to titles beginning with a certain letter by selecting that letter from the list.

7. Click the checkbox to the left of the item(s) you want to associate with the event.
   - Click on **Items Selected** to see only the items you have selected. This does not add the selected items; it only allows you to view them more easily from a larger list.
   - Click **Clear** to clear the checkmarks from the selected items.

8. Click **Add Selected**.
   The item(s) are added to the list for the event.

**Viewing Content for an Event in the Catalog**

To view content for a specific event in the Content Catalog:
1. Locate the event on the My Schedule page.
2. Click **View Files**.
   The View Files: <Event Name> page displays.
3. Locate the file you want to view and click **View**.
   The file displays.

**Removing Content for an Event from the Catalog**

To remove content for a specific event in the Content Catalog:
1. Locate the event on the My Schedule page.
2. Click **View Files**.
   The View Files: <Event Name> page displays.
3. Locate the file you want to view and click **Remove**.

A window displays indicating where this file is currently being used. You can choose to remove the file from only this event or from the Content Catalog itself.
Chapter 3
Agenda Builder

For a Symposium and Conference session, use Centra Agenda Builder to assemble, sequence, and package content into an Agenda.

To use an Agenda in a session, follow these steps:

1. Create an Agenda.
2. Add a Subject.
3. Add an Agenda to a Subject.
4. Add the Subject to a session.

Note: You must have appropriate privileges to use Agenda Builder and create Subjects.

About Agenda Builder

Agenda Builder functions as a stand-alone application and allows you to sequence content to be used in a session. Internet access is not required.
Opening Agenda Builder

You must download the Agenda Builder application from the Centra Server before using it for the first time. Once Agenda Builder is downloaded from the Centra Server, you can access it without connecting to the server.

To open Agenda Builder:
1. Log into your Centra Server with appropriate privileges.
2. Click Agenda Builder.
   Agenda Builder opens.

To access Agenda Builder directly from your computer, click the Windows Start button on your computer and select Programs, Centra, Centra Agenda Builder.

Creating an Agenda

Use Agenda Builder to insert text, graphics, PowerPoint, audio, video, multimedia files, and other files into an Agenda.

To insert a file into an Agenda:
1. In Agenda Builder, select Insert, File.
2. Select a file to insert and click Open.
   For PowerPoint presentations, the Image Format dialog box appears. For all other file types, the Edit Item Properties dialog box appears.
3. For a PowerPoint presentation, select a file type and click OK.
   - GIF for slides with simple graphics and text.
   - JPG for slides with complex graphics and photographs.
   - HTML for PowerPoint animation or to have the ability to resize the slide. This file will be large.
   PowerPoint launches. The file opens and each PowerPoint slide is imported into the Agenda as an Agenda item. The title of each slide is assigned to the Agenda item. For PowerPoint presentations, the procedure is complete. You can add additional items or save the Agenda.
4. For all other file types, click OK in the Edit Item Properties dialog box to import files using the default settings. Or change settings.
5. To change the settings, enter the following:
   - Enter a name for the Agenda item in the Title field. The file name appears as the default.
   - Click to deselect Available out of session if the Agenda item should only be available to Participants in session.
   - If the file contains audio, optionally select Contains Audio to disable microphones while the file is viewed within the Media Window.
If inserting HTML or multimedia files, optionally select **Use System Browser** or **Launch External Window** to have the content appear in a separate window.

For **Content files stored on**, select:

- **Server Side** if the file size is small enough to load from the server when the Leader presents the Agenda item during the session for non-multimedia content. Use this setting if the content is smaller than 50k.

- **Client Side** if the file is too large to send from the server during the session. Use this setting if file is larger than 50K. Participants must download content to their computers before the session.

If inserting HTML or multimedia files, click **Add** to load additional supporting files or **Remove** to delete files.

If inserting a multimedia file, enter the **Width** and **Height** of the video image to change the default settings.

6. Click **OK**.

You can then add additional items or save the Agenda.

**Tips for Creating an Agenda**

- Do not use files with names that include: \ / : * ? " < > # | % _ ; ! $ &.
- An Agenda name can contain up to 255 characters, including spaces.
- Only supported file types appear in the Select a File dialog box. To add unsupported file types, replace the File name field with *.*. Then locate the file.
- The options shown on the **Edit Item Properties** box vary, depending on the type of file imported.
- By selecting Contains Audio, you disable the microphones whether or not the file contains audio. Unless the file actually contains audio, do not select Contains Audio.
- Any items you import into an Agenda are inserted in the Agenda hierarchy directly after the currently selected item.
- You can drag and drop Agenda items to move them around.
- To use an .mpeg file, change the .mpeg extension to .mpg before inserting into Agenda.
- Avoid complex backgrounds in your PowerPoint slides to keep the file size small. Use one color as the background.
- Keep your Agenda to fewer than 500 items.
- You can open up two Agenda Builder windows, and copy Agenda items from one Agenda and paste into the other Agenda.
Language Considerations for Agendas

- In order to update an Agenda (.saz file), your computer must have the same regional settings as the computer used to create the Agenda.
- If you want to upload an Agenda created with a prior version of Agenda Builder to the Centra Server (and you previously had not uploaded it), you must open and save the .saz file using Agenda Builder 7.0 before uploading.

Supported Content

The following list details the various file types supported in an Agenda and conditions for their use. These files appear in the Media Window unless otherwise noted.

Text and Graphics

- Supported file extensions are .txt, .htm, .html, .gif, .jpg, .jpeg
- HTML files that display in an HTML browser. HTML files can include JavaScript and embedded content such as images and Flash files (.swf). Users need the appropriate plugins (such as Flash, Shockwave, etc.) to see the content.
- Word, (.doc), Acrobat (.pdf), and Excel (.xls) files are supported, but the event participants must have the application on their computer to view the content. When these file types are used in an agenda, the appropriate application opens in a new window.
- Total file size should be less than 10MB.

PowerPoint

- Supported file extension is .ppt
- Must have PowerPoint 97 or higher
- Total file size should be less than 10MB
- Avoid using complex backgrounds
- Slides can be imported as .gif, .jpg or HTML files

Note: Not all PowerPoint 2000 animation features are supported when slides are imported as HTML into an Agenda. No Animation properties are supported for PowerPoint 2002 and XP. You can import PowerPoint 2002 slides as .jpg or .gif only.

Centra Content

- Placeholders for Centra tools, Whiteboard, Web Safari, and Appshare
- Existing Centra Symposium or Conference Agenda created with Agenda Builder
Audio and Video

- Pre-recorded audio or video including those made with Centra Knowledge Object Studio (CKOS).
- Supported file types and extensions are AVI (.avi), SUN (.au), QUICKTIME (.mov), MPEG 1 (.mpg), MPEG (.mp2), REAL (.ra, .rm), WAV (.wav), and Windows Media (.wmv, .asx).
- Some formats may require a media player application or browser plugin such as Active Movie, DirectX Media Runtime, Quicktime, Real Player, or Windows Media Player.
- Participants must have Real Player version 8.0 or higher installed to view Real Networks media files (.ra, .rm).
- Participants must have Windows Media Player installed on their computer to view Windows Media files (.asx).

Other Content

- URL (Uniform Resource Locator), link to a Web site
- Microsoft LRN 3.0
- Content stored in the Content Catalog or in the Centra Knowledge Center.

Creating an Evaluation

An Agenda Builder can create an Evaluation to measure the level of learning, get feedback on a Symposium or Conference session, and solicit Participant input. The Leader can view the results of the Evaluation during the session. The Evaluation can be saved, graded (Symposium only), and made available outside the session.

To insert an Evaluation:

1. In Agenda Builder, select Insert, Evaluation.
2. Type a name for the Evaluation in the Title field (up to 80 characters).
3. Select the Available out of session checkbox to allow Participants to take the Evaluation before the session.
4. Select a Recording results option:
   - Record with user’s identity - to store each Participant’s name and results.
   - Record anonymously - to store results without the Participant’s name.
   - Do not record - to not store results. Do not use for evaluations containing long answer questions.
5. Select a Grading results option:


- **Grade and display to user** - to grade the submitted Evaluation and automatically display the corrected results to the Participants.

- **Grade and do not display to user** - to grade the submitted Evaluation but not display the corrected results to the Participants.

- **Do not grade** - to collect information from the Evaluation without evaluating for correctness. Use to gather feedback in the form of a questionnaire or for Conference sessions. (Multiple choice questions can have a single correct answer only.)

6. In the **Instructions** field, type the text (or instructions) that will appear at the top of the Evaluation (up to 1024 characters).

7. Click **OK**.

   The Evaluation appears in the Agenda item hierarchy.

### Creating Evaluation Questions

After inserting an Evaluation into an Agenda, create questions. There are three types of questions:

- **Multiple Choice** - Participants choose from one or more possible answers.

- **Fill in the Blank** - Participants type a short text answer to answer the question (up to 40 characters).

- **Long Answer** - Participants type an answer to an essay-type question. You cannot specify a correct answer or grade a Long Answer question (up to 2000 characters).

**To create an Evaluation question:**

1. Select the **Question Type**: Multiple Choice, Fill in the Blank, or Long Answer.
2. Type the question in the **Question Text** field. Use underscores for Fill in the Blank. Example: “A right angle is ___ degrees”

   **Tip:** A Fill in the Blank question can contain only 1 blank.

3. If the question is Multiple Choice or graded Fill in the Blank, type the answers in the **Answers** rows (up to 5).

   **Tip:** Fill in Blank answers are not case sensitive.

4. If the Evaluation is to be graded, select the checkbox next to the correct answer(s).

   **Note:** For graded Evaluations, you must provide at least one correct answer.

5. If the Evaluation is to be graded and displayed to Participants, optionally type a helpful hint in the **Wrong-answer Tip** field.

   This tip appears in the graded Evaluation to the Participants who answered the question incorrectly.

6. Click **Apply**.

   Agenda Builder adds the completed question to the Evaluation. You can then add additional Agenda items or save the Agenda.
Saving an Agenda

When you are done creating your Agenda, save it to a local drive and then later upload it to your Centra Server. The file extension for an Agenda is .saz.

To save an Agenda:
1. Select File, Save or Save As (to save the Agenda under a new name).
2. Select the folder in which to save the Agenda and type in a File Name.
   An Agenda name can contain up to 255 characters, including spaces. Do not use the following characters to name an Agenda: \ / : * ? " < > | % _ ; ! @ $ &
3. Click Save.

Subjects

Subjects allow you to re-use content for multiple Symposium and Conference sessions. A Subject is a “container” that holds an Agenda created in Agenda Builder. First create a Subject and then add the Agenda to the Subject.

Once a Subject is created on the Centra Server, an Event Manager can schedule any number of sessions using the same Subject. Once an Agenda is associated with a Subject, all sessions using the Subject can access the content in the Agenda. An Agenda can be edited or replaced without changing a Subject or rescheduling sessions.

Adding a Subject

First add a Subject before uploading an Agenda to the Centra Server.

To add a Subject:
1. Log in to the Centra Server with appropriate privileges.
2. Click Manage Subjects.
3. Click Add a Subject.
4. In the Name field, type a descriptive name for the Subject. (This is the only required field.)
   Note: Do not use the following characters in a Subject name: # “ \ / : * ? < > | ;
5. In the Contact field, type the name of the person to contact for information related to this Subject. You can also add contact information such as a phone number or email address.
6. In the Description field, type a description of the Subject.
7. In the Target Audience field, type a brief description of the intended audience.
8. In the Links field, type any URLs that relate to the Subject’s content.
Enter a URL to a Web site that contains information you want Participants to know before the session. Use the format http://www.website.com. For example, if Participants need a plugin to view your content, direct them to a site where they can download the plugin.

9. Click **Submit**.

The Subject appears on the Manage Subjects page. When creating a Symposium or Conference session, the Event Manager can add the Subject to any session.

**Adding an Agenda to a Subject**

After creating an Agenda and a Subject, the next step is to add the Agenda to the Subject. The Event Manager can schedule sessions using a Subject before an Agenda is uploaded. The Subject does not have content until an Agenda is added.

Once an Agenda is added to the Subject, all sessions using the Subject have access to the content in the Agenda. See “Scheduling a Session” for instructions on adding a Subject to a session.

**To add an Agenda to a Subject:**

1. Log in to the Centra Server with appropriate privileges.
2. Click **Manage Subjects**.
3. Use the search criteria at the top of the page to locate the Subject to associate with an Agenda.
4. Click **Add** under the subject name.
5. Click **Add Agenda** on the Add Agenda page.
6. Click **Browse** to locate an Agenda file in the Add Agenda dialog box.
7. Locate the Agenda file to add and click **Open**.
8. To add a comment in the Agenda history, type the note in the **Comment** box.
9. To lock the Agenda, select **Checkpoint**.
   
   When Checkpoint is selected, no one else can check out a copy of a locked Agenda.
10. Click **Add**.

   An Upload in Progress status bar appears as Centra adds the Agenda.
11. Click **Done** on the Add Agenda page.

After an Agenda is associated with a Subject, the Agenda can still be modified. All sessions using the Subject use the modified content.

**Checking Out an Agenda**

To edit an Agenda that is associated with a Subject, you must check out the Agenda. Once edits are complete, you must check back in the Agenda.
An Agenda must be *unlocked* to be checked out. The Manage Subjects page shows whether the Agenda is unlocked or locked. When a user checks out an Agenda, the status changes to locked. Only one person can check out an Agenda at a time.

**To check out an Agenda:**

1. Log in to the Centra Server.
2. Click **Manage Subjects**.
3. Locate the Subject with the desired Agenda.
4. Click **Check Out** under the subject name.
5. Click **OK**. Click **Cancel** to cancel the checkout.
6. Click **Check Out Agenda**.
7. Accept the default path or type a new path to a local directory.
8. Click **OK**.
9. Click **Done**.

The Centra Server saves a copy of the Agenda in the location you specified. The Manage Subjects page reappears. The .saz file now takes on the name of the Subject. Open the .saz file in Agenda Builder to edit the Agenda.

---

### Checking In an Agenda

Check in an Agenda that has been checked out and edited, or check in a new Agenda to replace one already associated with a Subject. *To check in an Agenda, you must be the individual that checked out the Agenda.*

**Note:** You cannot check in an Agenda to a Subject that is currently being used for an active session. When the session ends, you can check in the Agenda.

**To check in an Agenda:**

1. Log in to the Centra Server.
2. Click **Manage Subjects**.
3. Locate the Subject to which you want to check in an Agenda.
4. In the Agenda column, click **Check In**.
5. Click **OK** to proceed with the checkin and delete any recordings associated with the Agenda. Click **Cancel** to cancel the checkin.
6. On the Check In Agenda page, click **Check In Agenda**.
7. To locate an Agenda file, click **Browse**.
8. Locate the Agenda file to check in and click **Open**.
9. To add a comment in the Agenda history, type a note in the **Comment** box.
10. Select **Checkpoint** to lock the Agenda.

No one else can check out a copy of a locked Agenda. The Manage Subjects page indicates the Agenda is locked.
11. Click **Checkin**.
   An Upload in Progress status bar appears as Centra checks in the Agenda.
12. Click **Done**. The Manage Subjects page reappears.
   The Agenda is now unlocked and the Check Out link appears.
Interface Components

The Symposium, Conference, and eMeeting Centra interfaces (Participant and Leader) contain the following components.
Title Bar

The Title bar appears at the top of the Centra interface. During a Symposium Breakout Session, the Title bar updates to show the number of the Breakout Room. Standard Windows buttons appear at the right end of the Title bar. Use these buttons to minimize, maximize, or close the Centra interface.
Participant Menu Bar

The Participant Menu bar contains the following default options:

- **File** - to print or exit a session.
- **View** - to change the look of your Participant interface.
- **Actions** - to raise your hand and say yes or no. Additionally, in Symposium and eMeeting, to indicate laughter and applause, and to step out.
- **Tools** - to use text chat, set the Centra Audio Wizard and Video Wizard, and view conference call info. Additionally, in Symposium and eMeeting, to host an application, send feedback, or change the view options.
- **Help** - to find out about this session and Centra 7, and to view online Help.

Leader Menu Bar

The Leader Menu Bar contains the following default options:

- **File** - to print content or exit a session.
- **View** - to change the look of your Leader interface or Participants’ interfaces.
- **Insert** - to include a PowerPoint presentation, a URL (Symposium and eMeeting only), a File to Download, or an existing Agenda in the Agenda.
- **Actions** - to raise your hand, say yes or no, step out and return, begin/end the session (Symposium only), clear yes/no responses, clear microphones, lower hands, and show/hide attendance (Conference only). Additionally in Symposium and eMeeting, indicate laughter and applause, and grant microphones to all.
- **Tools** - to use the Centra tools (Survey, Web Safari, and Appshare), use text chat and set text options, create Breakout rooms (Symposium only), enter conference call information, invite by email or Instant Messenger, change voice options, change the Appshare options, or run the Centra Audio or Video Wizard. Additionally in Symposium and eMeeting, collect feedback, use the Whiteboard, and change the view options.
- **Help** - to find out about this session and Centra, and view online Help.

**Note:** The Record, Markup, Video and Go (Symposium only) menus appear when these features are enabled.

Audio Area

The Audio area indicates microphone or speaker activity. Yellow bars indicate you are sending or receiving audio. Adjust the sliders to control the microphone and speaker levels.

Use the **Talk** button or the **Ctrl** key to speak during a session. Click **Lock to Talk** to speak 'hands free' for an extended time. Click again when done to allow others to speak.
Video Panel

The Video panel opens when video services are launched. The broadcaster appears in the panel.

Presenters Area

The Presenters area lists the Leader and Co-Presenters for the session. The Leader’s name appears first and is followed by any Co-Presenters.

Participants List

The Participants List shows the Participants in the session.

In Symposium and eMeeting, click the associated icon above the list of names to sort the Participant List by microphone, Yes or No responses, raised hands, or Participant names. In a Participant interface, the user’s name appears at the top of the list. To view another Participant's full name, hold the mouse over the Participant's name. A summary area shows the total number of Participants who responded Yes or No, or who raised a hand. It also shows the total number of Participants in the Main Room.

In Conference, the Leader and/or Event Manager determines whether the list of Participants is available. If enabled, click the Show Participant List icon to see the full list of Conference Participants in a new window.

Symposium and eMeeting Leader

Symposium and eMeeting also include an auto-sort feature, which allows the Leader to sort Participants by:

- Ascending order of names (alphabetically)
- Descending order of names (alphabetically)
- Microphone control
- Raised hand
- Yes or No responses

To sort Participants automatically:

1. In the Centra interface, select Tools, View Options.
2. Click the Auto Sort radio button in the Participant Table area.
3. In the First by drop down menu, select the primary order in which to sort Participants.
4. In the Then by drop down menu, select the secondary order in which to sort Participants (optional).
5. Click OK.
Conference Leader

In Conference, the Participant List shows the Participants with their hands up or with a microphone. The Event Manager or Leader can select whether to show or hide the number of Participants in a session to all users. While in session:

- Select **Actions, Hide Attendance** to remove the Participants List display from Participants. (This changes the display from the total numbers to percentages.)
- Select **Actions, Show Attendance** to show the Participants List display to Participants. (This changes the display from percentages to total numbers.)

**Note:** Leaders can click the **Show Participants List** icon to view the list even when hidden.

Agenda Area

The Agenda area lists the content for the session in the form of an Agenda. Leaders and Co-Presenters use an Agenda during a session as a guide to select and show content and tools.

Status Bar

The Status bar indicates whether the session is in pre-session or session mode, or if the session is being recorded.

Conference and eMeeting sessions are considered “in session” as soon as the Leader enters. In Symposium, the Leader must explicitly begin the session.

Participant Toolbars

The Participant toolbar provides quick access to many Symposium, Conference, and eMeeting functions. The following lists which Toolbar buttons are available in each Centra application.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Application</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="hand.png" alt="Hand Up" /></td>
<td>S C M</td>
<td><strong>Raise your hand</strong> to ask a question. A number appears next to their name to indicate the order in which Participants raised their hands. Click again to lower your hand.</td>
</tr>
<tr>
<td><img src="yes-no.png" alt="Yes/No" /></td>
<td>S C M</td>
<td><strong>Say Yes</strong> (check mark) to answer yes to a question. <strong>Say No</strong> (x mark) to answer no to a question.</td>
</tr>
<tr>
<td><img src="laugh.png" alt="Laughter" /></td>
<td>S M</td>
<td><strong>Indicate Laughter</strong> at any time. A smiley face flashes to the left of your name for five seconds.</td>
</tr>
</tbody>
</table>
**Leader Toolbars**

The Leader interface Toolbar provides quick access to many functions. The following lists which Toolbar buttons are available in each Centra application.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Application</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Hand]</td>
<td>![Microphone]</td>
<td><strong>Give microphone to next raised hand</strong> to allow the Participant to speak. Each time Participants click Raise Your Hand, a number appears next to their name to indicate the order in which they raised their hands.</td>
</tr>
<tr>
<td>![Chat]</td>
<td>![Microphone]</td>
<td>Communicate with others using <strong>Text Chat</strong>.</td>
</tr>
<tr>
<td>![Feedback]</td>
<td>![Microphone]</td>
<td>Show anonymous <strong>Feedback</strong> from Participants regarding the session.</td>
</tr>
<tr>
<td>![Hand]</td>
<td>![Microphone]</td>
<td><strong>Raise your hand</strong> to ask a question. Click again to lower your hand.</td>
</tr>
<tr>
<td>![Yes] ![No]</td>
<td>![Microphone]</td>
<td><strong>Say Yes</strong> (check mark) to answer yes to a question. <strong>Say No</strong> (x mark) to answer no to a question.</td>
</tr>
<tr>
<td>Icon</td>
<td>Application</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td><img src="image1" alt="Icon" /></td>
<td><strong>Display selected Agenda item</strong></td>
<td>to show the item in the Media Window to all.</td>
</tr>
<tr>
<td><img src="image2" alt="Icon" /></td>
<td><strong>Share an application</strong></td>
<td>to show an open application on your computer to all others.</td>
</tr>
<tr>
<td><img src="image3" alt="Icon" /></td>
<td><strong>Conduct a survey</strong></td>
<td>to poll Participants.</td>
</tr>
<tr>
<td><img src="image4" alt="Icon" /></td>
<td><strong>Go on a Web Safari</strong></td>
<td>to share Web sites and active Web site links with Participants.</td>
</tr>
<tr>
<td><img src="image5" alt="Icon" /></td>
<td><strong>Use the Whiteboard</strong></td>
<td>to type text, create simple shapes, or highlight images.</td>
</tr>
<tr>
<td><img src="image6" alt="Icon" /></td>
<td><strong>Create one or more Breakout Rooms.</strong></td>
<td></td>
</tr>
<tr>
<td><img src="image7" alt="Icon" /></td>
<td><strong>Begin session</strong></td>
<td>to take control of the session and start it.</td>
</tr>
<tr>
<td><img src="image8" alt="Icon" /></td>
<td><strong>Show Conference Call Information</strong></td>
<td>during a session.</td>
</tr>
<tr>
<td><img src="image9" alt="Icon" /></td>
<td><strong>If enabled, broadcast video in the session.</strong></td>
<td></td>
</tr>
<tr>
<td><img src="image10" alt="Icon" /></td>
<td><strong>If enabled, pause the Server-Side Recorder.</strong></td>
<td></td>
</tr>
<tr>
<td><img src="image11" alt="Icon" /></td>
<td><strong>If enabled, use the Server-Side Recorder to record the session.</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Media Window**

The Media Window shows the Agenda item or tool (such as Appshare, Web Safari, or Whiteboard) currently being used.
Network Status Indicator

A Network Status Indicator appears in the lower right corner of the Centra Symposium, Conference, and eMeeting interface. Five lights indicate the quality of your network connection:

<table>
<thead>
<tr>
<th>State</th>
<th>Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good connection</td>
<td>4 or 5 green lights with the last one blinking</td>
</tr>
<tr>
<td>Fair connection</td>
<td>2 or 3 yellow lights with the last one blinking</td>
</tr>
<tr>
<td>Poor connection</td>
<td>1 red light</td>
</tr>
<tr>
<td>Disconnected</td>
<td>5 red lights</td>
</tr>
<tr>
<td>Reconnected</td>
<td>5 green lights</td>
</tr>
</tbody>
</table>
A Participant uses Centra 7 to enroll in and attend a Symposium, Conference, or eMeeting session. As a Participant, you can:

- Speak to the Leader and other Participants (with a microphone).
- Raise your hand.
- Respond to questions with a Yes or No answer.
- Use markup tools.
- Communicate with others using Text Chat.
- Play back a recording of a session.
- Use the View menu to change the interface display.
- Broadcast video (Symposium and eMeeting only).
- Interact with or share an application on your computer (Symposium and eMeeting only).
- Browse course content before a session begins (Symposium and Conference only).
- View content in the Content Catalog.
- Participate in a Survey or in an Evaluation (Symposium and Conference only).
- Provide feedback to the Leader (Symposium and eMeeting only).
- Temporarily step out of a session (Symposium and eMeeting only).
- Work in small groups during a Breakout session (Symposium only).

**Participant Tips**

- Make sure you can clearly hear the Leader and others at all times. Run the Centra Audio Wizard if you encounter problems.
- Raise your hand to request a microphone or ask a question.
- Press the **Ctrl** key or **Talk** button to speak for a short time period (unless using Voice Activation).
- Click **Lock to Talk** to speak for an extended time. Click again when done to allow others to speak.
- Remember that running other applications while in session can slow your session.
- If experiencing a technical problem, close the session and then rejoin it.
- Use Private Text Chat to communicate with the Leader if you continue to experience technical problems.
- Click **Step Out** to temporarily leave the session.
- Work with the Tutorial, accessible from the Centra 7 Welcome page and the My Schedule page.
Chapter 6
Leader

A Leader uses the Centra interface to conduct an online, real-time session with Participants. The Leader controls the pace and flow of the session, and determines who has microphone and AppShare control.

Leader Tips

- Become familiar with the session content.
- If working with a Co-Presenter, decide who is doing what.
- Speak clearly and use animation in your voice.
- Use the Lock to Talk button or Voice Activation when speaking for a long time.
- Provide frequent and varied interactions. Vary tool usage.
- Encourage Participant response.
- Give explicit directions to Participants.
- Ask for frequent feedback.
Remember to clear Yes, No, and Raised Hands.

Remind Participants to hold down the Ctrl key or push the Talk button to speak (unless they are using Voice Activation).

Remind Participants that running other applications while in session can slow their session.

If a Participant is experiencing a technical problem, suggest closing the session and then rejoining it.

Ask Participants to use Private Text Chat if they continue to experience technical problems.

Remind Participants to click Step Out to temporarily leave the session.

To eject a Participant from a session, right-click on the Participant’s name in the Participants List and select Eject Participant from the event.

To adjust a Participant’s audio, right-click the Participant’s name and select Adjust Participant Audio.

Keep total session duration from one to one and a half hours, if possible.

Practice!

Before Beginning a Session

Find a comfortable, quiet place to deliver the session.

Set up the area with a script, notes, water, and a clock.

Launch any applications to share.

Create surveys.

Check Web site URLs you plan to launch in Web Safari.

Import slides, files to download, or agendas, as necessary.

Run the Centra 7 Audio Wizard (and Video Wizard, if applicable).

Speak briefly with each Participant. Make sure Participants can hear you and each other clearly.

Inviting Additional Participants

You can invite additional participants through:

- email
- MSN Messenger/MS Windows Messenger

To invite another person through email:

1. Select Tools, Invite by email.

2. In the Invite by Email dialog box, enter the email address and any additional message you want. Modify the subject if necessary.

3. Click OK.
The person receiving the email can attend by clicking the link inside the message.

**Note:** Email must be enabled.

**To invite another person through MSN Messenger or MS Windows Messenger:**

1. Select **Tools, Invite by IM**
2. Select the name from the IM list.
3. Modify the message if necessary
   - The person receiving the message can attend by clicking the link inside the message.

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**Importing a PowerPoint Presentation**

You can insert a Microsoft PowerPoint presentation into an Agenda before or during a session.

**To import a PowerPoint presentation into a session:**

1. Click the **Import** button located above the Agenda. Or select **Insert, PowerPoint Presentation**.
2. Click **Choose a PowerPoint file to import**.
3. Locate the PowerPoint file to import and click **Open**.
4. Select the import format:
   - **GIF** for slides with simple graphics and text.
   - **JPG** for slides with complex graphics and photographs.
   - **HTML** for PowerPoint animation or to have the ability to resize the slide. File size will be large.
5. Select **OK**.
   - Each PowerPoint slide is imported into the Agenda. The imported slides appear in the Agenda area of the Import Tool dialog box and Import Completed appears when done.
6. Click **Close** to close the Import Tool dialog box.

**Import Tips**

- Make sure Microsoft PowerPoint 97 or higher is installed on your computer or you can access PowerPoint through your organization’s network.
- Cannot import an animated Microsoft XP PowerPoint presentation.
- The PowerPoint presentation should be smaller than 10MB.
- Can import multiple presentations.
Participants do not need PowerPoint to view the presentation.

Inserting a URL

You can insert a URL into the Agenda of a Symposium or eMeeting session.

To insert a URL into an Agenda:
1. Select Insert, URL.
   The Insert URL Tool dialog box appears
2. Type a Title for the URL (required).
3. Select the Available out of session checkbox (default) to make the Web page available to Participants before or after the session.
4. Select the Contains Audio checkbox if the Web page contains audio and you want speaking disabled when the Agenda item is selected.
5. Select the Use System Browser checkbox if you want to open a separate browser window on each Participant’s computer for the URL.
6. Enter the URL for the Web page in the Enter a URL location text box.
7. Click OK.

Inserting an Agenda

You can insert an Agenda built in Agenda Builder into an ongoing event.

To insert an Agenda:
1. Select Insert, Agenda.
   The Select a File dialog box opens.
2. Locate the Agenda and click Open.
   The Agenda you selected will be uploaded to the server and the Agenda items will appear in the listing in the lower left corner of the interface.

Inserting a File to Download

You can insert a file to download to Participant’s machines before or during a session.

To insert a file to download:
1. Select Insert, File to Download.
   The Select a File window opens.
2. Browse to the file’s storage location and select the file to insert.
3. Click Open.
   The name of the file to download displays in the agenda.
When the Leader clicks on the item in the Agenda, a page displays in the media window instructing the Participants how to either display the content in the media window or download the content to their machines.

**Showing Content in Session**

Use an Agenda during a session as a guide to select and show content and tools. You can navigate, or step through Agenda items to launch tools or show files.

To display Agenda items, keep these tips in mind:

- Click on an Agenda item to view the item in your Media Window. The item also appears in each Participant’s Media Window (if in session).
- After selecting an item, a check mark appears over the selected item’s Agenda icon.
- To see the full title of an Agenda item, roll your mouse over the Agenda item.
- In pre-session mode in Symposium and Conference, Agenda items that are not available out of session appear grayed out.
- If you imported content as the HTML format, resizing the Media Window resizes the slides to fit the window.
- If Participants do not have Internet Explorer on their computers, they will not see PowerPoint animations. Instead, they will see a static gif of the last transition slide.

**Navigating the Agenda**

- Click on any item to select it.
- Expand or collapse the folders in the Agenda by clicking on the boxed + or - icon.
- Use the Next and Previous buttons in the Agenda area to step through Agenda items in order.
  
  **Tip:** For slides containing animation, use the Next button to step through the number of animations involved within the slide.

**Deleting Imported Content**

Only session Leaders can delete individual slides or an entire PowerPoint presentation from an Agenda that they imported into a session. Also, you can use these procedures to delete an inserted URL, a saved Whiteboard or slide item, a file to download, or an item in an inserted agenda.

To delete a slide or individual piece of content or a PowerPoint Presentation imported during the session:
1. Click the **Import** button located above the Agenda. Or, select **Insert, PowerPoint Presentation**.
2. Highlight the item or PowerPoint Presentation to remove.
3. Click **Delete Item** to remove the item from the Agenda.
4. Click **Yes** to delete. The Import Tool dialog box reflects the change.
5. When done, click **Close** to close the Import Tool box. The Agenda panel reflects the changes.

### Using Web Safari

Web Safari lets Leaders or Co-Presenters share and display Web sites and active Web site links during a session.

- In a Symposium, eMeeting, or a Breakout session, Participants must have Appshare privileges to interact with Web Safari.
- In a Conference session, Participants cannot interact with Web Safari.

#### To use Web Safari:

1. Click the **Web Safari** button on the toolbar or select **Tools, Web Safari**.
   
   If a Web Safari placeholder is included in the Agenda (Symposium or Conference only), click the Web Safari Agenda item.

   After a few moments, a new instance of the default Web browser launches and the Web Safari Welcome page appears in the upper left corner of the screen. The Centra interface changes to Application Host View. You can continue to work with the Leader interface while viewing Web sites.

2. Use the Web Safari browser to select, show, and browse Web sites.
   
   **Tip:** When controlling the browser through Web Safari, press Lock to Talk or use Voice Activation to speak, not the Ctrl key.

   If another window appears in the browser, a message appears asking if you want to share the window. Click **Yes** to share.

3. Use the Appshare markup tools to point to items in the window. See “Marking up an Application” for more information.
4. Give a Participant Appshare privileges and have the Participant work with the Web site (Symposium and eMeeting only) or show another site. Right-click on the Participant’s name in the Participant List, and select either **Give Participant Appshare privilege** or **Grant microphone and markup tools**.

5. Click on a different Agenda item or choose another tool to stop Web Safari.

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**Using Appshare**

Appshare (application sharing) allows you to open an application on your computer and share it with everyone in a session. The application appears in the Participant’s Media Window.

In Symposium and eMeeting, Participants with Appshare privileges can share and interact with applications. They do not need to have the application on their computer to interact. The Leader can prompt a Participant to share an application.

In Conference, the Leader or Co-Presenter can show and interact with applications. Participants can view the application, but cannot share or interact with the application.

**To share an application:**

1. Launch the application to share.

2. Click the **Appshare** button on the toolbar or select **Tools, Share Application**. In Symposium and Conference, you can include an Appshare tool in an Agenda using Agenda Builder. Click the Appshare item in the Agenda.

3. Check the boxes for the application(s) to share and click **OK**.
   
   The application locates to the upper left area of the monitor and the Centra interface changes to Application Host View. Participants view the application in their Media Window.

4. Interact with the application.
   
   **Tip:** When hosting Appshare, press Lock to Talk or use Voice Activation to speak, not the Ctrl key.
   
   If another window appears in the browser, a message appears asking if you want to share the window. Click **Yes** to share.

5. Use the Appshare markup tools to highlight an area of the application. See “Marking up an Application” for information.

6. Give a Participant Appshare privileges and have the Participant work with the application (in Symposium and eMeeting only). Right-click on the Participant’s name in the Participant List, and select either **Give Participant Appshare privilege** or **Grant microphone and markup tools**.

7. Click on a different Agenda item or toolbar button/menu bar item to stop Appshare.
Marking up an Application

Use the Appshare markup tools to highlight areas of the application you are sharing and change Appshare settings. (This feature also applies to Web Safari.)

**To mark up an application:**

2. Click the down arrow and select **Markup Mode**. The cursor changes to a pencil icon in the shared application.
3. Use the pencil to highlight an area of the application.
   
   **Note:** Do not open another application on top of the shared application; your markup disappears.
4. Make changes using the Appshare tools menu options:
   - Select **Choose Color** to pick another color. The Color dialog box appears. Select the desired color and click **OK**.
   - Select **Clear Markup** to clear the markup from the screen. (You cannot undo.)
5. If desired, select **Pause Application Sharing** to make changes to the shared application without letting the others in the session see them. The menu changes to **Paused**. Interact or markup the application. Select **Resume Application Sharing** to let all others see your changes.
   
   **Note:** Only the individual hosting the application can resume Appshare after it is paused. Do not pause Appshare if you are not hosting.
6. If desired, select **Snapshot** to take a snapshot of the application and save it to the agenda. You will be prompted for a name for the saved item.
7. Select **Exit Markup Mode** when done.
   
   Your markup disappears. You can interact with the application again.

Appshare Control Options

Appshare Control Options include:

- Separating microphone and Appshare control
- Specifying Appshare settings including colors to be transmitted and the refresh rate

**To set Appshare control options:**

1. Select **Tools, Appshare Options**.
2. Select one of the following:
   - **Microphone also allows Appshare control** - to allow you to give both Appshare control and a microphone when granting microphone control.
Microphone does not allow Appshare control - to allow you to separate AppShare control and microphones (default). That is, grant them independently.

3. Specify the number of colors to be transmitted using the list under Colors. True color requires a higher bandwidth. Appshare with 256 colors means that applications may appear slightly different.

4. Specify the Refresh Rate by using the slides under Refresh Rate. A fast refresh rate requires higher bandwidth.

5. Click OK.

Using the Whiteboard

The Whiteboard lets you collaborate on a project while in a Symposium or eMeeting session.

To select the Whiteboard, click the Whiteboard icon on the toolbar. Or, select Tools, Whiteboard.

The Whiteboard appears in the Leader’s and Participant’s Media Window. The Markup toolbar appears above the Whiteboard. Use the markup tools to enter text, draw lines, highlight images, create simple shapes, load a background image, or draw.

Participants must have microphone control to use the Whiteboard. As the Leader or Participants work with the Whiteboard tools, the content of the Whiteboard is visible in everyone’s Media Window.

Saving the Markup to the Agenda

To save the Whiteboard or marked-up slide display to the Agenda:

1. Click the Snapshot to Agenda button on the Markup toolbar.
2. Type a name for the display in the Name field.
3. Click OK to save or Cancel to cancel the operation.
   The saved display appears at the bottom of the Agenda.

Clearing the Markup

To clear the Whiteboard or marked up slide:

- Click the Clear Whiteboard button on the Markup toolbar.
- Select Markup, Clear Markup.
If you added shapes to the Whiteboard or marked up a slide, the markup disappears. If you have a background image with or without shapes, the Confirm dialog box opens.

To clear markup:
1. Select:
   - Background to clear the background image from the Whiteboard.
   - Shapes to clear all shapes from the Whiteboard.
   - Both to clear background images and all shapes from the Whiteboard.
2. Click OK.

If multiple people are working, this button erases everyone’s work.

Tip: To restore the markups, select Markup, Undo Last Clear.

Creating a Survey

The Survey tool allows the Leader, Co-Presenter, or Breakout Leader (Symposium only), to give a quick, one-question-at-a-time poll to Participants during a session. Create a survey before or after beginning a session. Surveys must have a question and at least one answer.

To create a new survey while in session:

1. Click the Survey button on the Leader toolbar. Or, select Tools, Survey.
2. Click New Survey.
3. Type the Survey question in the Question text box.
4. Enter possible answers in the Answer text boxes.
5. Click OK.
6. Click Show Survey to show the survey to Participants.
    
    The Survey appears in each Participant’s Media Window.
    
    As each Participant responds, your Media Window updates to reflect the responses.
7. Select Show results to Participants so Participants can view Survey results.
8. To create another Survey question or edit an existing one, click Open Survey Tool at the bottom of the Survey.

9. Click the Agenda button to return to your presentation.

You can create multiple Surveys and use them throughout the session. After creating one or more Surveys, open the Survey window, select a Survey, and click Show Survey.
Displaying an Evaluation

An Evaluation is a collection of questions Participants answer on their own. Use Centra Agenda Builder to create and insert an Evaluation into an Agenda. See “Creating an Evaluation” for information on creating an Evaluation.

**To display an Evaluation in a session:**

1. Click on the Evaluation item in the Agenda area.
2. Ask Participants to answer the questions and click **Submit** when done.
3. In the Evaluation, click **Update** to view incoming Evaluation results.

   The results show the number of Participants who chose a specific answer. After submitting an Evaluation, Participants cannot change their responses.

Using Breakout Rooms

A Breakout Room is a virtual 'room', separate from the Main Room where a group of Participants and a Breakout Leader work together. Breakout Rooms are available in Symposium only.

Creating Breakout Rooms

You can create a Breakout Room before or during a session.

**To create and configure Breakout Rooms:**

1. Click on the Breakout icon on the toolbar. Or, select **Tools, Breakout Rooms**.
2. In the **Create rooms** area, select one of the following:
   - **Number of Breakout Rooms**. Use the arrow keys to select the number of rooms to create. Pick a number greater than 1.
   - **Minimum number of Participants per Room**. Use the arrow keys to select the minimum number of Participants per room.
3. To manually assign members to Breakout Rooms, clear the **Auto-assign Participants to Rooms** checkbox.
   
   The Auto-assign Participants to Rooms option randomly assigns Breakout members to each Breakout Room. Co-Presenters remain in the Main Room. Manually move Co-Presenters into Breakout Rooms if you want them to participate.

   **Note:** You can move users into a Breakout Room and from room to room at any time during the Breakout session.

4. Click **OK**.
The Participants appear under the assigned Breakout Room folders. If you deselected the **Auto-assign Participants to Rooms** checkbox, all Participants appear under the Main Room folder.

5. Review the Breakout session configuration for:
   - Appropriate number of rooms.
   - Minimum number of Participants per room.
   - Appropriate role assignment.

6. To change the Breakout session configuration, click **Reconfigure** to re-display the Breakout Tool dialog box.

### Moving a Participant to a Room

Once you create Breakout Rooms, you can move a Participant to a specific Breakout Room or to the Main Room, before or during a Breakout session.

**To move a Participant:**

1. In the Breakout Tool window, select the name of the Participant.
2. Right-mouse click and select **Move Participant To**.
3. Select the room from the pop-up menu. The Participant moves to the room you selected.

### Selecting Breakout Room Content

You can select specific content for a Breakout Room before starting the Breakout session or during a session. By default, each Breakout Room sees the entire Agenda as its content.

**To select Breakout Room content:**

1. In the Breakout Tool window, right-mouse click on the name of a Breakout Room.
2. Choose **Select content**.
3. Select an Agenda item. You can select a specific Agenda Item or a folder. If you select a folder, all items within that folder will be available to the Breakout Room.
4. Select **Apply to all breakout rooms** if you want to apply the content selection to all Breakout Rooms.
5. Click **OK**.
   
The selected content appears as a book icon within the Breakout Room.
Changing Breakout Roles

You can assign a new Breakout Room Leader before or during a Breakout session.

**To assign a new Breakout Room Leader:**

1. Select the user in the Breakout Tool window.
2. Right-mouse click and select **Make Participant room Leader** from the popup menu.

Because a Breakout Room can have only one Breakout Leader, the previous Leader automatically changes to a Breakout Participant.

Starting and Stopping Breakouts

In the Breakout Tool window, click **Start** to begin the Breakout session.

**To end the Breakout session:**

1. From the Breakout Tool window, click **Stop**.
   The Breakout Leader and Participants return to the Main Room.
2. Click the **Close** button in the upper right corner of the Breakout Tool window.
Chapter 7
Event Manager

An Event Manager creates Symposium and Conference sessions, and then enrolls users in a session.

Creating a New User Account

A Centra 7 user must have a Centra user account to log in to the Centra Server, and to lead or participate in a session. Users can create their own accounts or Event Managers can create the accounts.

Before creating a user account, an Event Manager should:

- Have the user’s account information available.
- Ensure that your organization has available licenses.
- Know what role to assign the new user.

Tip: You can always edit the account later, if necessary.

Do NOT use these characters in the user’s login, first, middle, or last name: * (asterisk), % (percent), + (plus), " (quote), or , (comma). The Centra Server will strip out these characters.
To create a new user account:

1. Log into the Centra Server as an Event Manager.
2. Click Manage Users.
3. Click Add User.
4. Enter all required information.
5. In the Timezone field, select the time zone the user will use.
6. In the Meeting Capacity field, type the numbers of attendees the user can have in a meeting.
7. Select a Language for the user.
8. Optionally enter Phone, Employee ID, and Title. (The Centra interface and Web pages will appear in the language you select for the user.)
9. In the Teleconference Information area, enter information about the user’s teleconference service, if applicable.
10. In the Group area, select the group(s) you want to assign to the user. Some of these groups incorporate Centra privileges. Coordinate with the System Administrator.
11. Click Add.

The Centra Server creates and stores the user account in the Centra database.

Account Tips

- Duplicate logins in the Centra database are not allowed. You are notified of any user Login name conflict when you attempt to add the user. A duplicate login name is spelled the same as an existing name, whether or not it is capitalized differently.
- Passwords are case-sensitive. Additionally, your Centra System Administrator can enforce restrictions on the length and special characters for the password.

Scheduling a Session

An Event Manager schedules Symposium and Conference sessions.

To schedule a Symposium or Conference session:

1. Log in to the Centra Server as an Event Manager.
2. Click Manage Events.
3. Click New Event.
4. Type the session name in the Event name field.
5. Use the calendar picker to set the Day. Specify the Time and Time zone.
6. Select the Duration in Hours and Minutes for a specific time or Ongoing to have the session always available.
7. Type in the **Contact** for the session. By default, this is your name.

8. Select a Cost Center from the list, if used.

9. Type the number of users you want to allow in the session in the **Enrollment limit** field.

10. If you have more than one server, select the **Server** to conduct the session.

11. Select a session type: **Symposium** or **Conference**.

   **Note:** eMeetings are scheduled on the Create Meeting page. Any user can create a meeting. See “Creating a Meeting” for more information.

12. Select any of the following session options:

   - **Record event** - If selected, enables the Server-Side Recorder.
   - **Live video** - If selected, the Leader can enable video in Symposium or Conference.
   - **Display number of participants (Conference events only)** - If enabled, shows the number of Participants currently attending the Conference session (shown in the Participants area in the client interface).
   - **Allow personal recording (CKOS)** - If selected, users with Centra Knowledge Object Studio (CKOS) can record the session and save the recording locally.
   - **Welcome URL** - Enter the URL for the content that appears in the Media Window when first entering the session.
   - **Logout URL** - Enter the URL to appear in a Web browser when users close Symposium or Conference.

13. Optionally select a **Subject**. To schedule a session with no structured content, select **<None>**. See “Subjects” for information on creating a Subject.

14. Select the protocol used to transport the session content:

   - **HTTP** (default). Using port 80 by default, this Port is usually open on firewalls. Use HTTP if there are any network problems that prohibit the use of the Centra protocol.
   - **Centra Event Protocol (CEP)**. Using this protocol, the Centra Server is able to control the content stream to adapt to connection speeds so that there is no impact on audio quality and clients can pre-fetch the next Agenda slide (in the background).

15. Enter any of the following **Event Options** as needed:

   - **Early Attendance Limit** - Set an Early Attendance Limit if you want to limit how early a participant can attend the event.
   - **Password** - If you want the session to be private, enter a password in the Password and Retype Password fields.
   - **Public event (users can self-enroll from the Event List)** - Enabled by default, this option allows users to enroll themselves in the session from the Event List. By unchecking this option, you can create a “private session.”
- Allow download playback - If enabled, users can play back the recorded event without a connection to the server.
- Allow guest attendees - If enabled, guest users can attend the session and play back a recording of the session.

16. Select the Audio Option. If using the telephone for audio, enter the phone number to join the teleconference and the access code in the Teleconference call # and Access code fields. If the creator of the event has teleconference information as part of his or her User Profile, that information appears by default.

17. When done, do one of the following:
- Click Create to schedule the session on the selected server.
- Click Create & Edit Enrollment if you are ready to enroll users in the session. Refer to See “Enrolling Users or Groups” for information on enrolling users.

Scheduling Tips

- The server allows you to create sessions with the same name.
- The default day is the current server system clock date and time. The time zone provides an offset from the Centra Server's system clock so the session appears in the Event List as the current time on the user’s schedule.
- Enrolled Participants can log into the session at anytime before the scheduled start time.
- If you chose a specific time when scheduling a session, the session automatically moves from the user's "Upcoming" to "Past" tabs on their My Schedule page when the time has passed.
- The Leader is included in the enrollment count and all members in a group are counted individually.
- Your server license determines if you are allowed to create Symposium and/or Conference sessions.

Enrolling Users or Groups

Once you have created a Symposium or Conference session, you can enroll users or groups of users. See “Creating a Group” for information on groups.

To enroll users or groups in a Symposium or Conference session:
1. Log in to the Centra Server as an Event Manager.
2. Click Manage Events.
3. Locate the session in which you want to enroll users and click Edit enrollment.
4. If necessary, click the Add To Enrollment tab.
5. Locate the name of the user or group of users you want to enroll, and click Enroll.
If you want to enroll multiple users or groups at once, select the users and/or groups by selecting the checkboxes next to their logins or click **Select All** to select all users and groups on the page. Then click **Enroll Selected**.

The users and/or groups are immediately enrolled in the session.

If the Centra Server is configured for automatic email, the enrollment email opens. You can:

- Change the subject.
- Insert additional text (in two places in the message).
- Click the **Include optional text in outbound message?** checkbox to include a URL to a Guest Attend page. See “Guest Attend” for more information.
- Click **Send Email** to send the email.

**Special Roles in a Session**

When you schedule a Symposium or Conference session and enroll users, they are automatically enrolled as Participants. You can then appoint a Leader to conduct the session. You may also want to appoint a Recorder to record the session using the Client-side Event Recorder, and a Remote Application Host to share a remote application.

If this is a Conference session, you can designate up to four other enrolled Participants as Co-Presenters. They must be specified **before** the session, and they have access to the full range of interactive tools. In Symposium sessions, Leaders can promote a Participant to a Co-Presenter only while in session.

**To assign special roles for a Symposium or Conference session:**

1. Log in to the Centra Server as an Event Manager.
2. Click **Manage Events**.
3. Locate the session and click **Edit enrollment**.
4. If necessary, click the **Current Enrollment** tab.
5. Locate the individual you want to appoint a special role.
6. In the Leader, Recorder, Co-Presenter, or Host columns, click **No**. The Centra Server updates the column to read **Yes** and the individual is appointed to the special role (this is a toggle).

Keep these tips in mind:

- Only one user can be assigned to the Leader role at a time. If you assign the Leader role to another user, that person becomes the Leader.
- A Leader or Co-Presenter can also have the role of Recorder. More than one person can be assigned to be the Recorder.
- Multiple users can be assigned to the Remote Application Host.
- A Conference session can have up to four Co-Presenters.
Creating a Group

Groups are multiple users who can be simultaneously enrolled in a Symposium or Conference session. This is an efficient way to enroll and schedule multiple users at once. You can create a new group at any time.

To add a group:

1. Log in to the Centra Server as an Event Manager.
2. Click Manage Users.
3. Click Add Group.
4. In the Group Name field, type a name for the group.
5. Do one of the following:
   - Click Submit and Edit if you are ready to add users to the group. See “Adding a User to a Group” for more information.
   - Click Submit to add the group without adding users.

Adding a User to a Group

You can add users to a group at any time. Users can belong to multiple groups.

To add users to an existing group:

1. Log in to the Centra Server as an Event Manager.
2. Click Manage Users.
3. Locate the group you want to edit. Group names appear in italics.
4. Click Edit associated with the group.
5. Click the Add to Group tab, if necessary.
6. Find the user you want to add to the group. Users do not need to be assigned the same roles to be in the same group.
   
   **Note:** Groups can NOT include other groups.
7. Click Add associated with the user. The user is added to the group.
   
   **Tip:** If you want to add multiple users at once, select the users by clicking the checkboxes next to their login. Or, to select all users on the page, click Select. When done selecting, click Add Selected.

Guest Attend

Guest Attend allows users to attend a Symposium, Conference, or eMeeting session without being pre-registered and pre-enrolled. Guest users can only access a session via the Guest Attend page. A URL brings users directly to the Guest Attend page.

**Note:** Guest users are counted in the enrollment limit and the number of active accounts.

To use this feature, Allow guest attendees must be selected in the Event Options.
area when creating a Symposium or Conference session. For eMeeting, this option is selected by default. If this option is not selected, users cannot attend the session from the Guest Attend page unless they have been pre-enrolled.

To locate the URL for the session:
1. Log in to the Centra Server as an Event Manager.
2. Click Manage Events.
3. Locate the session.
4. Click Modify associated with the session.
5. Copy the Guest Attend URL in the Event Options area.

Managing the Content Catalog

The Content Catalog allows Participants to access additional materials at any time. It gives you a way to organize files and non-web accessible resources (such as video tapes) that you want available to users before, during, and after an event.

To add content to the Content Catalog:
1. Log in to your My Schedule page.
2. Click on Manage Catalog.
3. Click Import.
4. Select the type of import (File, Centra Recordings, HTML, or eLearning Content) and click Import.
5. Click Browse to locate the file you want to import.
   The Add New File page displays.

As the Event Manager, you can also:
- Remove content from the Catalog
- Create new Categories
- Create a Frequently Asked Question or Reference documents

Creating a Web Seminar

An Event Manager can create Web Seminar events with an accompanying Web page for marketing purposes. A Web Seminar event can be either a Conference or Symposium event.

A wizard walks you through the steps to creating a Web Seminar:
1. Log in to the Centra Server as an Event Manager.
2. Click Manage Events
3. Click New Web Seminar.
4. Click Next.
Enter Schedule Information

1. Type the event name
2. Use the calendar picker to select a date
3. Select a Time and time zone
4. Select the Duration in Hours and Minutes
5. Type in the Contact for the event
6. Select a Cost Center from the list, if used.
7. Enter the number of users you want to allow in the event in the Enrollment limit field. The Leader is included in the count; all members in a group are counted individually.
8. If you have more than one server, select the Server to conduct the event.
9. Select an event type: Symposium or Conference.
10. Select the appropriate event options: Record event, Display number of participants (Conference events only), Allow personal recording, Live video, Welcome URL, and Logout URL.
11. Determine which protocol is used to transport the event content: HTTP (default) or Centra Event Protocol (CEP).
12. Set an Early Attendance Limit if you want to limit how early a participant can attend the event.
14. Select an Audio Option
15. Click the Next button.

Enter Agenda Information

There are three ways to provide content for a Web Seminar event:

- Select an existing subject for use in this Web Seminar event
- Create a new agenda and subject and upload the agenda to the server
- Import PowerPoint content into the Web Seminar event at the time the event is run.

When you have made your selection, click Next.

Enter Presenter Information

1. On the Presenters: Web Seminar Title page, select a Leader from the list. All Web Conference events must have a leader.
2. Select zero or more Co-Presenters from the Co-Presenter list.
3. If the event is going to be recorded using the Client-Side Event Recorder, select a user name to server as a Recorder for this Web Seminar event.
4. Click Next.

Enter Registration Information

The Registration page is where the attendees will register for the Web event. This page allows you to specify the look and feel of the registration Web page.

1. Specify a Banner for the registration Web page using the drop down list.
2. Set Title Font, Body Font, Color, Background Color, and other options.
3. Under Presenters, click the checkbox to the left of the name if you want the name of the Leader or Co-Presenter to appear on the registration Web page. Change the number to specify the order in which they will be displayed.
4. Click the Preview button to view a preview of the registration Web page.
5. Click Next.

Enter Survey Information

A Web Seminar Event survey is a series of questions you ask attendees. There are two types of surveys:

- A registration survey which appears after the registration page
- A post-event survey which appears to all attendees when they exit the event

1. Under Survey Formatting, specify the Question Font
2. Under Registration Survey, select the name of the survey you want to use on the registration Web page. You can preview this survey by clicking the Preview button.
3. Under Post-Event Survey, select the name of the survey you want to use after attendees attend the Web Seminar event.
4. Click Next.

Creating a New Survey

1. On the Surveys: Web Conference Title page, click Question Template to download the question template to your machine.
2. Open the file in a spreadsheet application as a comma-delimited text file.
3. Make changes and save the file with a new name as a comma-delimited text file.
4. On the Surveys: Web Seminar Title page, enter a name for the new survey in the Name field.
5. Click the Browse button and find the file you just created.
6. Click Open.
7. Click Upload to upload the new survey file to the server.
8. Click Next.
Enter Email Information

There are five emails that may be sent to attendees automatically:

- Confirmation Email - Sent when an attendee registers
- 1-Week Reminder - Sent one week before the event start date
- 1-Day Reminder - Sent 36 hours before the event start date
- Thank You Email - Sent to guests who attended the event
- Sorry We Missed You Email - Sent to guests who registered for the event but who did not attend.

1. On the Email: Web Seminar Title page, you see a list of all emails what will be sent automatically for this event. Select the emails you want sent and deselect those you do not want sent.

2. Click Edit to the right of an email to edit the email contents

3. Click Preview to the right of an email to preview the contents.

4. For the Thank You and Sorry We Missed You emails, specify when these will be sent by selecting from the dropdown list.

5. Click Next.

Review the Web Seminar

The Summary page allows you to review the information about the Web Seminar event

1. Select any underlined item in the Summary to review it.

2. Under Reviewers, select the name of the person or persons who are responsible for reviewing and approving this Web Seminar page.

3. Under Status, check the Event is ready to be reviewed checkbox

4. Click Done.

Reviewing a Web Seminar Event

The person or persons responsible for reviewing the Web Seminar Event will be notified by email that there is a pending event. The email contains a url that takes the reviewer to the appropriate server and domain.

To review and approve an event:

1. Locate the Web Seminar event you want to review and click Modify

2. Move through the screen reviewing the event configuration or select Summary.

3. If you are satisfied with the Web Seminar event setup, select Approved - Registration Open under Status on the Summary page.

4. Click Done.

The URL for the Web Conference registration Web page displays on the Summary page.
Chapter 8
Centra Scheduler for Microsoft Outlook

The Centra Scheduler for Microsoft Outlook allows you to create Symposium, Conference, and eMeeting sessions using Microsoft Outlook. This feature allows you to easily create a session using the familiar Outlook interface and existing distribution lists.

Note: You must have at least Microsoft Outlook 2000 or Microsoft Outlook 2002 Pro (Office XP Professional edition) to use this feature.

Installing and Setting Up

Before you can use the Centra Scheduler for Microsoft Outlook, you must download it from the Centra Server and install it.

Note: It is recommended you close Outlook before installing the Centra Scheduler for Microsoft Outlook.

To install and set up Centra Scheduler for Microsoft Outlook:

1. Log in to the Centra Server.
2. Click Downloads.
3. Click Centra Scheduler for Microsoft Outlook on the Downloads page.
   Tip: You may want to print out a copy of the Centra Scheduler for Microsoft Outlook page.
4. Click the CentraOutlook_<timestamp>.exe link.
   The File Download dialog box appears.
5. Select one of the following:
   - Click Run this program from its current location (or Open). The Centra Scheduler for Microsoft Outlook file downloads to your computer.
   - Click Save. Select a location to save the file where you can easily access the downloaded file and click Save. When the download is complete, click Close. Locate the file you just downloaded and double-click it.

To install and set up Centra Scheduler for Microsoft Outlook:
1. Locate the file you just downloaded and double-click it.
2. Select the location where you want to install the Centra Scheduler for Microsoft Outlook and click Next.
3. When done, click Finish.
4. Open Microsoft Outlook on your computer.
5. Click the Centra button on the Outlook toolbar, or open the Calendar and select Actions, New Centra Event.
   A new Outlook invitation appears. The Centra Event tab displays.

Centra Scheduler for Microsoft Outlook configures your personal profile for you including user name, password, server, and domain.

Note: Do not share the program you have downloaded. New Centra Scheduler for Microsoft Outlook users should download their own copy from their home page.

Scheduling a Session with Outlook

Using Centra Scheduler for Microsoft Outlook, you can schedule a Centra 7 session using Microsoft Outlook. You are automatically the Leader for the events you create.

To schedule a session using Microsoft Outlook:
1. Make sure that you installed the Centra Scheduler for Microsoft Outlook. See “Installing and Setting Up” for more information.
2. Open Microsoft Outlook on your computer.
3. Click the Centra button on the Outlook toolbar, or open the Calendar and select Actions, New Centra Event.
   A new Outlook invitation appears.
   Note: All Outlook windows have a Centra button.
4. Enter the email address of the users or distribution email list in the **Required** and **Optional** fields (as you normally do in Outlook).

You can invite as many users as you need. Centra automatically sets the room capacity to the number of users you invite to your Conference or Symposium event. the number of users you can invite to an eMeeting event is limited by your user account.

5. Type in the **Subject** for the session (as you normally do in Outlook). This will become the Event name.

6. Type in the **Start time** and **End time**.

7. Add a message and/or set a reminder.

8. Click the Centra tab.

9. Select the **Event type** you want to schedule from the list.

    **Note:** The selections available depend upon your privileges and the products you have licensed.

10. If you selected eMeeting, optionally select **Start Now** to begin the session immediately after creating the session.

11. Type the number of users you want to allow in the session in the **Enrollment limit** field if you want to allow space for additional guests beyond those you invited.

    **Note:** The session creator is included in the count and all members in a group are counted individually.

12. Select any of the following session options:

    - **Record event (Symposium and Conference only)** or **Record meeting (eMeeting only)** - If selected, enables the Server-Side Recorder.
    - **Live video** - If selected, the Leader can enable video in session.
    - **Public event (users can self-enroll from the Event List)** **Symposium and Conference only** or **Post to public Event List (so other users can self-enroll)** **eMeeting only** - If selected, allows users to enroll themselves in the session from the Event List. If unselected, you can have a “private session.”
    - **Password** - If selected, type and retype a password in the Password fields.

13. If necessary, select the Server and CCS.

14. Select Internet audio (VOIP) or Telephone (Teleconference).

15. If desired, click the Attendee Availability or Scheduling tab to check the invitees’ Outlook Calendars to see if they are available.

16. Click Send.

The session is scheduled on your Centra Server and Outlook invitations are sent to everyone you invited. Symposium and Conference sessions appear in the Events folder while eMeeting sessions appear in the eMeetings folder.

**Note:** Recurring Outlook events become ongoing Centra events.

When invitees accept the invitation, the session is added to their Outlook calendar. The invitation includes the session name, date, time and link to the session.
All unregistered users attend as guest users.

### Updating an Event

In general, if you created a session using the Centra Scheduler for Microsoft Outlook, you should update the session using the Centra Scheduler for Microsoft Outlook. You may want to:

- Change the date and time
- Invite or uninvite users
- Cancel the session
- Update any of the fields on the Centra tab

You should update the list of the invitees from the Centra Scheduler for Microsoft Outlook. If you enroll or unenroll users from the Edit Enrollment page, the users are enrolled but they will not update in Centra Scheduler for Microsoft Outlook.

**Note:** The list of names in the To: field in Outlook represents all users who have been invited to the event. If you remove a user from this list, the user will be removed from the invite list and the user will be notified.

If you need to update the following fields for a session, update them on the Manage Events page:

- Contact
- Subject (Agenda for the session) - Symposium and Conference only
- Content distribution protocol
- Welcome or Logout URL

**To update these fields:**

1. Log in to the Centra Server as an Event Manager.
2. Click **Manage Events**.
3. Locate the session you created.
4. Click **Modify**.
5. Update only the Contact, Subject, Content distribution protocol, or Welcome/Logout URL fields.
   
   **Note:** If you update any of the other fields, the changes will not appear in the Centra Scheduler for Microsoft Outlook.

6. Click **Modify**.

### Centra Scheduler for Microsoft Outlook Tips

- Make sure that you check the invitees’ Outlook Calendars to see if they are available.
Check your System Capacity on the Centra Server before scheduling the session. If you try to schedule a session at a time when your server does not have adequate capacity, you may receive a warning message. Check with your Centra System Administrator.

You can invite anyone including guests.

Assign a Co-Presenter, Recorder, and Remote Host as you normally do from the Centra Server. You can enroll users from the Edit Enrollment page but the changes will not be updated in the Centra Scheduler for Microsoft Outlook.

If desired, set a reminder for the session and create a message on the Appointment tab as you normally do in Outlook.

You can only view events off-line using Outlook; you cannot create new events through Outlook off-line.

Set up a new event from within an email by clicking on the Centra button within the email. Scheduler for Microsoft Outlook opens containing event invitees taken from the To field in the email and with an event name taken from the subject of the email.

You can have attachments in the email invitation; however, you cannot embed graphs or tables.
A Centra 7 session can be set up to use either Voice Over the Internet or a conference call.

To attend a Centra 7 session using Voice Over the Internet, you need a headset with:

- A microphone
- Ear piece
- Two plugs at the end of the headset cord. One plug is for the speaker (so you can hear), and the other plug is for microphone (so you can speak).

**Note:** You can also use a separate microphone and speakers.

### Connecting a Headset

Before attending a session, connect a headset to your computer.

**To connect a headset:**
1. Locate the icons for microphone and speaker on the plugs of your headset.
2. Match the icons on the plugs to the jacks on your computer.
   - The microphone jack may have the word "mic," or a picture of a microphone.
   - The speaker jack may have the word "out," or a picture of a speaker.
3. Plug in the headset to the computer.
4. Make sure the volume control on your computer is turned up.
5. In session, test your audio with the Centra Audio Wizard.

Using the Audio Wizard

Before you participate in or lead a Symposium, Conference, or eMeeting session, you must set audio options in the **Centra Audio Wizard** for optimal sound quality. This wizard:

- Checks your microphone and sound card installation.
- Helps you adjust your speaker and microphone for optimal playback and recording.
- Allows you to communicate clearly with others during a session.

The first time you log into a Centra session, the Audio Wizard opens automatically. Otherwise, select **Tools, Audio Wizard** while in session.

**To configure audio using the Centra Audio Wizard:**

1. If the computer has more than one Recording or Playback device, select **Microsoft Sound Mapper** from the drop down lists. When done, click Next.
2. Click Play.
3. Adjust the Playback volume using the slider to a comfortable level. When done, click Next.
4. Click the Test button and speak into your microphone. Optimal speaking levels are green in color, moving towards red.
   The Audio Wizard records a five second sample and then plays back the recording.
5. Adjust the Recording volume to a suitable level using the slider. When done, click Next.
6. Select one of the following options. See “Modes of Speaking” for more information.
   - **Speaker Mode** (default setting)
   - **Headset Mode**
7. If you select Headset Mode, optionally click the box next to **Voice activated** to speak hands free.
8. Do one of the following:
If you selected Speaker Mode or Headset Mode without Voice activated, click Finish.
If you selected Headset Mode with Voice activated, click Next and continue to Step 9.

9. Click Test to listen to your microphone's volume.
10. Adjust the slider to set the volume for your audio transmission.
   A lower setting on the slider picks up the voice sounds when speaking softly. A higher setting picks up voice sounds when speaking loudly.
   Be aware of the following:
   □ Background noise that may activate transmission.
   □ If you encounter echoing, adjust the threshold to the right, or go back to the Mode Settings page and select Speaker Mode.
   □ If you miss words, adjust the threshold to the left.

11. Click Next.
12. Click Test to listen to how your voice transmits.
13. Adjust the slider to set the pause length for audio transmission.
   For example, if you frequently pause in your speech, select a higher setting so the audio continues to transmit when you pause. If you select a lower setting, your audio stops transmitting as soon as you stop speaking.

14. Click Finish.

Modes of Speaking

In the Centra Audio Wizard, select the following speaking modes:

Speaker Mode

Speaker mode is the default setting for speaking and listening. You listen using your computer’s speakers, and talk by pressing the Ctrl key, clicking the Talk button, or clicking the Lock to Talk button. See “Speaking” for more information.

In Speaker Mode, you cannot hear others speaking (to prevent loopback) when you are speaking (if the number of concurrent speakers is greater than 1). Loopback is a term used to describe the situation where the microphone picks up the audio speaker on a PC or laptop. The audio "loops" from the speaker to the microphone continuously distorting the sounds. It is similar to the term "feedback" regarding microphones.

Headset Mode

Select Headset Mode if using a Headset to listen or you are using Voice Activation. Press the Ctrl key, click the Talk button, click Lock to Talk, or use Voice Activation to speak to others. See “Speaking” for more information.
Note: Do not select Headset Mode unless you are using a Headset (to avoid loop-back).

With Headset Mode, you can hear others while you speak (as if speaking on a telephone) if concurrent speakers are set to more than one. See “Multiple Concurrent Speakers” to learn how to adjust your audio settings for Headset Mode.

Voice Activation

Voice Activation allows you to speak hands-free. You can select Voice Activation only when you use Headset Mode. Your voice transmits when you speak above the volume set in the Audio Wizard. See “Using the Audio Wizard” for more information.

Warning: Be aware that everything you say will be heard.

Multiple Concurrent Speakers

Centra 7 allows multiple concurrent speakers in Symposium, Conference, and eMeeting sessions. Up to four users can speak and be heard simultaneously with adequate bandwidth during a session. (The default audio configuration for a session is one speaker.)

The Event Manager can specify the number of concurrent speakers when creating a Symposium or Conference session. During a Symposium, Conference, and eMeeting session, the Leader can modify the number of concurrent speakers.

If you change this setting while in session, changes are temporary and only apply to that session.

To set the number of concurrent speakers in session:

1. Access the session by clicking Lead on your My Schedule Page.
2. Select Tools, Voice Options.
3. Select from one to four speakers from the Number of speakers drop down.
4. Click OK.

Speaking Priority by Role

In a Symposium, Conference, or eMeeting session, speaking priority is in the following order:

- Leader
- Co-Presenters or Breakout Leaders
- Participants

Speaking

You must have a microphone icon next to your name before you can speak to others. To speak to others, do one of the following:
Hold down the Ctrl key during the entire time you are speaking.

Click Talk in the Audio area. Click and hold the mouse button.

Click Lock-to-talk in the Audio area by selecting the padlock. Click ‘lock-to-talk’, once to switch speaking mode on and then once to switch speaking mode off.

Set Voice Activation in the Centra Audio Wizard.

Audio Troubleshooting Guidelines

- Run the Centra Audio Wizard.
- Verify hardware requirements.
- Verify proper headset, speaker, and microphone setup.
- Replace headset, speakers, or microphone.
- Shut down all applications not needed for the session.
- Verify the Sounds and Multimedia properties on the computer.
- Check possible connection problems.

Broadcasting Video

You can broadcast live video in Symposium, Conference, and eMeeting.

In Symposium and Conference, the Event Manager enables video broadcasting for individual sessions when scheduling the session. In eMeeting, you must select the Enable video option on the Create Meeting page when scheduling the session.

Using the Centra Video Wizard

Use the Video Wizard to preview video and change video settings before launching a session.

To use the Video Wizard:
1. Access the session by clicking Lead or Attend on your My Schedule Page.
2. Select Tools, Video Wizard.
3. Focus the camera and position it to the desired angle and distance.
4. To see a reverse camera view, as if looking into a mirror, check the Mirror Locally box.
5. Click Finish.

If no camera is connected to the Leader’s PC, an error message displays.

Starting Video Broadcast

If the session is set up for video broadcasting, a Leader launches video while in the
To start the video broadcast:

1. Click the Video button  on the toolbar. Or, select Video, Start Video.
   Note: The video button only appears in color if video is enabled for the session.
   The video broadcasts in the Video panel above the Presenter panel.

2. To stop video broadcast, click the Video button  on the toolbar. Or, select Video, Stop Video.
   Note: By default, when launching Appshare or Web Safari, video broadcast disables.
   When exiting Appshare or Web Safari, video broadcast resumes automatically.

Tips on Video

- Using the Video menu, you can undock and move the video panel.
- You can configure the size of the video panel up to a maximum of 640x480.
- To manually grant video control to a participant with a camera, right click the participant’s name and select Grant video camera
- To automatically switch video control to whoever is speaking, select Video, Automatic Video Switching.
By recording a session, you can see and hear the interaction and Agenda content presented during the session. The Leader and Participants enrolled in a session can play a recording after it is published.

Centra 7 has three recording features to record a session:

- Server-Side Recorder
- Client-Side Event Recorder (Symposium and Conference only) - Publish and Produce
- Centra Knowledge Object Studio (CKOS)
Overview of Recording Methods

The following highlights when to use each recording method:

<table>
<thead>
<tr>
<th>Method</th>
<th>Product</th>
<th>When to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server-Side Recorder</td>
<td>S C M</td>
<td>To start recording a session automatically and then publish directly to the Centra Server. Creates a Centra proprietary format (SRD) file.</td>
</tr>
<tr>
<td>Client-Side Event Recorder - Publish</td>
<td>S C</td>
<td>To record live sessions and to create self-paced playback sessions. Creates a Centra proprietary format (SRD) file.</td>
</tr>
<tr>
<td>Client-Side Event Recorder - Produce</td>
<td>S C</td>
<td>To create a portable industry standard recording of an session. Creates a .WMV format file.</td>
</tr>
<tr>
<td>Centra Knowledge Object Studio (CKOS)</td>
<td>S C M</td>
<td>To create scripted self-paced recordings, or &quot;knowledge objects,&quot; that can be edited and distributed to users in a variety of ways. Records the playback in AVI format, which can then be converted into WMV, ASF, or RM format.</td>
</tr>
</tbody>
</table>

Server-Side Recorder

A Leader or Co-Presenter can use the Server-Side Recorder to directly record and publish a recording of a session they are leading.

**Note:** Other users cannot use the Server-Side Recorder.

This recording method creates a recording of everything (voice, choreography, and content) that happened in the live session. (Breakout Rooms are not recorded.) The Leader/Co-Presenter can pause and resume the recording during the session.

Recordings are published in the Centra proprietary format (SRD) and can be uploaded directly to the Centra Server. This format supports Participant interactivity during playback. For example, during playback the Participant can take an Evaluation, click on links in an HTML page and participate in a survey. Additionally, the Centra proprietary recording can be combined with another proprietary recording.

For Symposium and Conference, your Event Manager must have enabled Record event when creating the session. See “Scheduling a Session” for more information. For eMeetings, the Leader must have selected Record meeting on the Create Meeting.
Client-Side Event Recorder

The Client-Side Event Recorder is a tool that records all audio, choreography, for example, hand raising and yes/no indicators, and the Media Window. (Breakout Rooms are not recorded.)

Recordings are designed for playback from a Web server, such as the Centra Server. There are two methods for saving a recording created with the Client-Side Event Recorder.

- The first method publishes the recording to the Centra Server using a proprietary Centra format (.SRD).
- The second method produces the recording into an industry standard digital video format (.WMV) and then stores the video either on a Centra Server or on a streaming media Web server.

The most significant difference in the two Client-Side Event Recorder formats is that the Centra proprietary format (.SRD) published to the Centra Server supports Participant interactivity during playback. For example, during playback the Participant can take an Evaluation, click on links in an HTML page and participate in a survey. Additionally, the Centra proprietary recording can be combined with another proprietary recording.

The .WMV format is an industry standard digital video format. The .WMV file can be published to a Centra Server or to a streaming media server. The .WMV recording is not interactive. However, it is portable; the .WMV file can be distributed on a CD-ROM or posted to any Web server.

To allow users to use the Client-Side Event Recorder, your Event Manager must designate a Recorder for the session. See “Special Roles in a Session” for more information.

Centra Knowledge Object Studio (CKOS)

The Centra Knowledge Object Studio (CKOS) includes the Centra Recorder and the Centra Producer. CKOS, like the other recording methods, creates a recording of everything, voice, choreography, and content, that happened in the live session.

Use the Centra Recorder to record live Centra sessions in an industry standard format (.AVI). An .AVI file can be edited using any number of software applications including the Centra Producer.

The Centra Producer is an editing tool for .AVI movies. This tool allows you to break recordings into smaller learning modules or to edit out portions of the recording. Unlike the Server-Side Recorder and Client-Side Event Recorder, CKOS provides the ability to edit recordings.

To allow Participants to use CKOS to record a Symposium or Conference session, the Event Manager must select Allow personal recording (CKOS) when scheduling the session. (This feature is enabled by default. See “Scheduling a Session” for more information.)
Note: For eMeetings, this option is automatically enabled.

Playing Back a Recording

The Leader and Participants enrolled in a Symposium, Conference, or eMeeting session can view a recording after it is published to the Centra Server.

To view a recording on the Centra Server:

- Click Playback associated with the session on the My Schedule page.
- Enter the Guest Playback URL your Event Manager gave you in your browser window. Type in your Email address and click Playback. If necessary, enter your first name, last name, display name, password, and click Playback.

Note: To use the Guest Playback URL, your Event Manager must select Allow guest attendees when creating the session. See “Scheduling a Session” for more information.

After you click the Playback link, the recording plays back in the Centra playback window or a standard media player depending on the format of the recording.

Note: If the Allow Download Playback checkbox is checked when a Symposium or Conference event is created, participants playing back the Centra proprietary (.SRD) recording will have the option of downloading the recording and playing it back when not connected to the server.

Note: Recordings may be hosted on a remote Web server.