# White Lion Meeting Edition – Quick Reference Guide

Welcome to a world where remote meetings are more productive. Welcome to a place where you hear and see your participants, even though they are time zones apart. Welcome to White Lion Meeting Edition. You now have a tool that allows you to see, hear and engage as if everyone is in the same room.

With White Lion Meeting Edition, your online meetings are easy to organize and conduct. Simply schedule and invite participants to your meeting using Microsoft Outlook®. When you are ready to meet, participants just click the White Lion Meeting Edition link in your invitation and are instantly placed into your meeting space. It's that easy. You have the tools to control the meeting, engage with participants and ultimately, get work done more efficiently.

The following guide delivers quick steps to start or join a conference, as well as great tips for managing your remote meetings.

## PLAN YOUR MEETING

### *Content Management Pages*

Raindance content management pages enable you to manage your pre- and post-meeting activities. Whether you want to view and manage recorded meetings, store documents, access reports or create and edit polling questions, your content management pages allow you to do it all.

**Q: How do I access content management pages?**

A: Click on the **URL** located on your home screen in White Lion Meeting Edition. You can also direct your participants to your content management pages to view stored documents or listen to recorded meetings.

### *Send Meeting Invitations*

**Q: Can I use Microsoft Outlook® to invite participants to a meeting?**

A: Yes. However you must first enable Outlook integration with White Lion.
On the Tools menu, click **Enable Outlook Integration.**

**Q: How do I invite people to a meeting?**

A: There are two ways to invite participants:

1. *Before the meeting* – If Outlook integration is enabled, click **New White Lion meeting** in Outlook. An Outlook meeting invitation displays.
2. *Before or during the meeting* –
   On the File menu, click **Send E-mail Invitation.** Your default e-mail program displays.

Your e-mail invitation is pre-populated with the meeting login information, and participants join your meeting by clicking the link.

**Q: Do participants automatically join a meeting when accepting a Raindance Meeting Edition invitation?**

A: No. By accepting an Outlook meeting invitation, participants schedule the meeting in their calendars and notify the moderator. To join the meeting, participants must click the link in the meeting invitation at the scheduled time.

## *Polling Questions*

Polling questions are created before or during a meeting to gather information from participants during the meeting.

**Q: How do I create a polling question set?**

A: To create a polling question set before a meeting:

1. Log into your content management pages.
2. Click **Question Sets**.
3. Click **Create New Question Set**.
4. Name your question set.
5. Enter your questions.
6. Enter answers or select answers.
7. Click **Add Question**.
8. Click **Save**.

**Q: How do I add a new polling question?**

A: To add a new question to an existing polling question set:

1. Select the Add Question tab.
2. Click the pencil icon next to the question set you want to modify.
3. Enter your question.
4. Enter either custom answers or select from pre-set answers. *Each custom answer must be on its own line within the field.*
5. To allow more than one answer to be chosen, select **Allow participants to select more than one answer**.
6. Click **Add Question**.
7. Click **Save**.

## *Stored Documents*

Stored documents are documents uploaded to your content management pages and made available to your participants for download.

**Q: How do I upload a new stored document?**

A: To upload a new stored document:

1. Click **Stored Documents** from your content management pages.
2. Click **Upload New Stored Document**.
3. Complete the document details.
4. Specify who can access the document.

5. Click **Upload Document**.

## *Billing Codes*

Billing codes are numbers you assign to meetings that enable you to track expenses in order to charge a conferencing fee back to a client or an internal group. To activate the billing code feature, contact clientservices@uswhitelion.com.

Once this feature is active, you are prompted when starting a meeting to enter a billing code or choose a previously used billing code from the menu in the billing code dialog. On the phone,
you are also prompted to enter a billing code on your phone keypad. If there is not a billing code associated with your meeting, click **Cancel** when the billing code dialog appears and press pound (#) on your phone keypad when prompted to enter a billing code.

**Q: How do I change a billing code for a meeting after the meeting has ended?**

A: To change a billing code entered in White Lion Meeting Edition:

1. Click **Manage Your Account** on your home screen to access your meeting reports.
2. View the Details of your audio or web report.
3. Click **Edit** next to the existing billing code.
4. Enter the new billing code into the New Billing Code field.
5. Click **Update**.

## *Additional Security*

**Q: What are passcodes?**

A: Passcodes are four- to nine-digit codes that provide an additional layer of security for your meeting. In your profile, from the Security tab, select **Prompt me to set a new passcode for every meeting.** Participants joining a meeting secured by a passcode must enter the passcode before they can join.

You can also require a security passcode before participants can join the phone portion of your meeting. To enable this feature, contact clientservices@uswhitelion.com.

**Q: How do I create a new passcode?**

A: To create a new passcode within White Lion Meeting Edition:

1. On the File menu, click **Edit Profile**.
2. Select the Security tab.
3. Choose **Prompt me to set a new passcode for every meeting** in your profile.
4. Start a new meeting. The passcode dialog displays.
5. Enter the passcode in the field or choose a previously used passcode from the drop-down menu. The passcode must be four to nine digits.
6. Click **OK.** Your participants are prompted to enter that passcode when joining your meeting.

To create a new passcode on the phone:

1. Connect to the phone portion of the meeting.
2. When prompted, enter a passcode on your phone keypad, followed by the pound (#) key.
3. Confirm the passcode.

**Q: How do participants know the passcode for my meeting?**

A: To ensure participants know the passcode for your meeting, it must be included in the meeting invitation. If you are inviting participants before or during a meeting by sending an e-mail invitation through White Lion Meeting Edition, your passcode is automatically inserted.

**Q: How do I give my meeting participants the passcode?**

A: Before you start your meeting, create your passcode. If you already selected to set a new passcode for every meeting in your profile, click **White Lion Meeting Information** in your Outlook invitation and enter the passcode in the passcode field. If you did not select **Prompt me to set a new passcode for every meeting**, you must enter the passcode directly into your meeting invitation. During your meeting, if you send an e-mail invitation to a new participant through White Lion Meeting Edition, the passcode is automatically inserted into the invitation.

If you are using a passcode for the phone portion, you must also include this information in your invitation.

**Q: Can I encrypt my meeting for additional security?**

A: To encrypt specific meeting features:

1. On the File menu, click **Edit Profile**.
2. Select the Security tab.
3. Select the checkbox by the features you want to encrypt. The following features can be encrypted: Document Viewing/Whiteboarding, Application Sharing/Browser Sharing, Participant Information, Chat, Video, Polling and Question & Answer.
4. Click **OK**.

To end feature encryption, clear the checkbox for that feature. If you change your feature encryption settings during a meeting, you must first log out and then log back in for changes to take effect.

## ACCESS YOUR MEETING

### *Start a Meeting*

**Q: How do I start a meeting?**

A: From your Raindance Meeting Edition home screen, click **Start a Meeting**. You are prompted to select or enter a phone number. You will be called at this phone number to start the phone portion of the meeting.

**Q: How do I set the default role of participants joining my meetings?**

A: As the meeting moderator, you assign meeting participants a default role.
You can also change their role or choose to set unique feature permissions for each meeting.
To change the default role for your meeting participants:

1. On the File menu, click **Edit Profile**.
2. Select the Meeting Info tab.
3. Choose a default role from the drop-down menu.
4. Click **OK.**

**Q: How do I change my profile information?**

A: To change your profile information:

1. From your White Lion Meeting Edition home screen, click **Manage Your Account**.
2. Click **Change** next to Your Personal Info.
3. Edit the fields to change your profile information.
4. Click **Change**.

**Q: How do I choose what profile information is shared in a meeting?**

A: To choose your profile information shared in a meeting:

1. On the File menu, click **Edit Profile**.
2. Select the **Share In Meeting** check box of the profile information you want to share.
3. Click **OK**.

## CONDUCT YOUR MEETING

### *Live Desktop Video*

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**Q: What equipment do I need to use video?**

A: To be seen by other meeting participants, install a web camera before starting or joining a White Lion Meeting Edition meeting. Your web camera transmits live video of you to other participants during a meeting.

If you do not have a web camera, you can participate in a meeting and see other participants' video, but you are not able to send live video.

**Q: How do I know if my video is working?**

A: If your web camera is installed and on, you will see your live video displayed in the Meeting Bar.

**Q: Can I turn my live video off so participants cannot see me?**

A: Yes. Click the **double arrows** above the video window to collapse the Video controls.
The status will change from on air (transmitting video) to off air (not transmitting video).

**Q: How can I see other participants' video?**

A: In the Participants controls, select the name of the participant you want to view. Their video is displayed to you in the Video Task Group.

**Q: How can I see live video of the person speaking?**

A: Use the follow talker feature to display the live video of the meeting participant currently speaking. Other participants can override follow talker by selecting take podium, which then displays their video.

To follow talker:

1. In the Video Task Group, click **Video Options**.
2. Click **Follow Talker** and a check will appear to indicate you are now following the talker. To quit following the talker, click **Follow Talker** again to clear the check.

**Q: How do I know if someone is viewing my live video?**

A: To see who is watching the live video of another participant:

In your Private Workspace, select **Details** from the View drop-down menu. The Viewing column shows who that person is watching. When you take the podium, all participants are forced to view your live video.

**Q: What if I do not have a web camera?**

A: If you do not have a web camera, you can participate in a meeting and see other participants' video, but you are not able to send live video.

## *Presenting or Sharing Content*

**Q: What options do I have for presenting or sharing content?**

A: You can convert a document using Document Viewing, share an application using Application Sharing or share a browser using Browser Sharing.

**Q: Why should I convert a document in Document Viewing rather than share it using Application Sharing or Browser Sharing?**

A: Converting a document gives you the following benefits:

- Less bandwidth: minimal bandwidth is required for viewing.
- Quick retrieval: converted documents are stored in the My White Lion Documents directory for easy retrieval later.
- Easy access: converted and presented documents are saved in Meeting History for participants to view at any time during your meeting.

**Q: What are the benefits of Application Sharing or Browser Sharing?**

A: The benefits of sharing are:

- Quick presentations viewed on-the-fly; no conversion is necessary.
- Browser sharing is live, enabling real-time presentations.
- Any desktop application can be shared with participants.

## *Sharing an Application or Browser*

**Q: What is sharing an application or browser?**

A: You can present an application or web browser from your computer during a meeting. You can share a specific file, a selected region of your desktop or your entire desktop for other participants to view and annotate. If given permission, a meeting participant can do the same.

**Q: How do I share an application?**

A: To share an application:

1. In the Meeting Bar, click **Application Sharing**. Icons for open applications and desktop and region sharing icons are displayed in your Private Workspace.
2. Click any application icon to begin sharing that application, click **Share Desktop** to share your entire desktop or click **Share a Region** to select a specific region of your desktop for sharing.

**Q: How do I share a browser?**

A: To share a web page:

1. In the Meeting Bar, click **Browser Sharing**.
2. Enter a web address in the URL field displayed in your Private Workspace or choose a previously viewed web address from the drop-down menu.
   *You can take users to any web site, secure (password protected) or non-secure.*

## *Document Viewing*

**Q: Why do I need to convert my documents before presenting?**

A: Before you can present a file with Document Viewing, you must convert it. When a document is converted, it is saved as a White Lion document on your hard drive. Conversion does not change your original document; it simply saves it in a format that enables easier presentation during the meeting. You can convert documents before or during a meeting. A converted document can only be viewed while using White Lion Meeting Edition.

**Q: What types of documents can be converted?**

A: The following file types can be converted and presented in White Lion Meeting Edition: *.doc, *.ppt, *.vsd, *.xls, *.txt, *.pdf, *.prz, *.jpg, *.jpeg and *.bmp.

**Q: How do I convert a document?**

A: To convert a document:

1. In the Meeting Bar, click **Document Viewing**.
2. Click **Convert a Document**.
3. Select the file you want to convert and then click **Open**.
4. When conversion is complete, click **Open in Meeting** to immediately open the converted file for presentation in your Private Workspace or click **OK** to return to your meeting.

## *Recording*

Recording lets you capture a synchronized audio, web and video playback of your meeting. After the meeting, make the recording available to others for later playback.

**Q: How do I record a meeting?**

A: To record a meeting:

1. In the Meeting Bar, click **Recording Controls**.
2. Click **Start Recording**.
3. Enter a title for the recording.
4. Select **Include webcam video in recording** to include live video in the recording. Clear the checkbox to omit live video from your recording.
5. Click **Start Recording**.

When recording begins, **Recording In-Progress** will display above your Public Workspace and you will also hear "your conference is now being recorded" on the phone.

## *Question & Answer*

Question & Answer enables co-moderators, presenters and participants to ask text questions during a meeting, if given permission. Moderators, co-moderators and presenters can answer questions.

**Q: How do I know when a question is being asked?**

A: There are two ways to determine when a question is being asked.

1. When the Question & Answer feature is open, questions are displayed in your Private Workspace.
2. When the Question & Answer feature is not open, the Question & Answer option in the Meeting Bar will flash.

**Q: How do I answer a question using Question & Answer?**

A: To answer a question:

1. In the Meeting Bar, click **Question & Answer.** The Question & Answer interface appears in your Private Workspace.
2. Click a question in the Questions Outstanding box.
3. Enter an answer in the Answer box.
4. Click **Answer** to answer the question privately or click **Answer to All** to answer publicly.

## *Polling*

During a meeting you can gather real-time feedback from your participants and publish the polling results.

**Q: How do I ask a polling question?**

A: To ask a polling question:

1. In the Meeting Bar, click **Polling**. The Polling interface appears in your Private Workspace.
2. Select a question set.

3. Click **Open Poll**.

As meeting participants answer the polling question, their responses display in your Private Workspace. When you are ready, close the poll and publish the results.

**Q: How do I create or update a polling question set while in a meeting?**

A: To create or update a polling question set while in a meeting:

1. In the Meeting Bar, click **Polling**. The Polling interface appears in your Private Workspace.
2. Select either an existing question set to edit or choose **New Question Set** from the drop-down menu to create a new question set. Click **Edit Question Set.**
3. Create or update the question set.
4. Click **Save**.

## *Chat*

Chat enables you to exchange text messages with all meeting participants, moderators, co-moderators or specific participants.

**Q: How do I chat with participants?**

A: To chat with individual participants:

1. In the Meeting Bar, click **Chat**. The Chat dialog box opens.
2. Choose an appropriate recipient for your message.
3. Enter your message in the text entry field at the bottom of the Chat dialog box.
4. Click **Send**.

Your message is displayed in the upper area of the Chat dialog box. When you receive a message, it is posted in the same area.

## *Annotation*

**Q: Can I annotate a presentation or shared application?**

A: Yes. You can select an annotation tool to draw or write notes while whiteboarding, presenting a document or when application sharing or browser sharing is paused.

**Q: What is Meeting History?**

A: Meeting history displays presented whiteboards, presentation slides or any other converted document that has been presented in your meeting.

To view Meeting History in your meeting:

1. On the Meeting Bar, click **Document Viewing**.
2. Select **Meeting History** from the drop-down menu in your Private Workspace.

## *Force Fullscreen*

For even more control over a participant's view, you have the option of forcing all participants into full-screen mode.

To force full screen for your participants, click the **force full screen** icon. To return your participants' screens to the normal view, click the **force normal** icon.

## POST-MEETING ACTIVITIES

### *Reports*

Reports are available within your content management pages and allow you to access information about your meetings.

**Q: How do I generate a report?**

A: To generate a report:

1. Click **Reports** in your content management pages.
2. Select a date range.
3. Choose a report type.
4. Apply a filter.
5. Click **Run Report**.

### *Recording*

**Q: How do I make my recorded meeting available to others?**

A: There are two ways to make your recorded meeting available to others:

1. Send an e-mail containing a playback link.
2. Download the recorded meeting and Raindance player.

**Q: How do I send out a playback link from my content management pages?**

A: To send a playback link:

1. Click **Recorded Meetings** in your content management pages.
2. Click the envelope icon next to the meeting for which you want a link. You will receive a link via e-mail and can then forward it to recipients.

**Q: How do I download a recorded meeting from my content management pages?**

A: To download a recorded meeting:

1. Click **Recorded Meetings** in your content management pages.
2. Click the orange arrow icon next to the meeting you want to download.
3. View confirming information on the following page and click **Download Recording**.
4. Click **Save** in the file download dialog box.
5. Select a location to save the recording and click **Save**.

The Raindance player is needed to playback a downloaded White Lion meeting.

**Q: How do I play back a recorded meeting from my content management pages?**

A: To play back a recorded meeting:

1. Click **Recorded Meetings** in your content management pages.
2. Click the green arrow icon next to the recording you want to play back.
3. If the recording is password-protected, enter the password.
4. Choose your network connection speed by clicking **Low**, **Medium** or **High**.
5. Click **Play Recorded Meeting**. The Raindance player displays and the recording begins to play.

## PARTICIPATE IN A MEETING

**Q: How do participants join a meeting?**

A: There are three ways participants can join a White Lion meeting:

1) Once White Lion is installed, double click the Raindance desktop icon.

   1. Click **Join a Meeting**.
   2. Enter the conference ID provided by the moderator or select a previously entered conference ID from the drop-down menu.
   3. Click **Join Meeting**. Participants are either placed directly into the meeting or are instructed to wait for the moderator.

2) An e-mail invitation:

   1. Click the meeting link in the e-mail invitation.
      *If participants accepted an Outlook meeting request, they must open the appointment in their calendars and click the link.*
   2. Enter the required information and the conference ID provided by the moderator.
   3. Select either the full version or light version depending on individual operating systems and/or bandwidth.
   4. Click **Join Meeting**.

3) The White Lion web site: ***************************************************************

   1. Go to http://www.raindance.com and click **Join a Call/Meeting**
   2. Enter the required information and the conference ID in the Raindance Meeting Edition box.
   3. Select either the full version or light version depending on individual operating systems and/or bandwidth.
   4. Click **Join Meeting**.

In any of the above cases, when the moderator arrives, participants are prompted to select or enter a phone number to join the phone portion of the meeting. Participants are called at this phone number and joined into the phone portion of meeting.

**Q: How do I assign a new role or set custom permissions for a specific participant in a meeting?**

A: To assign a new role or set custom permissions for a meeting participant:

1. In the Meeting Bar, click **Participant Details**. A list of participants appears in your Private Workspace.
2. Right-click the participant's name and click **Permissions**.
3. Choose a new role (co-moderator, presenter or participant) or select check boxes to add permissions or clear check boxes to take away permissions.

These permissions and roles apply only to your current meeting. When you start a new meeting, the default role you specified in your profile is assigned to those participants.

**Q: How do I join participants into the phone portion of a meeting?**

A: When you start the phone portion of the meeting, participants are prompted to verify a phone number where they will be called. You do not need to manually call participants.

**Q: How do I dial out to a participant from within a meeting?**

A: To dial out to a participant:

1. In the Meeting Bar, click **Participant Details**. A list of participants appears in your Private Workspace.
2. Right-click on the participant's name in your Private Workspace, then click **Call**.
3. Select or enter a phone number.
4. Click **OK**.

**Q: How do I mute and unmute participants' phones?**

A: To mute all participants' phones, click the mute all audio icon in the main toolbar at the top of the application. To unmute all participant phones, click the **unmute audio** icon.

To mute or unmute individual participant phones:

1. In the Meeting Bar, click **Participant Details**.
2. Right-click on a participant's name in your Private Workspace, then click **Mute** or **Unmute**.

**Q: How do participants connect to the phone portion of a meeting after they've joined online?**

A: To join the phone portion of a meeting:

If the moderator has already started the phone portion, participants are prompted to select or enter a phone number where they will be called. Or, they can dial into the meeting. In the Meeting Bar, click **Meeting Information** then click **Dial-In Instructions**. Follow the instructions.

If the moderator has not started the phone portion when participants join online, they will be able to request that the meeting call them once the moderator arrives. In the Meeting Bar, click **Phone Controls**. The Phone Controls Task group appears. Click **Join Phone Conference**.