IBM Sametime 8.5.2 Meetings Task Reference

IBM® Sametime® meetings take place in meeting rooms. Learn how to get up and running with Sametime meetings. Then, get started creating and managing meeting rooms using the IBM Sametime and IBM Lotus Notes® **Sametime Meetings** panel and the IBM Sametime Meeting Room Center. Meeting rooms open in either a Sametime window or a web browser.

Set up and get started with Sametime meetings!

Read below to set up and get started with Sametime meetings in five easy steps. Then find the section for the meeting room that you are using to get started with basic and more advanced tasks for managing and participating in meetings, or find the section for the client you are using to get started creating and managing meeting rooms.

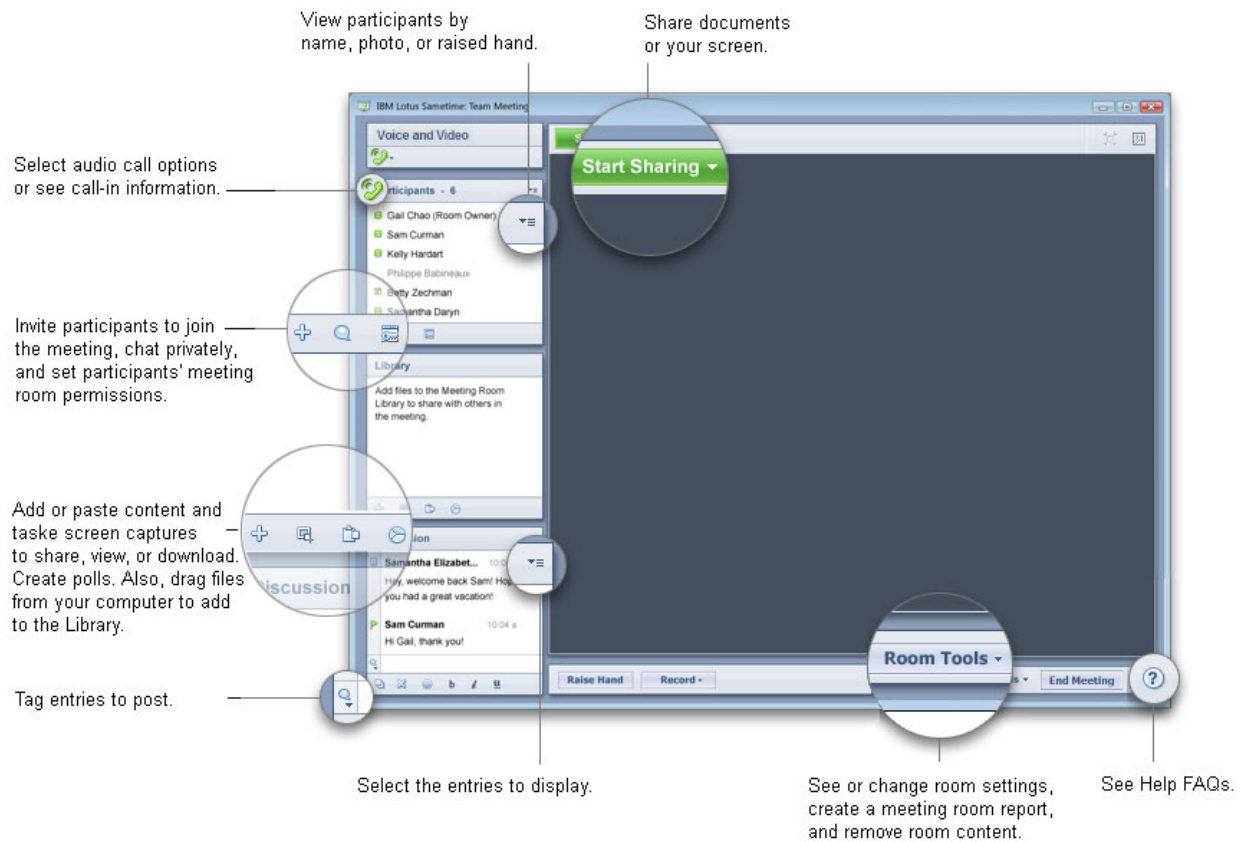*Table 1. Five easy steps to setting up and starting a Sametime meeting*

Steps	Actions
1. Create a meeting room, if you don't already have one.	From IBM Sametime Connect or IBM Lotus Notes: • Click the **Sametime Meetings** panel and then click . Complete the fields for the new meeting room and then click **OK**. From the IBM Sametime Meeting Room Center: • Click **New Meeting Room**. Complete the fields for the new meeting room and then click **OK**. **Note:** You must be logged in to the Meeting Room Center to create new meeting rooms.
2. Add the meeting room to your calender invitation.	Add the meeting room web address (URL) to any calendar invitation. From Sametime Connect or Lotus Notes: • Click the **Sametime Meetings** panel and then click to select a view with your meeting rooms, such as **My Meetings**. Click the meeting room for your meeting and then drag it into the **Description** field of your calendar invitation. The web address (URL) for the meeting room is added to the calendar invitation. **Note:** If your meeting room uses a password, be sure to also include the password in the calendar invitation so that people can join the meeting room. From the Sametime Meeting Room Center: • Click **Copy Link** for the meeting room and then click **Ctrl + C** to copy the link to the clipboard. Click **Ctrl + V** to paste it into your calendar invitation. **Note:** If your meeting room uses a password, be sure to also include the password in the calendar invitation so that people can join the meeting room.

Table 1. Five easy steps to setting up and starting a Sametime meeting (continued)

Steps	Actions
3. Bring other people into the meeting room after the meeting is running.	From within a meeting room: • Click **Room Tools** > **View Room Information** in the global toolbar, copy the meeting room web address (URL) and then paste it into a calendar invitation, email, or chat window to send to others. Use this method to invite people who are not online. **Note:** If your meeting room uses a password, be sure to also include the password so that people can join the meeting room. If you are in a meeting room that opens in a Sametime window, you can also: • Click the plus sign (+) in the meeting room Participants List, and search for online users to invite into the meeting room. • Drag and drop one or more Sametime contacts who are online on your contact list into the meeting room. These individuals will get an invitation to join the meeting.
4. Add files to share during the meeting.	You add files to the Library to share from within a meeting room. In the meeting room Library, click and select the file to add. You can add more than one file. **Note:** For meeting rooms that open in a Sametime window, you can also drag one or more files from your computer directly into the meeting room Library.
5. Start sharing.	In a meeting room, click **Start Sharing** and select what you want to share, including any files you added to the meeting room Library.

Work with meetings that open in a Sametime window

View participants by name, photo, or raised hand.

Share documents or your screen.

Select audio call options or see call-in information.

Invite participants to join the meeting, chat privately, and set participants' meeting room permissions.

Add or paste content and taske screen captures to share, view, or download. Create polls. Also, drag files from your computer to add to the Library.

Tag entries to post.

Select the entries to display.

See or change room settings, create a meeting room report, and remove room content.

See Help FAQs.

Read this section to get started with basic tasks for managing and participating in meeting rooms that open in a Sametime window. For these tasks, you must be in a meeting room.

Table 2. Basic tasks for meeting rooms that open in a Sametime window

How do I?	Action
Start sharing?	Do one of the following actions: • If no one is sharing, click **Start Sharing** in the sharing area. • If someone else is already sharing, click **Let Me Share** in the sharing area. Click what you want to share.
Stop sharing?	Click **Stop Sharing** in the sharing toolbar.
Change the display size of what is being shared?	In the sharing toolbar, click one of these icons: • ▣ to display what is being shared in its original size. • ▣ to scale what is being displayed to fit in the shared area. • ▨ to maximize the shared content.

Table 2. Basic tasks for meeting rooms that open in a Sametime window (continued)

How do I?	Action
Add files to share?	Do one of the following actions: • In the Library, click one of the available icons, such as ⊕ , and select what you want to add. • Drag a file from your computer directly into the Library.
Invite others to join the meeting in progress?	Do one of the following actions: • In the Participants list, click ⊕ . • Drag and drop one or more contacts who are online on your contact list into the meeting room. These individuals will get an invitation to join the meeting.
Chat privately with another participant?	Double-click the name of an online and available person in the Participants list.
Chat with all meeting room participants?	In the Discussion area of the meeting room, click 💬 and then enter your chat message.
View meeting room information, such as the web address (URL) for the meeting room?	In the global toolbar, click **Room Tools** > **View Room Information**.
See the call-in information to call in to the audio call using my telephone?	Click **Show call-in information** in the Voice and Video area of the meeting room.
Start a conference call? (For meeting room owners or presenters, if this feature is available.)	In the **Voice and Video** area of the meeting room, select an option, depending on the call capabilities available to you.
Join a conference call? (For meeting room participants, if this feature is available.)	In the **Voice and Video** area of the meeting room, select an option, depending on the call capabilities available to you..
Use video in a meeting room? (If this feature is available to you.)	Click 👣 in the **Voice and Video** area of the meeting room. **Note:** The meeting room owner or manager must click 👣 first.
Leave a meeting?	Click the **X** in the upper-right corner of the meeting room.
End a meeting?	Click **End Meeting** in the meeting room global toolbar.

Read this section to get started with more advanced tasks for managing and participating in meeting rooms that open in a Sametime window. For these tasks, you must be in a meeting room.

Table 3. Advanced tasks for meeting rooms that open in a Sametime window

How do I?	Action
Check whether someone else can share?	In the Participants list, click the Set Permissions icon 🖼 and see who appears under **Who can share content**.
Let someone else share?	Any presenter in the meeting room can click **Let Me Share**, even while someone else is sharing.
Remove someone from a meeting? (Meeting room owner or managers only.)	Participants list, right-click a name and then click **Remove from Room**.

Table 3. Advanced tasks for meeting rooms that open in a Sametime window (continued)
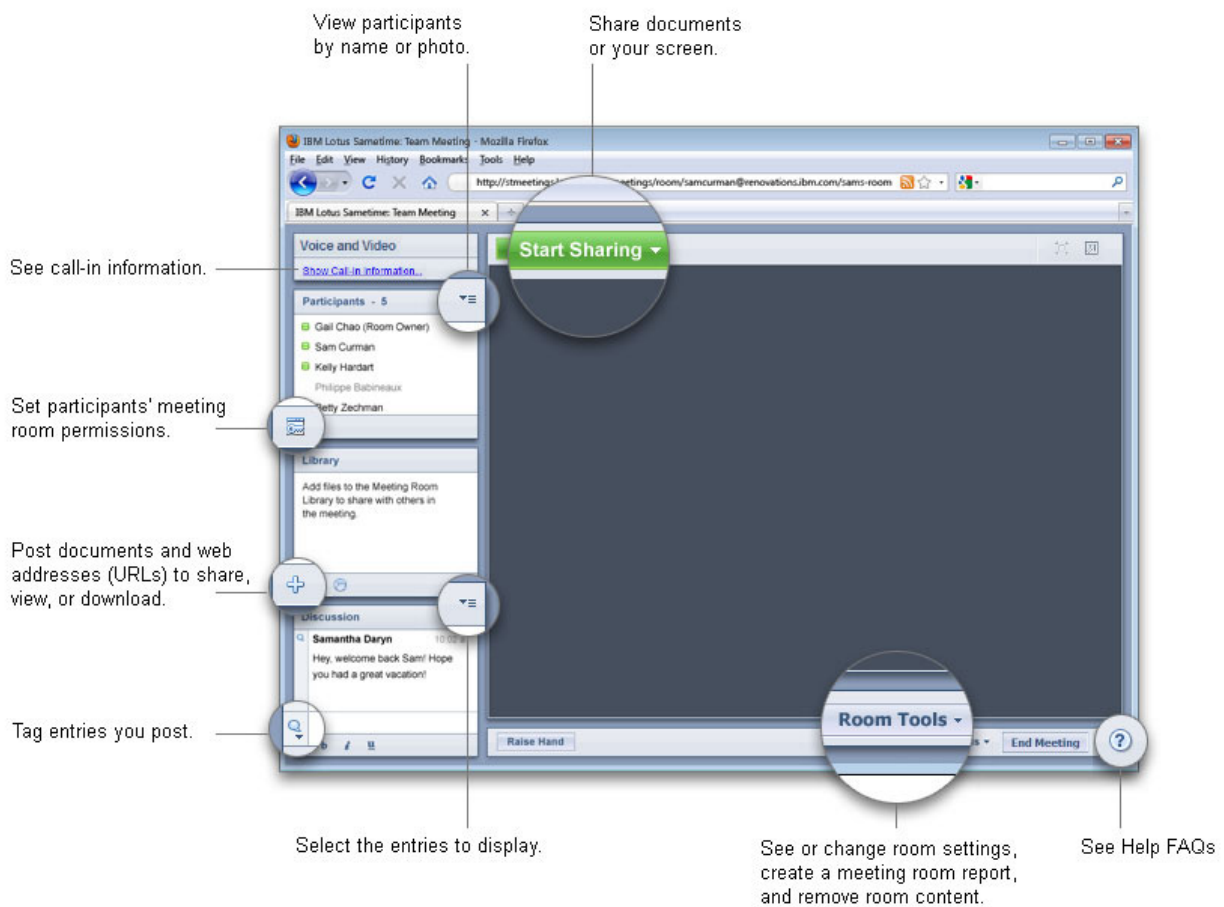
How do I?	Action
See different views of the Participants list?	In the Participants list, click ⬛ and select how to display meeting attendees, such as by their names or photos.
View details about items stored in the library?	Click an item stored in the Library to select it. Then click ⬇ and click **View Details**.
Set meeting room permissions? (Meeting room owner or managers only.)	In the Participants list, click the Set Permissions icon ⬛ and select the roles and actions for individuals or all room participants.
Edit meeting room information?	In the global toolbar, click **Room Tools** > **Change Room Settings**.
Change conference call-in information for a meeting room?	Do one of the following actions: • If you are using Sametime Connect, click **File** > **Preferences**. • If you are using Lotus Notes, click **File** > **Preferences** and then click the plus sign (+) beside **Sametime** in the navigator. Then click **Voice and Video** > **Service Providers**.
Use the **Sametime Audio/Video Conferencing** option for a meeting room? (If this feature is available to you.)	In the global toolbar, click **Room Tools** > **Change Room Settings** and then click **Voice and Video**. Select **Sametime Audio/Video Conferencing**.
Create a new service provider option for meeting rooms, such as a new call-in telephone number and passcode?	You create a new service provider option from Sametime Connect or Lotus Notes. Do one of the following actions: • If you are using Sametime Connect, click **File** > **Preferences**. • If you are using Lotus Notes, click **File** > **Preferences** and then click the plus sign (+) beside **Sametime** in the navigator. Then click **Telephony, Audio and Video** > **Connection and Conference Settings**.
Create and send a poll?	In the Library, click the Add Poll con ⬛ .
View and save poll results?	In the Poll Results dialog box, click **Save Results and Close**.
Capture meeting minutes and action items?	In the Discussion area of the meeting room, click ⬛ to add meeting minutes or ⬛ to add action items and then type your entry.
Create an attendance report?	In the global toolbar, click **Room Tools** > **Create Meeting Report**. **Note:** Attendance is included in the meeting report.
Create a meeting report?	In the global toolbar, click **Room Tools** > **Create Meeting Report**.
Set up a lecture-style meeting for a large number of participants?	In the global toolbar, click **Room Tools** > **Change Room Settings**. Under **Large Meeting Support**, select **Optimize this room for large meetings**.

Table 3. Advanced tasks for meeting rooms that open in a Sametime window (continued)

How do I?	Action
Rearrange the areas in the meeting room?	Click the Voice and Video, Participants list, Library, or Discussion area of the meeting room and drag it to another location in the window. Double-click the title bar of the Voice and Video, Participants List, Library, or Discussion areas to reduce that area to just its title bar, and double-click the title bar again to expand it.
Drag the Voice and Video, Participants list, Library, and Discussion areas of the meeting room into separate floating windows?	Click the Voice and Video, Participants List, Library, or Discussion area of the meeting room and drag it out of the meeting room so that it is in a separate, floating window. To return the window to the meeting room, select the window by clicking the title bar of the window (where the title appears), and then drag it back into the room.
Remove all content from a meeting room?	In the global toolbar, click **Room Tools** > **Remove Room Content**.
Delete a meeting room?	Meeting room owners and managers can delete a meeting room from Sametime Connect or Lotus Notes. Do one of the following actions: • Click the **Sametime Meetings** panel and then click a meeting room to select it. Click **More Actions** > **Delete Room**.
Record a meeting?	In the global toolbar, click **Record**.
Set recording preferences	Do one of the following actions: • If you are using Sametime Connect, click **File** > **Preferences**. • If you are using Lotus Notes, click **File** > **Preferences** and then click the plus sign (+) beside **Sametime** in the navigator. Then click **Sametime Meeting Rooms** > **Recording**.

Work with meetings that open in a web browser

View participants by name or photo.

Share documents or your screen.

See call-in information.

Set participants' meeting room permissions.

Post documents and web addresses (URLs) to share, view, or download.

Tag entries you post.

Select the entries to display.

See or change room settings, create a meeting room report, and remove room content.

See Help FAQs

Read this section to get started with basic tasks for managing and participating in meeting rooms that open in a web browser. For these tasks, you must be in a meeting room.

Table 4. Basic tasks for meeting rooms that open in a web browser

How do I?	Action
Start sharing?	Do one of the following actions: • If no one is sharing, click **Start Sharing** in the sharing area. • If someone else is already sharing, click **Let Me Share** in the sharing area. Click what you want to share.
Stop sharing?	Click **Stop Sharing** in the sharing toolbar.
Change the display size of what is being shared?	In the sharing toolbar, click one of these icons: • ▣ to display what is being shared in its original size. • ▣ to scale what is being displayed to fit in the shared area. • ▨ to maximize the shared content.

Table 4. Basic tasks for meeting rooms that open in a web browser (continued)

How do I?	Action
Add files to share?	In the Library, click ➕ and select what you want to add.
Invite others to join the meeting room?	Click **Room Tools** > **View Room Information** and copy the meeting room web address (URL) to paste into a calendar invitation, email, or chat window to send to others.
Chat privately with another participant?	Double-click the name of an online and available person in the Participants list.
Chat with all meeting room participants?	In the Discussion area of the meeting room, click 💬 and then enter your chat message.
View meeting room information, such as the web address (URL) for the meeting room?	In the global toolbar, click **Room Tools** > **View Room Information**.
See the call-in information to call in to the audio call using my telephone?	Click **Show call-in information** in the Voice and Video area of the meeting room.
Leave a meeting?	Click the **X** in the upper-right corner of the meeting room.
End a meeting?	Click **End Meeting** in the meeting room global toolbar.

Read this section to get started with more advanced tasks for managing and participating in meeting rooms that open in a Web browser. For these tasks, you must be in a meeting room.

Table 5. Advanced tasks for meeting rooms that open in a web browser

| How do I?	Action
Check whether someone else can share?	In the Participants list, click the Set Permissions icon 🖼️ and see who appears under **Who can share content**.
Let someone else share?	Any presenter in the meeting room can click **Let Me Share**, even while someone else is sharing.
Remove someone from a meeting? (Meeting room owner or managers only.)	Participants list, right-click a name and then click **Remove from Room**.
See different views of the Participants list?	In the Participants list, click ⬇️≡ and select how to display meeting attendees, such as by their names or photos.
View details about items stored in the library?	Click an item stored in the Library to select it. Then click ⌄ and click **View Details**.
Set meeting room permissions? (Meeting room owner or managers only.)	In the Participants list, click the Set Permissions icon 🖼️ and select the roles and actions for individuals or all room participants.
Edit meeting room information?	In the global toolbar, click **Room Tools** > **Change Room Settings**.
View poll results?	See the poll results posted to the Discussion area of the meeting room.
Capture meeting minutes and action items?	In the Discussion area of the meeting room, click 🔲 to add meeting minutes or 🚩 to add action items and then type your entry.

Table 5. Advanced tasks for meeting rooms that open in a web browser (continued)

How do I?	Action
Create an attendance report?	In the global toolbar, click **Room Tools** > **Create Meeting Report**. **Note:** Attendance is included in the meeting report.
Create a meeting report?	In the global toolbar, click **Room Tools** > **Create Meeting Report**.
Set up a lecture-style meeting for a large number of participants?	In the global toolbar, click **Room Tools** > **Change Room Settings**. Under **Large Meeting Support**, select **Optimize this room for large meetings**.
Remove all content from a meeting room?	In the global toolbar, click **Room Tools** > **Remove Room Content**.
Delete a meeting room?	Meeting room owners and managers can delete a meeting room from the Sametime Meeting Room Center. • In the My Meeting Rooms view, for the meeting room you want to delete, click **More Actions** > **Delete**.
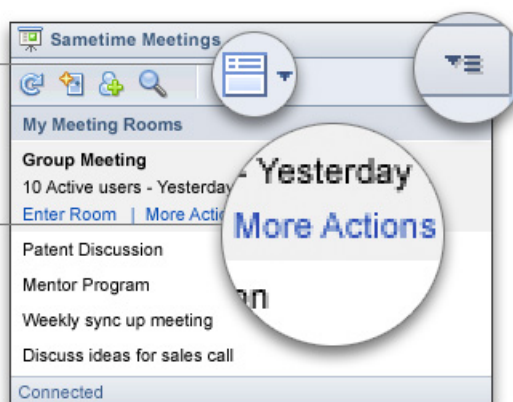
Sametime Meetings panel

Read this section to get started creating and managing meeting rooms using the Sametime Connect or Lotus Notes **Sametime Meetings** panel. If this feature is available to you, you can also work with your scheduled meetings from the **Sametime Meetings** panel.

Table 6. Sametime Meetings panel tasks

How do I...	Action
Create a meeting room?	Click the **Sametime Meetings** panel and then click .

Table 6. Sametime Meetings panel tasks (continued)

How do I...	Action
Find a meeting room?	Click the **Sametime Meetings** panel. • If you are the meeting room owner, click and select **My Meeting Rooms** to see a list of your meeting rooms. • If you are not the meeting room owner, click and enter the meeting room or owner name. **Note:** If you see **Servers** at the end of this list, this means that your company has multiple servers for meetings rooms. Make sure that you select the correct server for the meeting room you want.
Find a hidden meeting room?	Click the **Sametime Meetings** panel. • If you are the meeting room owner, click and select **My Meeting Rooms** to see a list of your meeting rooms. • If you are not the meeting room owner, click and enter the entire meeting room or owner name. **Note:** If you see **Servers** at the end of this list, this means that your company has multiple servers for meetings rooms. Make sure that you select the correct server for the meeting room you want.
See my meetings scheduled for today and tomorrow? (If this feature is available to you.)	Click the **Sametime Meetings** panel and then click and select **Scheduled Meetings**.
View information about a scheduled meeting? (If this feature is available to you.)	Click the **Sametime Meetings** panel and then click and select **Scheduled Meetings**. Right-click (or Ctrl + click on Macintosh) the scheduled meeting and then click **View Meeting Information**.
Organize my list of meeting rooms?	Click the **Sametime Meetings** panel and then click to select which meeting rooms to display. **Note:** Some meeting room views might not be available to you.
Invite others to join the meeting before it starts?	Click the **Sametime Meetings** panel and then click and find the meeting room you want. Click and enter the names of the people you want to invite or drag online names from your contact list directly into the invitees list.
Find a link to a meeting room to send to others?	Click the **Sametime Meetings** panel and find the meeting room. Click the meeting room and then click **More Actions** > **Copy Link to Clipboard**.
Edit meeting room settings?	Click the **Sametime Meetings** panel and then click the meeting room. Click **More Actions** > **Edit**.

Table 6. Sametime Meetings panel tasks (continued)

How do I...	Action
Add the meeting room to my calender entry?	Add the meeting room web address (URL) to any calendar entry. From Sametime Connect or Lotus Notes: • Click the **Sametime Meetings** panel and then drag the meeting room into the **Description** field of your calendar invitation. The web address (URL) for the meeting room is added to the calendar invitation. **Note:** If your meeting room uses a password, be sure to also include the password in the calendar invitation so that people can join the meeting room. In Microsoft Outlook with IBM Sametime 8.5, when you schedule a new meeting in Microsoft Outlook, on the **Sametime** tab, select **Include an IBM Sametime online meeting** and complete the appropriate fields. **Note:** To include a meeting room with a meeting scheduled using a Microsoft Outlook calendar, you must first install the Microsoft Outlook plug-in that comes with Sametime Connect release 8.5.
Start an instant meeting? (If this feature is available to you.)	First, set your **Sametime Meeting Rooms** > **Meeting Room Invitations** preferences to use an instant meeting room or prompt you to select a meeting room. Then, do one of the following actions in an open chat window or for a selected contact: • In Sametime Connect, click **Tools** > **Invite to Instant Meeting Room** • In Lotus Notes, click **Tools** > **Sametime** > **Invite to Instant Meeting Room**

Sametime Meeting Room Center

If searching for hidden meeting rooms is allowed, select the scope of the search.

Search for meeting rooms owned or managed by others.

Click a column head to sort the list of your meeting rooms.

Expand to see the meeting room details

Read this section to get started creating and managing meeting rooms using the Sametime Meeting Room Center.

Table 7. Sametime Meeting Room Center tasks

How do I...	Action
Create a meeting room?	Click **New Meeting Room**. **Note:** You must be logged in to the Meeting Room Center to create new meeting rooms.
Find a meeting room?	Select the scope of the search (if this feature is available to you). Then enter the meeting room name or owner. **Note:** You might need to be logged in to search for meeting rooms.

Table 7. Sametime Meeting Room Center tasks (continued)

How do I...	Action
Find a hidden meeting room?	Enter the exact meeting room name. You might need to be logged in to search for meeting rooms. **Note:** If your administrator allows hidden meeting rooms to be displayed in search results and you don't own or manage the meeting room, you must enter the exact name of the hidden meeting room to display it in the search results. If your administrator does not allow hidden rooms to be displayed in search results, you cannot search for hidden meeting rooms. Instead, you must have the web address (URL) for the meeting room to join it.
Organize my list of meeting rooms?	Click the **Meeting Room Name**, **Owner**, **Active**, or **Last Accessed** column heads to sort the list of your meeting rooms.
Invite others to join a meeting room?	In the **My Meeting Rooms** list, find the meeting room to which you want to invite others. Click **Copy Link** and then click **Ctrl + C** to copy the link to the clipboard.
Find a link to a meeting room to send to others?	In the **My Meeting Rooms** list, find the meeting room. Click **Copy Link** and then click **Ctrl + C** to copy the link to the clipboard.
Edit meeting room settings?	In the **My Meeting Rooms** list, find the meeting room. Then click **More Actions** > **Edit**.
Add the meeting room to my calender entry?	From the Sametime Meeting Room Center: • Click **Copy Link** for the meeting room and then click **Ctrl + C** to copy the link to the clipboard. Click **Ctrl + V** to paste it into your calendar entry.