



Session Administration System

New User's Guide

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Chapter 1 How to Use This Guide

Who should read this guide

This guide is written for Session Administration System (SAS) Managers, Administrators and Supervisors who are new to the SAS. (For descriptions of these roles, see [Registered SAS users](#).) It provides the conceptual framework you need to understand how to use the SAS to create and manage Elluminate *Live!* sessions and users. It also introduces you to the SAS interface.

Although SAS Managers, Administrators and Supervisors need not be computer experts, this guide assumes its readers possess some basic computer literacy.



Note: this guide is not meant to be exhaustive – more detailed information will be provided in future guides.

How this guide is organized

This guide contains two main sections:

- **Introduction to SAS concepts** provides the conceptual framework you need to understand how to use the SAS and manage Elluminate *Live!* sessions and users.
- **The SAS interface** gives a high-level overview of the various elements in the SAS user interface.

Conventions used in this guide

The following notations are used in this guide to highlight important information.



This is a note. Notes are used to highlight important information or to present asides relevant to the topic at hand.



This is a tip. Tips provide helpful information on how to most effectively use a particular function in the SAS.



This is a caution. Cautions alert you to potentially confusing terminology or difficulties that may occur when using the SAS.



This is a warning. Warnings alert you to potentially very serious problems.

The ability to use particular functions in the SAS is dependant upon the role of the user and the [privileges](#) granted to the user. The following conventions are used to indicate which user roles, by default, are able to access the function being described.



M

Denotes functions that can be accessed by the Manager only.



MA

Denotes functions that can be accessed by the Manager and Administrators only.



MAS

Denotes functions that can be accessed by the Manager, Administrators and Supervisors only.



AS

Denotes functions that can be accessed by Administrators and Supervisors only.



Mod. & P

Denotes functions that can be accessed by Moderators and Participants only.



Chapter 2 Introduction to SAS concepts

The Elluminate *Live!* Session Administration System (SAS) is a powerful tool that enables you to manage your Elluminate *Live!* users and sessions, whether you are part of a corporation or an academic institution. You can schedule sessions, register users and invite them to sessions, preload multimedia, session plan and whiteboard files into sessions, facilitate the recording of sessions so others can view them later, generate usage reports and manage your own disk space on the Elluminate *Live!* server.

 The SAS is a powerful, richly featured, product. In order to clearly introduce SAS concepts, this section does **not** discuss all possible uses of all features – it presents only simple examples of typical SAS use. As you become more experienced with the SAS, you will find many more sophisticated ways to use the system.

Registered SAS Users

Five different user roles can be registered within, and log into, the SAS. Each role is defined by its unique responsibilities and [user privileges](#). The relationship between these user roles is hierarchical, as depicted in Figure 1.

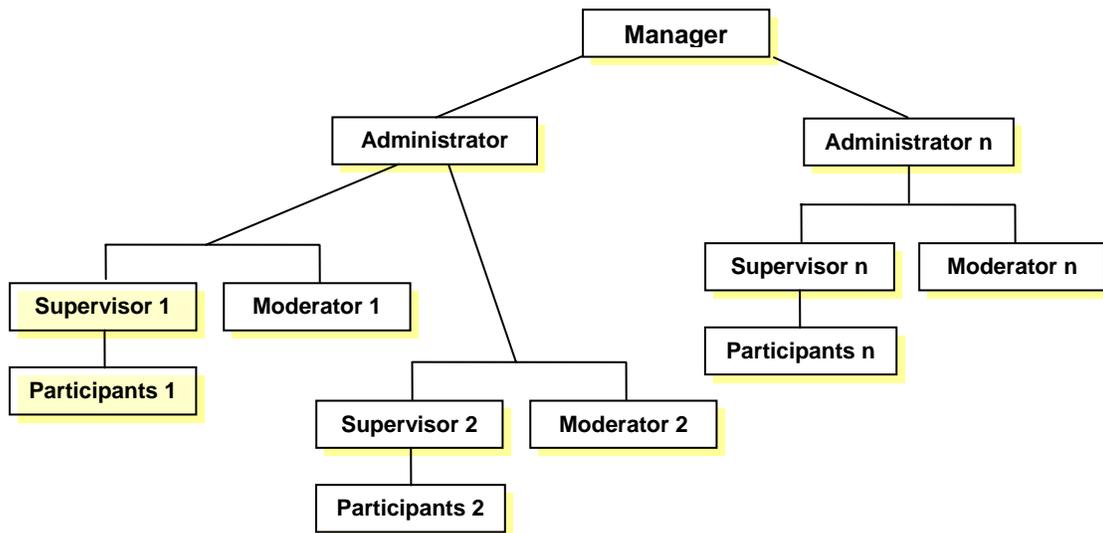


Figure 1: SAS Role Hierarchy

Typically, there is only one Manager role in an organization; however, there can be any number of Administrators, Supervisors, Moderators and Participants.

The Manager

Elluminate provides a single Manager account per client site and that Manager is the first user to log in to the SAS. The Manager is the overall administrator of Elluminate *Live!* in your organization.

Whom you assign to the Manager role will depend on your unique needs; however, it should be someone with a stake in your organization-wide use of the SAS.

Although the Manager can create new sessions and users, the Manager does not “own” any Elluminate *Live!* sessions and users – the Manager creates user accounts for Administrators and Supervisors who own the sessions and users.



Ownership means that a specific SAS user is responsible for administrating a session (inviting or enrolling users, restricting access to sessions, setting session options, etc.) or user (granting user privileges, deleting user accounts, etc.).

The Manager has all SAS [privileges](#) available to Administrators and Supervisors, as well as the additional privileges required to create Administrator accounts and customize the Elluminate *Live!* environment.

Administrators

The Manager can create multiple Administrator accounts. It is the responsibility of Administrators to administrate Meetings, Courses and Drop-Ins (see [Types of Sessions](#)) and user accounts (Supervisors, Moderators and Participants). Those you designate as SAS Administrators should be people who will be responsible for creating Courses and Drop-Ins in your organization.



When rolling out Elluminate *Live!* across multiple departments or faculties on an enterprise-wide level, you may wish to have separate Administrator accounts for each department and make each Administrator responsible for creating their own courses and users for their respective departments or faculties.



Supervisors

The Manager or Administrators can create multiple Supervisor accounts. Supervisors can enroll Participants into Courses and create and manage Meetings (but not Courses or Drop-Ins). Although Supervisors cannot actually create Participant accounts, every Participant is assigned to a Supervisor; therefore, a minimum of one Supervisor account is required in the SAS. Assign the Supervisor role to those people who will be directly responsible for managing Participant accounts.

Moderators

The Manager or Administrators can create multiple Moderator accounts. Moderators typically (but not necessarily) act as session leaders, such as teachers of Courses, supervisors of Drop-Ins or chairs of Meetings.

Moderator versus chair



Caution! Do not confuse the Moderator **user role** with the chair **privilege**.

It is possible to have multiple users (including Administrators, Supervisors, Moderators and Participants) act as [chairs](#) in a particular Elluminate *Live!* session. This is done by granting users the [chair privilege](#) for a session.

What distinguishes a Moderator chair from a Participant chair is that individual Moderators can chair Courses, Drop-Ins and Meetings – typically, individual Participants can chair Meetings only.¹

Participants

The Manager or Administrators can create multiple Participant accounts. Participants' use of the SAS is very limited – they can log in to attend sessions, play recorded sessions and manage their user profile information. Registered Participants may or may not be granted the [chair privilege](#) for a Meeting session.

¹ There are two exceptions: Participants can be chairs of Courses and Drop-Ins if the “All Participants are Chair” flag is set for the sessions or if, within the session, an existing Moderator promotes a Participant to Moderator.

User terminology

Owner

An owner is an SAS user who is responsible for administrating a session or user.

Session ownership entails tasks such as inviting or enrolling users, restricting access to sessions, setting session options, etc. Administrators and Supervisors own sessions that they create themselves or sessions created on their behalf by the Manager or another Administrator. Administrators own Course templates, Course instances, Course sessions, Drop-In templates, Drop-In sessions and Meeting sessions. Supervisors own Meeting sessions only.

User ownership entails tasks such as granting user privileges, deleting accounts, etc. Supervisors own users.

Moderators and Participants do not own anything.

Host

A host is the person, department or organization who is sponsoring a session. By default, the owner of the session is the host. However, host is a display value only and the value can be changed to name anyone, including someone who is not a registered SAS user – such as a visiting guest speaker.

By default, invitation and notification emails (notifying users of new sessions) include the host's name.

Chair

A chair is anyone who has been granted the [chair privilege](#) for Elluminate *Live!* sessions. For registered SAS users, chair privileges can be granted in advance of the session. The chair privilege also can be granted to users within the Elluminate *Live!* session by an existing chair, including to unregistered users who join sessions as Guests.

Only Administrators, Supervisors and Moderators can be chairs of Courses and Drop-Ins.² All users, including all registered SAS users and unregistered users (who join sessions as Guests) can chair Meetings.

² There are two exceptions: Participants can be chairs of Courses and Drop-Ins if the “All Participants are Chair” flag is set for the sessions or if, within the session, an existing Moderator promotes a Participant to Moderator.



Contact

Contacts are individuals who are listed within the SAS database (with name, email address, etc.) but who are not “registered” with user name or password for logging in to the SAS. They can be invited to Drop-Ins and Meetings via email (just as registered SAS users can be) and attend sessions by clicking on a link in an email invitation.

Enrollee

An Enrollee is a Participant who has been enrolled in a Course. The Manager, Administrators, Supervisors and Moderators cannot be Enrollees – only Participants can be enrolled in Courses.

Guest

A Guest is anyone who attends a session by clicking on a [guest link](#). Guests can learn about the guest link a number of ways – through word of mouth, from a website, in a newsletter, from a posting in their Learning Management System, etc.

Guests are typically people external to the SAS, however, SAS registered users and SAS Contacts can also attend sessions as Guests.

Invitee

An Invitee is anyone who has been explicitly invited to a Drop-In or Meeting. Anyone – including registered SAS users, SAS Contacts as well as people *not* listed in the SAS database – can be invited to a Drop-In or Meeting.

Attendee

An Attendee is anyone who has attended a session, whether they are registered SAS users, SAS Contacts or Guests.

What users can do in the SAS

Only registered SAS users can log in to and use the SAS. Which tasks they are able to perform depends on two things: their user role and the privileges granted to them by a Manager, Administrator or Supervisor.

User privileges

When you create (or edit) user accounts in the SAS, you are given the option of granting users the ability to perform certain tasks. (In other software applications, user privileges are sometimes called rights or permissions.) For example, by default, Supervisors have the ability to modify all their own personal login information (username, password, display name, email address, mailing address, etc.); create, manage and enroll Participants; create and manage Meetings; and upload user, contact, whiteboard, session plan and multimedia files.



The Manager can alter the system defaults for user privileges. Whatever the defaults are, they can be overridden on a case-by-case basis when new SAS user accounts are created.

In the example below, Supervisor-Jim's Administrator (using the Supervisor Advanced Settings dialog) has taken away Supervisor-Jim's privileges to manage Participants (including passwords) and upload user files. Jim can still modify his personal login information, create and manage meetings, enroll Participants in Courses and upload Contact, Whiteboard/Plan and Multimedia files.

The screenshot shows the 'Supervisor Advanced Settings' dialog box for user 'SUPERVISOR-JIM'. The dialog has a title bar with 'Supervisor Advanced Settings' and three buttons: 'Cancel', 'Save', and 'Help'. The main area contains several sections of settings:

- Username:** SUPERVISOR-JIM
- May Modify:**
 - Username
 - Password
 - Display Name
 - Email Address
 - Profile
- Security:**
 - May Manage Participant Passwords
- May Manage:**
 - Participants
 - Meetings
- May Upload:**
 - Users
 - Contacts
 - Whiteboard/Plan Files
 - MultiMedia Files
- May Enroll:**
 - Participants in Courses



A special note on the chair privilege

The chair privilege gives users access to the full functionality of Elluminate *Live!*, beyond the functions available to non-chair attendees. Chairs can perform the following tasks in Elluminate *Live!* sessions³:

- Manage session attendees and interaction
- Share content
- Use all features including video, multimedia, application sharing
- Record sessions
- And much more...



Caution! Do not confuse the Moderator **user role** with the chair **privilege**.

The creator or owner of a session is automatically granted chair privileges for that session. However, sessions are often scheduled by users who will not be attending the sessions so chair privileges may be given to other users who **will** chair the sessions.



There is no requirement that a person with chair privileges be present in a Course, Drop-In or Meeting session. However, keep in mind that some Elluminate *Live!* features are not accessible to non-chair attendees.

More than one registered SAS user can be given chair privileges for a single session:

- **Courses:** Only Moderators, Supervisors and Administrators can be granted the chair privilege for Courses.⁴ Typically, you would assign a Moderator to this role.
- **Drop-Ins:** Only Moderators, Supervisors and Administrators can be granted the chair privilege for Drop-Ins.⁵
- **Meetings:** Any users (including SAS Participants and non-SAS guests) can be granted the chair privilege for Meetings. In fact, you have the option of making all Meeting users (whether registered SAS users or not) chairs in a Meeting.

³ The available tasks will vary depending on which edition of Elluminate *Live!* you are using.

⁴ There are two exceptions: Participants can be chairs of Courses and Drop-Ins if the “All Participants are Chair” flag is set for the sessions or if, within the session, an existing Moderator promotes a Participant to Moderator.

⁵ There are two exceptions: Participants can be chairs of Courses and Drop-Ins if the “All Participants are Chair” flag is set for the sessions or if, within the session, an existing Moderator promotes a Participant to Moderator.

Functions available to SAS user roles

The table below shows which default functions are available to the registered SAS user roles. The Manager or an Administrator may take away a user's privileges to perform some of these default functions.

Table 1: SAS Functions Available to User Roles

| | Mgr. | Admin. | Super. | Mod. | Part. |
|---|------|--------|--------|------|-------|
| Create and manage users | | | | | |
| Administrator | ✓ | | | | |
| Supervisor | ✓ | ✓ | | | |
| Moderators | ✓ | ✓ | | | |
| Participants | ✓ | ✓ | ✓ | | |
| Modify own profile | ✓ | ✓ | ✓ | ✓ | ✓ |
| Create and manage sessions | | | | | |
| Courses | ✓ | ✓ | | | |
| Drop-Ins | ✓ | ✓ | | | |
| Meetings | ✓ | ✓ | ✓ | | |
| Enroll participants in courses | ✓ | ✓ | ✓ | | |
| View reports | ✓ | ✓ | ✓ | ✓ | |
| Upload/Preload | | | | | |
| Courses | ✓ | ✓ | | | |
| Drop-Ins | ✓ | ✓ | | | |
| Users | ✓ | ✓ | ✓ | | |
| Contacts | ✓ | ✓ | ✓ | | |
| Whiteboard, session plan & multimedia files | ✓ | ✓ | ✓ | | |
| Customize SAS Environment | | | | | |
| Modify user and session defaults | ✓ | | | | |
| Create Drop-In password | ✓ | | | | |
| Create session types | ✓ | | | | |
| Create labels | ✓ | | | | |
| Create levels | ✓ | | | | |
| Create Cost Centers | ✓ | | | | |
| Manage file storage quota | ✓ | ✓ | ✓ | | |
| Customize emails | ✓ | ✓ | ✓ | | |
| Participate in sessions | | | | | |
| Join sessions | ✓ | ✓ | ✓ | ✓ | ✓ |
| Play recordings | ✓ | ✓ | ✓ | ✓ | ✓ |



Types of sessions

SAS enables you to create three different kinds of sessions: Meetings, Courses and Drop-Ins. The type of session you should create will depend on your specific needs.

Table 2: Need/Session Matrix

| Need | Type of Session |
|--|--------------------|
| To conduct a one-time business meeting or training session that will take place in a short timeframe. | Meeting |
| To provide a meeting place that is available to people 24/7 over a long period, such as for a discussion forum. | Meeting or Drop-In |
| To provide a resource room that is available to people over an extended period of time but during fixed hours only, such as a virtual office, technical support desk or tutorial room. | Drop-In |
| To create a series of sessions that share a common objective, such as weekly departmental meetings. | Drop-In |
| To deliver an academic course or corporate training program by way of a series of regularly scheduled sessions. | Course |

Meetings

Create Elluminate *Live!* Meetings to simulate regular face-to-face meetings or training sessions. Meetings are scheduled in advance, attendees are invited and usually someone is assigned to be in charge of the Meeting (a facilitator or teacher).



Schedule Meetings rather than Drop-Ins when you want to send specific people an email invitation to attend the session, including SAS registered users and non-SAS guests.

Meetings typically are scheduled for relatively short durations, but you can also create Meetings that are open for long durations (up to a year). These are suitable for providing 24/7 discussion forums and 24/7 technical support desks.

Courses

Create an Elluminate *Live!* Course to deliver your corporate training programs or academic courses. Using the SAS Course Utility, the Manager and Administrators schedule individual Elluminate *Live!* sessions using an academic model, where a Course is delivered as a series of individual classes scheduled over an extended period of time.

 Schedule Courses when you want attendance limited to enrolled SAS registered users only.

There are three components to Courses: templates, instances and sessions.

- **Course Template:** A Course template describes the course (e.g., Math 101 – This is an introductory course in algebra. It is the pre-requisite of Math 201.) The Course can be offered more than once and can be subdivided into several instances.
- **Course Instance:** A Course instance is a single offering of the course in which Participants are enrolled (e.g., Spring 2007, Prof. Black) and may be composed of one or more course sessions (lectures, tutorials, labs, etc.). If Participants are enrolled in a course instance, they are automatically enrolled in all sessions belonging to that instance.
- **Course Sessions:** Course sessions are the actual scheduled sessions (lectures, tutorials, labs, etc.) that the Participants attend (e.g., Lectures on Mondays, Wednesdays and Fridays from 9 to 10 a.m. and Labs on Tuesdays from 1:00 to 3:30 p.m.).

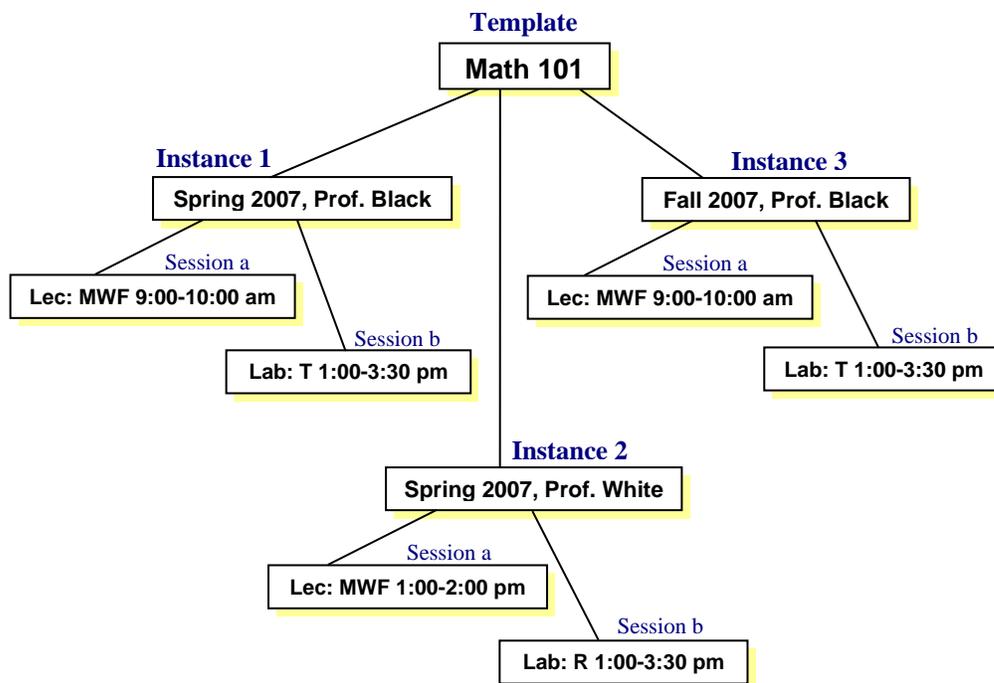


Figure 2: Course Schema



Drop-Ins

Create Drop-In sessions if you want to create virtual offices (such as a customer support desk open during office hours only) or a series of regularly scheduled meetings (such as weekly departmental meetings). Drop-Ins can be scheduled as recurring sessions, of fixed duration, over a period of time.

 Drop-Ins are open to both SAS registered users and non-SAS guests.

There are two components to Drop-Ins: templates and sessions.

- **Drop-In Template:** A Drop-In template describes the Drop-In (e.g., Zemina's Virtual Office open to clients for online consulting).
- **Drop-In Sessions:** Drop-In sessions are the scheduled times that users can attend the Drop-In (e.g., Monday to Friday, 9:00 a.m. to 4:30 p.m. MST).

Announcing sessions to users

Before you create a new session, you need to decide how you want attendees to access your session. There are three attendance models:

- **SAS Email Invitation/Notification:** You can have session attendees access a session via a link in an email invitation/notification sent directly by the SAS to the attendee. Invitees/enrollees must be registered SAS users or SAS contacts.
- **SAS Schedule:** You can have session attendees access a session via a link in their SAS schedule. Attendees must be registered SAS users.
- **Guest Link:** You can have session attendees access a session via a guest link. You can publish this link any way you want: include it in email (composed by you, not the SAS), publish it on a website or post it in your online course. Attendees can be anyone – SAS registered users, SAS Contacts or anyone outside of the SAS.

 Moderators also can invite additional participants from within a live session by sending them In-Session Invitations. These invitations are sent via your default email application. In-Session Invitations are available in Meetings and Drop-Ins only – not in Courses. (See the Moderator's Guide for details.)

The way users join sessions is closely tied to the way the session has been announced. The following table describes the options you have for announcing Meetings, Drop-Ins and Courses to various types of users. The sections following the table provide descriptions of these options.

Table 3: Announcing Sessions

| Session | User | How to announce to user |
|---------|--|---|
| Meeting | Registered SAS Users ⁶ (chair and non-chair) | Send Email Invitation : specify user as an Invitee (chair or non-chair) in the SAS and have the SAS generate an email invitation containing a link to automatically launch the session. |
| | | Make Session Public : allow registered SAS users to join the session from their session schedule . |
| Meeting | SAS Contacts (chair and non-chair) | Send Email Invitation : specify Contact as an Invitee in the SAS and have the SAS generate an email invitation containing a link to automatically launch the session. |
| Meeting | All Users (non-chair) | Publish Guest Link : publish a guest link that anyone can use to automatically launch a session. |
| Drop-In | Registered SAS Users ⁷ (chair) | Send Email Notification : specify user as a chair in the SAS and have the SAS generate an email notification. |
| | | Make Session Public : allow registered SAS users to join individual sessions from their session schedule . |
| Drop-In | All Users (non-chair) | Publish Guest Link : publish a guest link that anyone can use to automatically launch a session. |
| Course | Registered SAS Users ⁸ (chair) | Send Email Notification : specify user as a chair in the SAS and have the SAS generate email notification. |
| | | Make Session Public : allow registered SAS users to join individual sessions from their session schedule . |
| Course | Registered SAS Participants (non-chair) | Send Email Notification : enroll SAS Participants in Courses and have the SAS generate email enrollment notifications. |
| | | Make Session Public : allow registered SAS users to join individual sessions from their session schedule . |
| | | Enable Self-Enrollment : make session public and grant Participants the privilege to enroll in the entire Course instance – not just individual sessions. |

⁶ Administrator, Supervisor, Moderator or Participant.

⁷ Administrator, Supervisor or Moderator – not Participants.

⁸ Administrators, Supervisors or Moderators – not Participants.



Send email invitation (Meetings)

If you want certain registered SAS users and/or SAS Contacts to attend a Meeting, you can invite them through the SAS (either as chairs or non-chairs). Once you have identified them as Invitees, you can have the SAS automatically send them an email invitation (using either the standard email template or your own customized version of the template).

The email provides information about the Meeting, contains a link that attendees click on to join the meeting and includes a link for adding the meeting to their calendars.⁹ (Due to the different nature of their roles in a Meeting, chairs and non-chairs receive unique emails containing unique links.)

To join the session, Invitees simply click on the link in the email within the scheduled time period for the Meeting.

Send email notification (Courses and Drop-Ins)

To have registered SAS users attend a Course, you must enroll them through the SAS (either as chairs or non-chairs). Once you have identified them as Enrollees, you can have the SAS automatically send them an email notification (using either the standard email template or your own customized version of the template).

The email provides information about the Course and contains a link to the login page on the Elluminate website: www.illuminate.com/member.jsp.

To join a Course session, users log in to the SAS within the scheduled time period for the session and launch the session from a link in the list of available sessions.

You also may send an email notification to a SAS user who you have identified as the chair of a Drop-In.

Publish guest link

If you want your Drop-In or Meeting to be open to anyone (whether registered or listed in the SAS or not), use the guest link created for you by the SAS. You can make the link available to the public by posting it on a website, publishing it in a newsletter, having invited SAS attendees invite others via email or by word of mouth, or by whatever means you wish.

To join the session, guests click on the guest link within the scheduled time period for the Drop-In or Meeting. They will be prompted for the name by which they want to be identified in the Elluminate *Live!* Meeting or Drop-In and are then launched into the session.

⁹ This is for any calendar that recognizes .vcf files, such as MS Outlook.

Make session public

You can make Meeting, Drop-In and Course sessions available to all registered SAS users by setting the access flag of individual sessions to Public. Public sessions will appear in the registered SAS users' [session schedule](#).

To join a session, users log in to the SAS within the scheduled time period for the session and launch the session from a link in the list of available sessions.

Enable self-enrollment

If you want your Registered Participants (non-chair) to decide for themselves which Courses to attend, you can give them the option of enrolling themselves.¹⁰

When Participants log in to the SAS, they can go to the Enroll Utility, view a list of available Courses, view Course details and schedule, and enroll in Courses with a single click. To withdraw from a Course, Participants use the Withdraw Utility. (Withdrawn Courses are available for enrollment again.)

To attend a Course session, Participants log in to the SAS during the scheduled time period for the session and launch the session from a link in the list of available sessions.



Self Enrollment is not an option for chair Participants – they must be explicitly assigned to a Course instance by the Administrator.

¹⁰ To do so, you set a [Level Range](#) for the Course, give the equivalent level to SAS Participants and then grant Participants self-enrollment privileges.



Chapter 3 The SAS Interface

 To log in to the SAS, click on the **My Elluminate** icon at the top of <http://www.elluminate.com/>.

At the highest level, the SAS interface is divided into five main functional areas or *pages*, accessible by clicking on tabs: My Elluminate, Profile, Utilities, Reports and Software.

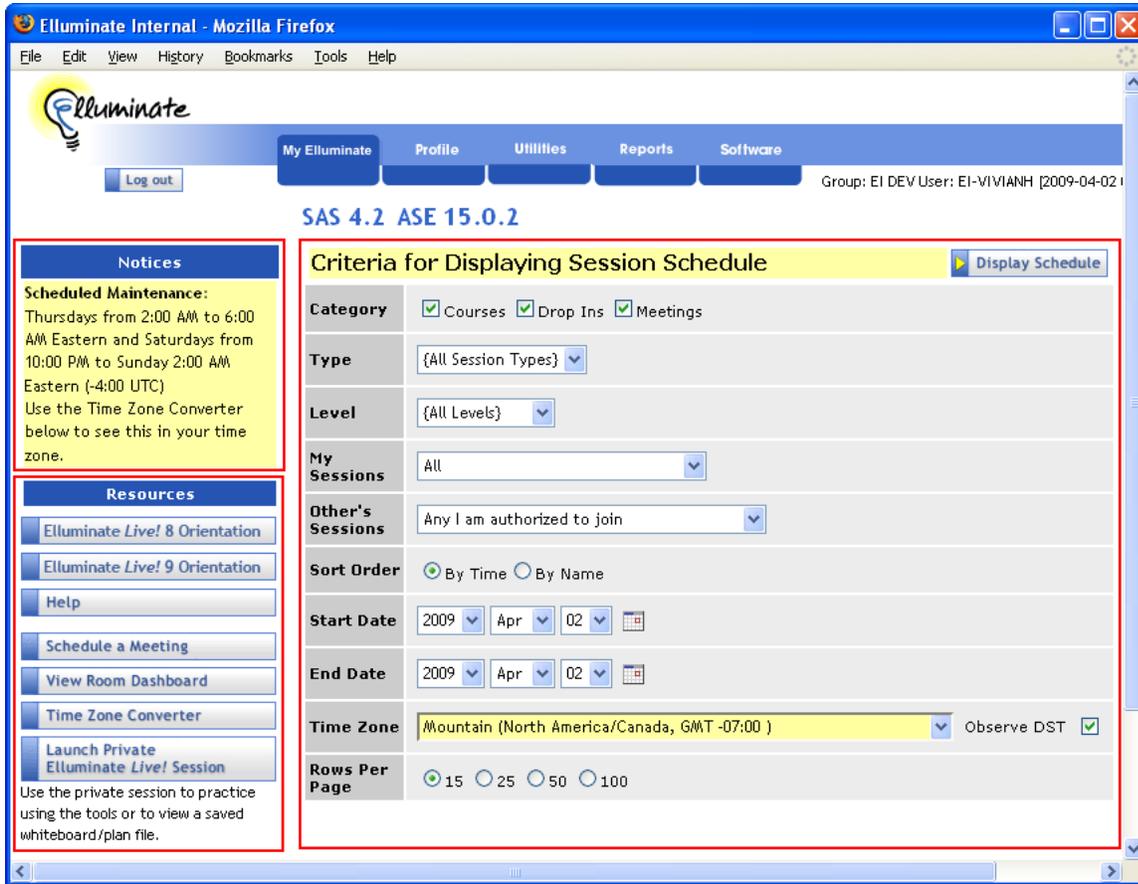


Contained within the pages are *utilities*, grouped according to function. Individual windows within each utility are called *panels*.

 The content of each functional page varies with a user's role. For example, SAS Managers will have a full set of SAS utilities available to them under the Utilities Tab, whereas SAS Supervisors can access only a subset of those utilities.

My Elluminate page ¶ M A S

The My Elluminate page is the first page you see when you log in to the SAS. It is divided into three main sections: Session Schedule Selection Criteria, Notices and Resources.



 Moderators and Participants will see a fourth section (below Session Schedule Selection Criteria) containing either today's schedule or the schedule generated when they select criteria and click on the **Display Schedule** button. It has the same content as your [Session Schedule](#).

The tasks you can perform and the resources you can access from the My Elluminate page depend on your user role. Those tasks include the following:

- Set criteria for which sessions you want to view in your schedule
- Launch a private session
- Schedule a new session
- Convert time zones
- Take an online orientation of Elluminate *Live!*
- Access help web page
- View a list of currently running sessions



Session Schedule Selection Criteria

This section is used to specify a number of criteria for displaying a list of sessions to which you have access. When you have selected your criteria and click on the **Display Schedule** button, a list of sessions (based on your criteria) is displayed in a new page (see [Session Schedule](#)).

-
-  The specific criteria available to users are dependent on the users' roles.
 -  The time period for which you can display sessions is restricted to a one month period.
-

Notices

This section is used by Elluminate staff to notify users of issues and events that may affect their use of the system. For example, scheduled system maintenance is announced through this mechanism. Only Elluminate staff can add and edit notices.

What is displayed here can vary, depending on your user role.

Resources

This section gives you access to various tools and resources to help you use the SAS. These include Elluminate *Live!* orientations, online help, the room dashboard (to view currently running sessions), a time zone converter, a quick meeting scheduler and a link to launch a private virtual Elluminate *Live!* session.

-
-  A private session is a virtual session not connected to a session scheduled in the SAS. You are the only one in the session. Use a private virtual session when you want to practice using the whiteboard tools, create a whiteboard file or review a saved whiteboard file.
 -  The Participants, Chat, Audio and Application Sharing windows do not function in a private virtual session.
-

Session schedule ¶ M A S

This secondary My Elluminate page is generated when you click on the **Display Schedule** button from the main My Elluminate page. On this page you can

- view your schedule of available sessions,
- view information about scheduled sessions,
- if you are a Supervisor or Administrator, edit or delete a Meeting; and
- join scheduled sessions.

There are 2 pages of results.

| | | 1 | | | 2 | | | | | | |
|-----------------|----------|----------|--|------|-----------|-----------|---------------|----------------------|------|--------|------|
| Date | Starts | Ends | Name | Type | Min Level | Max Level | Hosted By | Details | Edit | Delete | Join |
| Tue Sep 08 2009 | 01:00 PM | 03:00 PM | BIOLOGY 200 - FALL 2009 -- PROF. BLACK | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| Wed Sep 09 2009 | 01:00 PM | 03:00 PM | BIOLOGY 200 - FALL 2009 -- PROF. WHITE | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| Thu Sep 10 2009 | 01:00 PM | 03:00 PM | BIOLOGY 200 - FALL 2009 -- PROF. BLACK | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| Fri Sep 11 2009 | 01:00 PM | 03:00 PM | BIOLOGY 200 - FALL 2009 -- PROF. WHITE | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| Sat Sep 12 2009 | 09:30 AM | 12:30 PM | MATH 101 - FALL 2009 -- PROF. GRAY | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| Tue Sep 15 2009 | 01:00 PM | 03:00 PM | BIOLOGY 200 - FALL 2009 -- PROF. BLACK | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| Wed Sep 16 2009 | 01:00 PM | 03:00 PM | BIOLOGY 200 - FALL 2009 -- PROF. WHITE | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| Thu Sep 17 2009 | 01:00 PM | 03:00 PM | BIOLOGY 200 - FALL 2009 -- PROF. BLACK | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| Fri Sep 18 2009 | 01:00 PM | 03:00 PM | BIOLOGY 200 - FALL 2009 -- PROF. WHITE | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| Sat Sep 19 2009 | 09:30 AM | 12:30 PM | MATH 101 - FALL 2009 -- PROF. GRAY | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| Tue Sep 22 2009 | 01:00 PM | 03:00 PM | BIOLOGY 200 - FALL 2009 -- PROF. BLACK | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| Wed Sep 23 2009 | 01:00 PM | 03:00 PM | BIOLOGY 200 - FALL 2009 -- PROF. WHITE | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| Thu Sep 24 2009 | 01:00 PM | 03:00 PM | BIOLOGY 200 - FALL 2009 -- PROF. BLACK | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| Fri Sep 25 2009 | 01:00 PM | 03:00 PM | BIOLOGY 200 - FALL 2009 -- PROF. WHITE | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| Sat Sep 26 2009 | 09:30 AM | 12:30 PM | MATH 101 - FALL 2009 -- PROF. GRAY | NONE | NONE | NONE | Vivian Hindbo | View | | | |
| | | 1 | | | 2 | | | | | | |

This is the list of sessions to which you have access, both those to which you have been specifically enrolled or invited and public sessions open to all registered SAS users (provided they have the [required level](#)). If you do not specify any selection criteria and simply click on the **Display Schedule** button, the default list shows all sessions you can attend in the next week. You can change which sessions are listed by specifying selection criteria, as described above.

To view details about the session or join a session in progress, you simply click on the appropriate link in the schedule.



Profile utility † M A S

When you click on the Profile tab, the Profile Utility is launched. This utility allows you to change your user profile information (user name, password, display name, contact information, etc.).

By changing your user privileges, your Manager or Administrator may restrict you from updating certain elements of your profile (or even completely block your access to this utility).

You can perform the following tasks in the Profile Utility:

- Change your user name and password
- Change your display name
- Change your email address
- Change your time zone
- Change your contact information



Users cannot change the “Level” and “Registered” fields in their profiles.

Utilities page

This page is the cornerstone of the SAS. It gives you access to the primary utilities where you will be doing most of your work in the SAS. On this page, the utilities are organized into functional groups. Each utility is comprised of a series of windows that enable you to accomplish specific tasks within the utility – these windows are called panels.

The screenshot shows the SAS Utilities page. At the top left is the 'Elluminate' logo. A navigation bar contains tabs for 'My Elluminate', 'Profile', 'Utilities', 'Reports', and 'Software'. The 'Utilities' tab is selected. To the right of the navigation bar, it says 'Log out' and 'Group: EI DEV User: EI-VIVIANH [2008-07-11 02:27]'. Below the navigation bar are five utility panels:

- User Management** (What is This?):
 - Users: Manage and Upload Users.
- Contact Management** (What is This?):
 - Contacts: Manage and Upload Contacts.
- Session Management** (What is This?):
 - Courses: Manage Course Templates, Instances, Sessions.
 - Course Enrollment: Enroll/Withdraw Participants to/from Courses.
 - Drop Ins: Manage Drop In Templates and Sessions.
 - Meetings: Manage Meeting Sessions, Defaults, and Email Invitations.
- Advanced Settings Management** (What is This?):
 - Session Types: Manage Elluminate Live! Session Types.
 - Labels: Manage Elluminate Live! Labels.
 - Levels: Manage Course, Drop In, Meeting and User Levels.
 - Cost Center: Manage Cost Centers.
- File Management** (What is This?):
 - Files: Manage Recording, MultiMedia, and Whiteboard/Plan Files.

The utilities to which you have access (and how they are grouped on this page) will depend on your user role. Your user role also determines which default functions you are able to perform within utilities.

 Within each utility is a set of default functions each user role can perform. A Manager or Administrator can override the defaults and change a user's access to functions.



User Management utility † M A S

Anyone who wants to use the SAS requires a user account. Elluminate Inc. creates the first user account for you – the Manager account. Using the User Management Utility, the Manager must create at least one Administrator account for your organization. Administrators can create all further accounts (Supervisors, Moderators and Participants).

Table 4: User Management Functions Available to User Roles

| Task | Manager | Administrator | Supervisor |
|--|---------|---------------|------------|
| Create and manage Administrator accounts | ✓ | | |
| Create and manage Supervisor accounts | ✓ | ✓ | |
| Create and manage Moderator accounts | ✓ | ✓ | |
| Create and manage Participant accounts | ✓ | ✓ | ✓ |

You can perform the following tasks in the User Management Utility:

- Sort/filter list of existing users
- Add new users (one at a time or by uploading several at a time from a file)
- Edit user profile information
- Grant or restrict user privileges
- Delete users

Course Management utility † M A

The Course Management Utility enables the Manager and Administrators to create and manage Courses, enroll Participants in Courses and assign Course chairs.

You can perform the following tasks in the Course Management Utility:

- Sort/filter list of Course Administrators († M only)
- View list of all Courses (templates) associated with a particular Administrator
- Set default options for all Courses associated with an Administrator
- Create, manage and delete Courses (templates, instances and sessions)
- Upload data from files to create Courses (templates, instances and sessions)
- Customize notification email templates
- Set Course instance options
- Enroll registered Participants in Course instances and notify them by email

- Assign chair(s) (e.g., instructor) to Course instances
- Set Course session options, including options for recording Course sessions
- Preload multimedia, session plan or whiteboard files into Course sessions
- Review details about past Course sessions
- Join a Course session in progress

Course Enrollment utility † A S

The Course Enrollment Utility enables Administrators and Supervisors to enroll Participants in Courses and withdraw them from Courses.



To perform user enrollment functions, the Manager must use the Course Management Utility.

You can perform the following tasks in the Course Enrollment Utility:

- Sort/filter list of Courses
- Enroll registered Participants in Courses instances and notify them by email
- Withdraw registered Participants from Courses instances and notify them by email
- See a log of notification emails that have been sent to a Course Participant



To assign chairs to Courses, Administrators must use the Course Management Utility.

Drop-In Management utility † M A

The Drop-In Management Utility enables the Manager and Administrators to create and manage Drop-Ins and assign Drop-In chairs.

You can perform the following tasks in the Drop-In Management Utility:

- Sort/filter list of Drop-In Administrators († M only)
- Create list of passwords available for Drop-Ins († M only)
- View list of all Drop-Ins (templates) associated with a particular Administrator
- Set default options for all Drop-Ins associated with an Administrator
- Create, manage and delete Drop-Ins (templates and sessions)
- Upload data from files to create Drop-Ins (templates and sessions)
- Customize notification email templates
- Add or remove Drop-In passwords
- Assign chair(s) to Drop-In instances and notify them by email



- Set Drop-In session options, including options for recording Drop-In sessions
- Specify multimedia, session plan or whiteboard preloads for Drop-In sessions
- Review details about past Drop-Ins
- Join a Drop-In in progress

Meeting Management utility † M A S

The Meeting Management Utility enables the Manager, Administrators and Supervisors to create and manage Meetings and invite users as chairs or non-chairs.

You can perform the following tasks in the Meeting Management Utility:

- Sort/filter list of Meeting Administrators or Supervisors († M only)
- View list of all Meetings associated with a particular Administrator or Supervisors
- Set default options for all Meetings associated with an Administrator or Supervisor
- Create, manage and delete Meetings
- Customize invitation email templates
- Invite registered Participants to Meeting (as either Attendee or chair) via email invitation
- Invite Contacts to Meeting via email invitation
- Set Meeting session options, including options for recording Meeting sessions
- Preload multimedia, session plan or whiteboard files into Meeting sessions
- Review details about past Meetings
- Join a Meeting in progress

File Management utility † M A S

The File Management Utility enables Manager, Administrators and Supervisors to manage the storage of recording, multimedia, session plan and whiteboard files.

On a large system like the SAS, where the number of active users is substantial, disk space must be managed carefully to ensure that all users have equal access to disk storage. This is done by assigning a disk quota to each customer. The File Management Utility helps you manage your disk usage and remain within your assigned disk quota. Whiteboard, session plan, multimedia and recording files that are stored in the SAS probably take up most of your used disk quota. You may want to periodically delete some of these files to manage your disk quota.

You can perform the following tasks in the File Management Utility:

- View disk usage information (quotas and actual usage) for entire organization or by Administrator († M only) and Supervisor († M A only)
- Upload whiteboard, session plan and multimedia files
- Add whiteboard, session plan and multimedia files to sessions
- Remove whiteboard, session plan and multimedia preloads from sessions
- See how many times a recording, whiteboard file, session plan or multimedia file has been accessed by users
- Delete recording, whiteboard, session plan and multimedia files to free up disk space

Contact Management utility † M A S

The Contact Management Utility allows the Manager, Administrators and Supervisors to manage Contact Lists. Contact Lists are used to send email invitations to users, informing them of new sessions.

You can perform the following tasks in the Contact Management Utility:

- Sort/filter list of Administrators and Supervisors who “own” contacts († M only)
- Sort/filter list of contacts
- Create new and edit exiting contacts
- Upload external contact lists
- Delete contacts

Session Types utility † M A S

The Session Types Utility allows the Manager to create Session Types and Administrators and Supervisors to assign them to sessions.

Beyond Courses, Meetings and Drop-Ins, the SAS does not distinguish between types of sessions. (The default Session Type in the SAS is “None”.) If you would like to make further distinctions between your sessions, you can create Session Types. For instance, for Courses you might want to distinguish between lectures, labs and tutorials. You can create these customized types using the Session Types utility. Then, when you create a new Course, Drop-In or Meeting, you can select one of your customized Session Types from a drop-down list.



Session Types can be assigned to Course instances, Drop-In templates and Meeting sessions.



The Session Type field appears in the schedule as well as in the invitation and notification emails sent to those you have invited to or enrolled in your session.

You can perform the following tasks in the Session Types Utility:

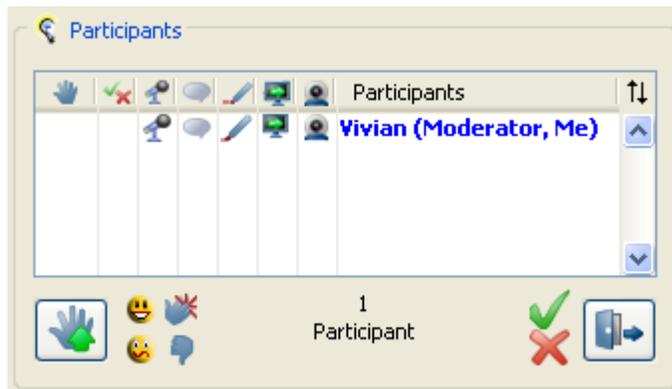
- Sort/filter list of Session Types
- Assign Session Types to Courses, Drop-Ins, Meetings and session Rooms¹¹
- Create new and edit exiting new Session Types († M only)
- Delete Session Types († M only)

Labels utility † M A S

The Labels Utility allows the Manager to create Labels, and Administrators and Supervisors to assign them to sessions. (Use of Labels is optional.)

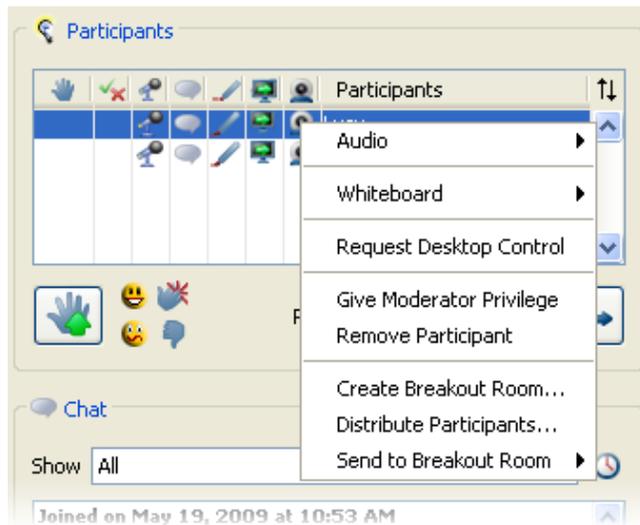
Labels are the names used for certain elements within the Elluminate *Live!* client interface. The default set of Labels uses the terms Session, Moderator, Participant and Breakout Room.

In the example below, note the word “Moderator” after Vivian’s name.



¹¹ A Room is an instantiation of a session. It is created as soon as the session is launched. For example, if someone enters your virtual office and leaves, and then another person enters and leaves, there will be two Rooms associated with your virtual office session.

In the example below, note the words “Moderator”, “Participant” and “Breakout Room” in the drop-down menu.



Caution! The term “Moderator” is used differently in Elluminate *Live!* sessions than it is in the SAS. In an Elluminate *Live!* session, a Moderator is someone with chair privileges. In the SAS, the Moderator is a distinct user role with certain inherent privileges, which may or may not include the chair privilege.

Your Manager may customize the Elluminate *Live!* Labels in the SAS – either by making changes to the default set of Labels or by creating new Label sets. Then, when you create a new Course, Drop-In or Meeting, you can select the customized Label set from a drop-down list. The customized Labels will appear in various menus and dialog boxes of the Elluminate *Live!* interface when a session is launched.

For example, you may want to create a customized set of Labels specifically for a college or university Course:

- instead of “Moderator” use the term “Professor”;
- instead of “Participant” use the term “Student”;
- instead of “Session” use the term “Lecture”; and
- instead of “Breakout Room” use the term “Tutorial Room”.

You can perform the following tasks in the Labels Utility:

- Sort/filter list of Label sets
- Assign Label sets to Courses, Drop-Ins, Meetings and session Rooms
- Create new and edit existing Label sets (M only)
- Delete Label sets (M only)



Levels utility ¶ M A S

The Levels Utility allows the Manager to create user Levels, and Administrators and Supervisors to assign them to sessions. (Use of Levels is optional.)

You can limit access to a Course, Drop-In or Meeting by creating user Levels in the SAS (e.g., Staff, Management and Senior Executive; Junior, Sophomore and Senior; etc.). You then assign Levels to your users and, when creating the session(s), specify what *range* of user Levels is eligible to attend.

A Level consists of a

- **Level Type**, which is a textual representation (name) of the Level; and a
- **Level Weight**, which is a numeric representation of the Level.

Level Weights must be whole numbers between 1¹² and 1000, where the highest number corresponds to the highest level, such as in the following example:

| <u>Level Type</u> | <u>Level Weight</u> |
|-------------------|---------------------|
| Beginner | 1 |
| Intermediate | 2 |
| Advanced | 3 |

For a Course, Drop-In or Meeting, the **Level Range** consists of a minimum level and a maximum level. Keeping with the example above, you may decide that only Intermediate or Advanced users can attend your training Course. Therefore, when creating the Course, you must select a minimum level of Intermediate and a maximum level of Advanced. Or, if you want only Intermediate users to attend, you would set both the minimum level and maximum level to Intermediate. When you proceed to enroll or invite users to your new Course, Drop-In or Meeting, only those users who fall within the specified Level Range will appear in the list of eligible users.

You can perform the following tasks in the Level Utility:

- Sort/filter list of Levels Types
- Assign Levels Types to users
- Set a range of Level Types (minimum and maximum) for Courses, Drop-Ins, Meetings and session Rooms
- Create new Level Types (¶ M only)
- Delete Level Types (¶ M only)

¹² Zero (0) is reserved for the Default Level.

The default level

A Default Level in the SAS is “None” with a Level Weight of 0. If the default is specified for a session (minimum Level 0 and maximum Level 0), access is granted to all users, regardless of their assigned Levels.

The Default Level Weight cannot be deleted, nor can you change its Level Weight. You can, however, change the Level Type (name) from “None” to something appropriate to your institutions' needs.

Cost Center utility † M A S

The Cost Center Utility allows the Manager to create and manage Cost Centers, and Administrators and Supervisors to assign them to sessions. (Use of Cost Centers is optional.)

Cost Centers are like accounts against which you can track attendance at Elluminate *Live!* sessions in your organization. For example, if you want to track Elluminate *Live!* usage by department or faculty, you should set up a Cost Center for each department or faculty. Similarly, if you want to track the use of Elluminate *Live!* associated with a particular client project, you should set up a Cost Center for that client. When scheduling your new sessions, you simply select the appropriate Cost Center from a drop-down list.

Cost Center information is displayed in various reports. You can track the number of sessions, attendees and minutes associated with each Cost Center.

The default Cost Center in the SAS is called “None”.

You can perform the following tasks in the Cost Center Utility:

- Sort/filter list of Cost Centers
- Create new Cost Center († M only)
- Assign Cost Center to Courses, Drop-Ins, Meetings and session Rooms
- Delete Cost Center († M only)

Recordings utility † Mod. & P

The Recordings Utility is used by Moderators and Participants to list and play recordings of past sessions. They can list and play only those recordings to which they have access.

From the list of recorded sessions, they can click on a link to view details about the recording or click on a link to play a recording.



Moderators and Participants can perform the following tasks in the Recordings Utility:

- Set criteria for which recordings they want to view
- View their list of available recordings
- Play recorded sessions

Reports page ¶ M A S

The Reports Page gives you access to a number of reporting utilities that are grouped under two main areas: Summary Reports and Comprehensive Reports. Which reports you can use depends on your user role, as listed in Table 5 below:

Table 5: Reports Available to User Roles

| | Mgr. | Admin. | Super. | Mod. | Part. |
|------------------------------|------|--------|--------|------|-------|
| Summary Reports | | | | | |
| User Summary | ✓ | ✓ | ✓ | | |
| Administrator Summary | ✓ | | | | |
| Supervisor Summary | ✓ | ✓ | | | |
| Session Summary | ✓ | ✓ | | | |
| Participant Summary | | | ✓ | | |
| Comprehensive Reports | | | | | |
| Running Session | ✓ | ✓ | | | |
| Session Attendance | ✓ | ✓ | ✓ | | |
| Meeting Information | ✓ | ✓ | ✓ | | |
| Course Registration | ✓ | ✓ | | ✓ | |
| Participant Attendance | ✓ | ✓ | ✓ | | |
| Metric | ✓ | | | | |

Reports can be generated for a specified time period (no longer than 31 days) and in either HTML format or as a TSV file (Tab Separated Value file) that can be opened with MS Excel.

Summary reports

You can generate the following reports from the Summary Reports area:

- User Summary Report: summary information about the registered users you (or your Administrators or Supervisors) own, including login history and user quota information
- Administrator Summary Report: summary information about the registered Administrators you own
- Supervisor Summary Report: summary information about the registered Supervisors you or your Administrators own
- Participant Summary Report: summary information about the registered Participants you own
- Session Summary Report: summary information about the Elluminate *Live!* sessions you own

Comprehensive reports

You can generate the following reports from the Comprehensive Reports area:

- Running Session Report: summary information about the currently running Elluminate *Live!* sessions for your login group
- Session Attendance Report: session and attendee information for all sessions that occurred in the defined time period
- Meeting Information Report: detailed breakdown of the Meetings scheduled to run during the defined period of time
- Course Registration Report: list of enrollees for a particular Course
- Participant Attendance Report: list of Participants who have attended sessions during the defined period of time
- Metric Report: metrics on rooms, attendees and recordings for all sessions for your login group.



Software page † M A S

To run Elluminate *Live!* sessions, Sun Microsystems' Java Web Start or an open-source alternative (such as Open-JNLP) must be installed and configured on your computer. This page instructs you how to download and install Java Web Start and provides instructions for pre-configuring your computer.

If you do not have the required software installed, you will automatically be taken to this page each time you log in to the SAS, or prior to joining your first Elluminate *Live!* session.



Install the required software prior to your first Elluminate *Live!* session – then you will have to do it once only.
