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Breeze Manager is a web application that acts as an access and control point for all Macromedia Breeze applications. Breeze Manager allows you to set up and manage meetings, seminars, and training courses and curriculums, as well as manage content that can be shared through meetings, presentations, training courses, and events.

In addition, the user management component of Breeze Manager enables you to set access permissions for both the users of this content and the content itself.

**Note:** Not everyone can use all the Breeze Manager features. The features you can access depend on your Breeze configuration and your permissions.

**Breeze Manager users**

You use different features of Breeze Manager depending on your user needs. Breeze users are divided into the following groups:

- “Meeting Hosts” on page 7
- “Authors” on page 8
- “Training Managers” on page 8
- “Seminar Hosts” on page 8
- “Event Managers” on page 8
- “Administrators” on page 8

**Meeting Hosts**

This group includes administrative assistants, managers, and everyone in an organization who can create Breeze Meetings. You do not need Breeze Manager to attend such a meeting; all you need is the meeting URL. However, in many cases, you can enter a Breeze Meeting from Breeze Manager as well. For background information about meetings, see Chapter 8, “About Meetings,” on page 119. For instructions on joining, creating, or modifying meetings, see Chapter 9, “Working with Meetings,” on page 127.
Authors

An author is anyone who uploads content to the Breeze server. Content can include files created in Breeze Presenter, Macromedia Captivate, or any other content uploaded to the Breeze Content library. For information on the types of files you can upload to Breeze, see “Types of files in the Content library” on page 29.

For information on working with Macromedia Breeze Presenter, see Breeze Presenter User Guide. Once the file conversion is complete, see Chapter 3, “Working with Content,” on page 35. This chapter explains how to work with content files. In addition, the chapter includes instructions for viewing presentations, since a completed presentation can be viewed from the Content library—not only at the meeting, but any time thereafter—by those who have the proper permissions.

Training Managers

Breeze refers to trainers as “training managers.” This group includes anyone developing courses and curriculums. If you are a trainer or course manager, see, Chapter 5, “Working with Courses,” on page 63, Chapter 6, “Working with Training Curriculums,” on page 81, and Chapter 7, “Managing the Training Library,” on page 109.

Seminar Hosts

This group includes individuals who present seminars. A seminar is a special kind of meeting with its own attributes and licensing structure. For information on seminars, see Chapter 11, “About Seminars,” on page 159. For instructions on creating and changing seminars, see Chapter 12, “Working with Seminars,” on page 165; for information on managing seminar files, see Chapter 13, “Managing the Seminar Library,” on page 181.

Event Managers

This group includes anyone who organizes events. An event can be any meeting, presentation, course, curriculum, or seminar that requires registration and generates reports with participant tracking information. For a description of events, see Chapter 14, “About Events,” on page 195. For procedures on creating and managing events, see Chapter 15, “Working with Events,” on page 201 and Chapter 16, “Managing the Event Library,” on page 221. If your event also includes a presentation, see Chapter 3, “Working with Content,” on page 35.

Administrators

This group consists of the users who manage the Breeze application for the entire organization. As such, administrators are responsible for customizing Breeze's appearance for their organization and managing all aspects of Breeze accounts. This includes performing any task that account and user management entails, such as creating custom user groups and assigning users to these, as well as to the Breeze built-in groups. If you are an administrator, see Chapter 17, “About Administration,” on page 235, Chapter 18, “Managing the Breeze Account,” on page 237, and Chapter 19, “Working with Users and Groups,” on page 255.
Integration with learning management systems

Enterprises can integrate Breeze content with their learning management systems (LMSs). Breeze supports the two standard LMS communication protocols:

- Aviation Industry CBT Committee (AICC) with HTTP AICC Communication Protocol (HACP), versions 2.0 through 3.5
- Sharable Content Object Reference Model (SCORM), version 1.2

You can select the appropriate LMS communication protocol when you publish content in Breeze Presenter. For more details, see *Breeze Presenter User Guide*.

System requirements

To use Breeze Manager you need the following:

- An Internet connection
- One of the supported operating systems listed at [www.macromedia.com/go/breeze_sysreqs](http://www.macromedia.com/go/breeze_sysreqs)
- One of the supported browsers listed at [www.macromedia.com/go/breeze_sysreqs](http://www.macromedia.com/go/breeze_sysreqs)
- Macromedia Flash Player 6 (6.0.65) or later as a browser plug-in

*Note:* Macromedia Flash Player is standard in most browsers. You can find out what version of Flash Player you have at the Test Macromedia Web Players page at [www.macromedia.com/software/flash/about/](http://www.macromedia.com/software/flash/about/).

- A sound card and speakers for listening to audio accompanying presentations or broadcasts by other meeting participants
- (Optional) A microphone to broadcast audio to other meeting participants or record narration for Breeze Presentations
- (Optional) A web camera to broadcast video to other meeting participants

For complete Breeze system requirements and recommendations, see [www.macromedia.com/go/breeze_sysreqs](http://www.macromedia.com/go/breeze_sysreqs).

What’s new in Breeze Manager

Breeze Manager 5.0 not only provides new and improved functionality for all the current users; it also has new features and new functionality for new kinds of users. For information on these, see the following:

- “New Breeze Manager tabs” on page 10
- “General application additions and enhancements” on page 10
- “New features for Breeze administrators” on page 11
- “New features for Breeze authors” on page 11
- “New features for Breeze trainers” on page 12
**New Breeze Manager tabs**

There are four new tabs, each representing a new functionality, that have been added to the Breeze Manager interface:

- **Training tab.** This tab replaces and incorporates all the features from the previous Courses tab, but also adds the ability to create and manage curriculums as well. See Chapter 6, “Working with Training Curriculums,” on page 81.

- **Seminar Rooms tab.** A seminar room is a type of meeting room that is used to hold large live events. See Chapter 11, “About Seminars,” on page 159, Chapter 12, “Working with Seminars,” on page 165, and Chapter 13, “Managing the Seminar Library,” on page 181.

- **Event Management tab.** An event can be any meeting, training, seminar, or presentation that requires registration and special reporting data. Since it is normally used to manage a large number of users at a time, the events functionality enables you to do bulk imports of large user lists via CSV (comma separated values) files. In addition, event reports include special features for participant data. See Chapter 14, “About Events,” on page 195, Chapter 15, “Working with Events,” on page 201, and Chapter 16, “Managing the Event Library,” on page 221.

- **Administration tab.** This tab combines the account administrator, reporting, and user management (the former Accounts, Reports, and Users tabs) functions used by Breeze administrators, with several new features and enhancements added. See “New features for Breeze administrators” on page 11, as well as Chapter 17, “About Administration,” on page 235, Chapter 18, “Managing the Breeze Account,” on page 237, and Chapter 19, “Working with Users and Groups,” on page 255.

In addition, the Reports tab has been removed because the reporting functionality has been moved into the individual tabs. Report functionality has been considerably enhanced; see “Reporting features” on page 10.

**General application additions and enhancements**

Breeze 5.0 has a new user interface, which makes Breeze Manager easier to use, and includes some additional features. For information about this, see Chapter 1, “Understanding the Workspace,” on page 15.

**Reporting features**

All the Breeze Manager functionalities have increased reporting capabilities, including the ability to set report filters and download or print reports.

A completely new reporting feature is the Dashboard. This feature provides a dashboard for each tab, with a graphical representation of statistical information relevant to the tab's function. Each Dashboard allows you to drill down to view more information on a specific item.

**List navigation**

Any list of user and group names that you use now has a Search button that enables you to locate a name in the list. You can also expand a group in a list to see the members, as well as select multiple names.
**Custom URLs**

You can now create a custom URL for your meetings, training, events, presentations, or seminars that is easy to remember. This name is appended to the domain name of your server, and is created when you set up the meeting, training, event, or seminar, as explained in the relevant chapters of this guide. For information on custom URLs, see “Custom URLs” on page 24.

**Custom branding**

The branding functionality for Breeze has been enhanced so you can incorporate your organization's identity throughout Breeze. You can apply color schemes and logos to your pages, including login pages and Breeze Manager, Breeze Presentations, and Breeze Meeting pages.

**New features for Breeze administrators**

In addition to the features mentioned earlier, Breeze 5.0 now has enhanced and expanded both the user management and account management aspects of account administration.

**User management**

This Breeze release has improved the user interface to make user and group management easier. You can also now define managers and team members for Breeze users, as well as customize the attributes you want to include on user profiles.

In addition, there are two new ways to add users and groups into Breeze. Both of these make user management much easier:

- Administrators can now import users and groups into Breeze using CSV files. See “Importing user and groups CSV files” on page 276.

**Account management**

Breeze now enables policies for management of passwords and administrator password resets that are consistent with industry best practices. These policies are enforced across the Breeze applications and allow administrators to align Breeze with their existing security policies.

For details, see Chapter 18, “Managing the Breeze Account,” on page 237.

**New features for Breeze authors**

You can now upload web pages, Captivate files, and other new file types to the Content library. In addition, there is a new interface for viewing presentations. For details, see Chapter 3, “Working with Content,” on page 35.
New features for Breeze trainers

Breeze training now includes the new curriculum functionality. With it, you can group courses and add Breeze content, presentations, events, meetings, and courses, as well as learning content external to Breeze, such as classroom training and required reading. You can also define prerequisites for a curriculum, and you can design your program so that users can “test out” of certain subjects by proving mastery in related subjects.

As users complete items in the curriculum, you can track their progress and generate reports, thereby ensuring that the curriculum meets the learning objectives.

For details, see Chapter 4, “About Training,” on page 57.

Accessing Breeze Manager

Every Breeze user receives an organization-specific Breeze Manager URL, along with a Breeze user name and a modifiable password, in an e-mail sent out by their organization’s Breeze administrator. You access Breeze Manager by typing this Breeze Manager URL in a browser window, and then logging in to Breeze, as described below.

Note: If you have Macromedia Breeze Presenter or Macromedia Captivate installed, you can also use the Publish option to upload content to the Content library. For more details, see the Breeze Presenter User Guide.

To access Breeze Manager:

1. In a browser window, enter the URL provided by your Breeze administrator or included in the Welcome email.
2. On the Login page, enter your Breeze user name and password.
3. Click the Submit button.

Breeze Manager appears. For a description of the Breeze Manager user interface, see Chapter 1, “Understanding the Workspace,” on page 15.

About Breeze documentation

In addition to the Breeze Manager User Guide, Breeze user documentation consists of the following guides:

Breeze Meeting User Guide for Hosts and Presenters/Participants  This guide is for participants and presenters in a Breeze Meeting. There are two versions: Breeze Meeting User Guide for Hosts and Presenters and Breeze Meeting User Guide for Participants. You can access these guides from within a Breeze meeting by selecting Meeting > Help.

Breeze Presenter User Guide  This guide is for Breeze users who use the Breeze PowerPoint plug-in, Breeze Presenter. It provides for installing the program, creating presentations, designing the look of presentations, adding audio, including quizzes, publishing to the Breeze server, and working with presentations in Breeze. You can access this guide by clicking Help from the Breeze menu in PowerPoint.
Additional Macromedia resources

More information is available from the following websites:

**Breeze Resource Center**    The Breeze Resource Center is updated regularly with tutorials, simulations, best-practices information, and links to procedures. Check the website at www.macromedia.com/resources/breeze.

**Breeze Product Center**    The Breeze Product Center is updated regularly with the latest information on Breeze, including FAQs, white papers, testimonials, and tips. Check the website often for the latest news on Breeze at www.macromedia.com/software/breeze.

**Breeze Support Center**    The Breeze Support Center contains the latest support information, including TechNotes, Breeze presentation tutorials, and support program details. Check the website often for the latest Breeze support information at www.macromedia.com/support/breeze.

**Breeze Developer Center**    The Breeze Developer Center provides information for Breeze developers on extending Breeze and developing Breeze applications, at www.macromedia.com/devnet/breeze.
CHAPTER 1
Understanding the Workspace

The Macromedia Breeze Manager is the web application that enables users to manage content and create meetings, events, courses, and much more.

The full Breeze Manager application user interface consists of seven tabs (also called *pages*), each associated with a particular function and application, as the following illustration shows. This chapter describes the tabs, and also explains some features and concepts that are common across Breeze.
**Breeze tab access**

You might not see all seven tabs on your own interface. This is because your organization has not purchased the applications associated with particular tabs. If your organization has purchased a specific Breeze application, it is visible in your Breeze Manager window, but you might get an error message when you click on the tab to access it. If this happens, it means that you were not assigned access privileges for this application. Breeze is a permissions-based system, so you cannot access applications for which you do not have permission, although these applications are available to other Breeze users in your organization. The same is true for any file or folder that you cannot access. For example, although you can access your own folder on a specific tab, you might get an error message if you try to access one for which you do not have permissions.

A user gains access to a tab when an administrator assigns the user to a built-in group that has permission to access the tab. For a description of built-in groups, see “Built-in groups” on page 259.

**Breeze tab description**

The tabs and their associated applications are:

- **Home tab**, the only tab accessible to all Breeze Manager users. It enables users to perform various tasks related to their specific Breeze account. This chapter describes the Home tab in detail. See “Home tab” on page 17.

- **Content tab**, for users to manage content that can be used for presentations, training, meetings, and seminars. The Content tab contains the Content library, a set of Content folders and files. In Breeze, users who create content are called authors. However, the Content tab is available for all users with appropriate access permissions. For information about working with content and the Content library, see Chapter 2, “About Content,” on page 29 and Chapter 3, “Working with Content,” on page 35.

- **Training tab**, associated with courses and curriculums. If you use this tab to create courses and curriculums, Breeze refers to you as a training manager. For information about the Training tab and everything you can use it for, see Chapter 4, “About Training,” on page 57, Chapter 5, “Working with Courses,” on page 63, Chapter 6, “Working with Training Curriculums,” on page 81, and Chapter 7, “Managing the Training Library,” on page 109.

- **Meetings tab**, used to create and manage meetings. If you can create meetings that appear on this tab, you are a Breeze Meeting host. For information, see Chapter 8, “About Meetings,” on page 119, Chapter 9, “Working with Meetings,” on page 127, and Chapter 10, “Managing the Meetings Library,” on page 143.

- **Seminar Rooms tab**, used to create and manage seminars, a special type of Breeze Meeting with its own requirements. This tab is accessible to seminar hosts; for details, see Chapter 11, “About Seminars,” on page 159, Chapter 12, “Working with Seminars,” on page 165, and Chapter 13, “Managing the Seminar Library,” on page 181.
• Event Management tab, associated with events, which can be any Breeze Meeting, training, presentation, or seminar that requires registration and special reporting requirements. Breeze event managers use the Event Management tab to create and manage events. For information, see Chapter 14, “About Events,” on page 195, Chapter 15, “Working with Events,” on page 201, and Chapter 16, “Managing the Event Library,” on page 221.

• Administration tab, a critical part of the Breeze Manager and visible to all users. However, the Administration tab is not accessible to anyone except the Breeze administrators, the users responsible for performing all of the tasks associated with Breeze account and user management functions. An administrator adds new users to Breeze, assigns permissions, customizes the look of the Breeze interface, and performs numerous other tasks. If you are an administrator, see Chapter 17, “About Administration,” on page 235, Chapter 18, “Managing the Breeze Account,” on page 237, and Chapter 19, “Working with Users and Groups,” on page 255.

Home tab

No matter what functions you use Breeze for, if you have a Breeze account, the Home tab (also referred to as “Home page”) is always accessible to you. It is the tab that is active as soon as you log in to Breeze (for the procedures on accessing Breeze, see “Using Breeze Manager” on page 7). You can think of this page as your base of operations. From here, you join any Breeze meetings or events for which you are scheduled, create any meetings or events for which you have permission, locate information and resources, and manage your Breeze account, as explained in this chapter.

Home tab user listings and links

Below the Breeze Manager tabs is a row of links, each of which directs you to a list with information that is relevant only to you. When you display one of these lists, you can often perform additional actions. For information on these actions, see the following sections:

• “My Training” on page 17
• “My Scheduled Meetings” on page 18
• “My Scheduled Events” on page 18
• “Manager Reports” on page 18

My Training

Clicking the My Training link displays a list of the training courses or curriculums in which you are enrolled. To get details about any item on the list, click the name in the list to view a profile specific to that course or curriculum.

The same information is displayed in list form under Training I’m Enrolled In on the Home page. However, clicking My Training allows more of the list to be displayed and also contains My Completed Training, a link at the top of the page that you can click to see a list of training classes that you’ve completed.

Alternatively, clicking the More link below the Training I’m Enrolled In list brings you to the same page that appears when you click the My Training link.
My Scheduled Meetings

Clicking the My Scheduled Meetings link displays all of the current and expired Breeze Meetings in which you are involved; your involvement is shown in the Role column. Although your current and future meetings are also displayed in list form under My Scheduled Meetings, clicking My Scheduled Meetings also displays a list of expired meetings. Clicking the Enter link brings you into the meeting room, where you can join a live Breeze Meeting or view a presentation from a past meeting. Click the meeting name to display the meeting details and an Enter Meeting Room button so that you can join the meeting.

In addition, you can click the More link below the My Scheduled Meetings list to view the same page that appears when you click the My Scheduled Meetings link.

For information and instructions on both joining and creating meetings, see Chapter 8, “About Meetings,” on page 119, Chapter 9, “Working with Meetings,” on page 127, and Chapter 10, “Managing the Meetings Library,” on page 143.

My Scheduled Events

Clicking the My Scheduled Events link displays a list of all the events for which you are registered, as well as all your expired events. Just as you can join a meeting at any time, you can view an event at any time, regardless of whether or not it has expired, click Enter. For more information on joining events, see Chapter 15, “Working with Events,” on page 201.

Manager Reports

The Manager Reports link applies only to users who are managers. If you are a manager, you can click Manager Reports to display a list of all your direct reports. You can also select links to the training, meeting, and event reports for each of these individuals. From Manager Reports, you can click the link for a report type to see a list of all reports for this team member for this report type. You can then click the link for a given report to see the report information, and depending on the report you selected, you can click another link to see more specific information.

In addition, if any of the users you manage also has subordinates, you can click the direct report’s name to display a list of that person’s direct reports and the corresponding training, meeting, and event reports for each of them. In this way, you can view reports for all of the people who report to you either directly or indirectly.
Home tab actions

On the left side of the Home tab are two features that enable you to perform specific actions.

Create

The Create menu enables you to create new occurrences of those functions for which you have permission. For example, if you are a meeting host, the menu includes the New Meeting option. You can click New Meetings to start the Meeting wizard to create a new meeting.

Training managers can use the Create menu to create a new course or curriculum. To use the Create feature, click the appropriate link below the Create label to start the wizard you want to use.

Note: The Create menu displays create options only for those functions for which you have permissions. For example, if you are a training manager but not a meeting host, the New Meeting option does not appear in your Create menu.

Learn

The Learn menu has four links that are useful in learning Breeze:

• Getting Started: A list of Breeze manuals, including this guide, as well as procedures targeted to specific audiences.
• Breeze Manager Help: This guide, providing user information for the Breeze Manager web application.
• Breeze Resource Center: The Breeze Resource Center site is updated regularly with tutorials, simulations, best-practices information, and links to procedures.
• Breeze Documentation: The full set of documentation provided with Breeze 5, including information for administering, managing, and using Breeze applications.

Persistent features

A persistent feature is a feature that appears on every tab, so you can perform its associated function from anywhere within Breeze Manager, not only from the Home tab. Breeze Manager has four persistent features, located in the upper-right corner of the Manager window. The links for My Profile, Help, and Logout are to the left of your name, above the tab bar, and the Search Content input area is on the far right end of the tab bar.
My Profile

Clicking the My Profile link displays information about your Breeze account, as well as two additional links, Change My Password and Edit My Preferences.

User Information  The information displayed may vary depending on the information your Breeze administrator has defined for user profiles, but at the very least your first and last names, your login, and your e-mail address are listed. In addition, the following information also appears:

• Audio conference settings, which is telephone access information (your moderator code and client ID) for dialing into Breeze Meetings
  
  Note: The client ID is the customer identification number assigned by Premiere Conferencing. If your company uses another provider, this field has another name.

• Your manager’s name (if applicable)

• Your team members’ names (if applicable)

Change My Password  Click here to change your password. When you do, you are prompted once for your current password, and then twice for your new password.

Edit My Preferences  Click here to display a page that enables you to change your time zone and audio conference settings.

Group Memberships  Click here to display a list of all the groups to which you belong, including built-in groups.

Organization  Click here to display a page that displays your manager’s name and the names of all of your team members, if applicable.

Help

Clicking Help displays this manual as a set of Help topics, each of which corresponds to a chapter. You can click any one of these topics to see more specific information within a given chapter.

Logout

Click this link to exit from Breeze Manager. When you do, the Breeze Manager login page appears. Close the login page to exit from the application.

Search Content

You can enter keywords at the Search Content link to search the Content library for presentations, as well as meeting and seminar archives.

Note: The presentations themselves must be searchable for the Search feature to be operable. In addition, you must have permissions to view the content you are searching for.

To use Search Content, enter a keyword and click Search Content. You can also click Search Content without entering a keyword to set the search parameters to refine your search. For detailed information and instructions about how to use this feature, see “Searching the Content library” on page 36.
Breeze terms and concepts

If you are new to Breeze Manager, this section contains some terminology you might find helpful. For more information, see the following sections:

- “Meetings and seminars versus meeting rooms and seminar rooms” on page 21
- “Breeze content” on page 21
- “Breeze events” on page 22
- “Breeze reports” on page 22

Meetings and seminars versus meeting rooms and seminar rooms

A Macromedia Breeze Meeting is an online real-time meeting in which a presenter can show slides or multimedia presentations, share pages, chat, and broadcast live audio and video. A Breeze Meeting takes place in a Breeze meeting room, a Macromedia Flash application that you run in a browser window by using Macromedia Flash Player. The meeting room continues to exist even after the meeting is over.

In addition, depending on the pricing model your organization has purchased, you might or might not be able to enter a meeting if the meeting is not live. In some cases, only the host can enter the meeting room when the meeting is not live. In other cases, you can enter the meeting room when the meeting is not live if enough meeting room spaces are available across the system at the moment you enter.

You create the meeting room with Breeze Manager. In Breeze Manager, all Breeze meeting rooms are contained in the Meeting library. For more details about the library, as well as procedures for joining, participating in, and setting up meetings, see Chapter 9, “Working with Meetings,” on page 127.

A Breeze seminar is a unique kind of Breeze Meeting, with its own licensing requirements and attributes. A seminar room is comparable to a meeting room, that is, a Flash application that runs in a browser window. Unlike some meeting rooms, however, at least one Breeze presenter or host for the seminar must be in the room in order for others to enter, even if the seminar is a public meeting. A seminar ends if all the presenters and hosts exit from the room. Because of their unique requirements and format, seminars have a dedicated Breeze Manager tab named Seminar Rooms, as well as their own Seminar library. A seminar ends if all meeting users with presenter or host rights exit from the meeting. For general information on seminars, see Chapter 11, “About Seminars,” on page 159.

Breeze content

Any file or folder that is stored in the Breeze Content library is referred to in Breeze as content. Content is synonymous with information and accessed from the Content tab of Breeze Manager.

The Content library is associated with Breeze authors (see “Breeze Manager users” on page 7), the only users who can upload files to this library. For information about the library, the types of files it contains, and how to use it, see Chapter 3, “Working with Content,” on page 35.
Breeze events

In Breeze, the term *event* means a large-scale web meeting, presentation, seminar, or training that requires registration and has unique reporting requirements. As such, the Breeze Event Management functionality contains special features that are exclusive to events.

For more information about events, see Chapter 14, “About Events,” on page 195. For procedures for performing all the activities involved in holding an event, see “Creating an event” on page 201.

Breeze reports

You can create diverse types of reports in Breeze Manager for information about individual meetings, courses, curriculums, seminars, and users, among others. You can add report filters to streamline report information, and if you are a manager, you can view reports for your team members. For information about manager reports, see “Manager Reports” on page 18. For background information and procedures on reports for a specific function, see the report description in the relevant chapter of this manual.

Breeze icons

Breeze Manager uses icons to represent meetings, seminars, presentations, courses, and curriculums. To identify these events, see the following table:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Content" /></td>
<td>Breeze content includes files such as Adobe PDF files or Microsoft Word documents that are used with Breeze meetings, seminars, presentations, or training.</td>
</tr>
<tr>
<td><img src="image" alt="Course" /></td>
<td>A Breeze course is a presentation that is associated with a group of enrolled learners with tracking for each individual. The course can be used independently or as part of a curriculum.</td>
</tr>
<tr>
<td><img src="image" alt="Curriculum" /></td>
<td>A Breeze curriculum is a group of courses and other learning content that guides students along a learning path. Curriculum can include Breeze content, presentations, meetings, seminars and external content such as classroom sessions and reading lists.</td>
</tr>
<tr>
<td><img src="image" alt="Event" /></td>
<td>A Breeze event includes registration, invitations, reminders, and reporting. Events usually involve a large number of participants and are built upon a Breeze meeting, seminar, presentation, or training.</td>
</tr>
<tr>
<td><img src="image" alt="Meeting" /></td>
<td>A Breeze meeting is an online real-time meeting in which a host or presenter can show slides or multimedia presentations, share screens, chat, and broadcast live audio and video.</td>
</tr>
<tr>
<td><img src="image" alt="Seminar" /></td>
<td>A Breeze seminar is similar to a Breeze meeting, but seminars are usually conducted for one-time or infrequent meetings that have at least 50 participants and will include little audience participation or interaction.</td>
</tr>
<tr>
<td><img src="image" alt="Archive" /></td>
<td>An archived file is a recorded Breeze meeting or seminar, which users can view at their convenience.</td>
</tr>
</tbody>
</table>
Global Breeze Manager features

This section contains descriptions of three features that apply across multiple Breeze Manager tabs:

- “Custom URLs” on page 24
- “Setting and removing report filters” on page 25
- “Downloading reports” on page 28
Custom URLs

When you add a new piece of content, a new meeting, a new course or curriculum, a new seminar, or a new event, you can include a custom URL. This URL is unique across the entire Breeze account and is meaningful for the item you are creating. For example, the custom URL might be your name or the name of your organization:

![Custom URL example](image)

**Custom URL use**

A custom URL can only be tied to the specific item it is included in, and you cannot use it for any other Breeze function. For example, if you use `/yourname` as the custom URL for a piece of content, you cannot use it for another piece of content or for a meeting, nor can any other user who shares your Breeze account use it. If you delete the content that includes the custom URL, however, the custom URL becomes available for re-use.

If another Breeze user is currently using the custom URL, you receive an error message when you enter the URL. In this case, depending on the circumstances (for example, if another user was using your full name for a custom URL), you can check with your administrator to see who is using the URL, since the administrator can verify this for you.

**Custom URL rules**

When you create a custom URL, use the following rules:

- You cannot edit a custom URL after you create it.
- You cannot use digits (0 to 9) at the beginning of a custom URL.
- Custom URLs cannot contain any punctuation, spaces, or control codes.
- Custom URLs cannot contain uppercase letters.
- Do not use any of the terms in the following table, because they are keywords reserved by the Breeze server.

<table>
<thead>
<tr>
<th>account</th>
<th>curriculum</th>
<th>input</th>
<th>search</th>
</tr>
</thead>
<tbody>
<tr>
<td>admin</td>
<td>data</td>
<td>macromedia</td>
<td>seminar</td>
</tr>
<tr>
<td>administration</td>
<td>default</td>
<td>meeting</td>
<td>send</td>
</tr>
<tr>
<td>api</td>
<td>download</td>
<td>metadata</td>
<td>service</td>
</tr>
<tr>
<td>app</td>
<td>event</td>
<td>monitor</td>
<td>servlet</td>
</tr>
<tr>
<td>archive</td>
<td>fcs</td>
<td>open</td>
<td>soap</td>
</tr>
</tbody>
</table>
Global Breeze Manager features

• breeze
• close
• com
• common
• console
• content
• course
• flash
• gateway
• go
• home
• hosted
• idle
• info
• output
• presenter
• producer
• public
• publish
• report
• sco
• source
• src
• stream
• system
• training
• user
• xml

Setting and removing report filters

Where appropriate, you can further define the information you see on a particular report by specifying report filters. When the filters are operable for a given report, the Report Filters link appears above the report display. You can set any or all of the following criteria to refine your reports:

Time period A date range for the information in that report. For example, if you select a date range for the By Slides report, it shows only the slides that were viewed within that time frame.

Team members (for managers only) The data on the report only applies to the people who are the manager’s subordinates, either as direct reports or all reports (including both direct and indirect subordinates). This distinction depends on which option was selected: Show Data From People I Manage Directly or Show Data From People I Manage Directly And Indirectly.

Groups The data on the report only applies to the members of a specific group that participated. You can select more than one group, and then deselect any group.

Report filter implications

It’s important to remember that any filters you set apply to all reports that you create, both for the specific report and for any other Breeze functionality. For example, if you create a training report after you set filters for a content report, the filters you set apply not only to the content report, but to the training report, as well. This rule includes any date range you might have specified. If you do not clear a date range filter that you set for one particular report, the data you obtain for any Breeze functionality always applies exclusively to that date range.
To clear filters you have set, click Reset on the Set Report Filters page.

To set report filters:

1. Follow the appropriate procedure to access the information page for the report you want (for example, the Content, Meeting, Course Information page, and so on) for the file whose report filters you want to set.

2. On the information page, click the Reports link above the information title bar for the information page you opened.

   A set of report links appears above the title bar, with Summary highlighted, and the Summary report for this meeting appears below the information heading.

3. Click the report type for which you want to set filters.

   The data for the report type you selected appears in the Breeze Manager window.

4. Click the Report Filters link, to the right of the No Filters Have Been Set label above the report display.

   The Set Report Filters page appears.

5. Do one of the following:
   - To change the date range for this report data, go to step 6.
   - To select team member reports, go to step 7.
   - To select groups, go to step 8.
6. Do the following to set the date range filters:
   a. Select the From and/or To check boxes, as appropriate.
   b. From the pop-up menus, select the start and/or end dates and times, as appropriate, to set
      the parameters for the report data you want.
   c. If you do not want to set any more filters, click Save.
      The report page reappears with data for the dates and times you specified shown in the
      appropriate columns and the date range specified above the display bar.
   d. To set filters to display your direct reports or all of your subordinates (for managers only), go
      to step 7.
      To set filters for groups, go to step 8.
    7. Click the appropriate button (Show Data From People I Manage Directly or Show Data From
       People I Manage Directly And Indirectly) for the team members you want to see.
       ■ If you do not want to set any group filters, click Save.
       The report page reappears with the following text above the display bar, depending on your
       selection: “Show data from people I manage directly” or “Show data from people I manage
       directly and indirectly”. The report-specific information for these participants appears in the
       appropriate columns.
       ■ To set filters for groups, go to step 8.
    8. Click the Add/Remove Groups link.
       A list of all the groups in the system appears.
    9. Select the check box to the left of each group that you want to see data for in your report, and
       then click Save.
       The Set Report Filters page reappears with the names of all the groups you selected after the
       Filter Settings label. If you previously set other filters, the names of these appear as well.
   10. Click Save at the bottom of the Set Report Filters page.
       The report page reappears with the names of the groups you selected, as well as any other filters
       you set, above the display bar. The filtered, report-specific information for these participants
       appears in the appropriate columns.

To remove report filters:
   1. From the report page, click the Report Filters link.
      The Set Filters page appears, with your settings.
   2. Do either of the following:
      ■ To clear all filters, click Reset.
         The report page reappears with the filters removed and the text “No Filters Have Been Set.”
         The data shown in the report no longer applies to this filter.
      ■ To clear a specific filter, clear the check box and click Save; if it’s a group, click Add/Remove
         Groups, clear the group check box, and click Save.
         The report page reappears with the filters removed. The data shown in the report no longer
         applies to the filters that you removed.
**Downloading reports**

If the Download Report Data button appears for a specific report, you can click it to export all the report data to a comma separated values (CSV) file. After you do so, you can either save or open the report. If you are running Breeze Manager in an Internet Explorer browser and choose to open the report, Windows automatically opens it in Excel. In this case, you must double-click each cell to see its information.

Another option is to save the CSV file to your desktop, select Notepad from the Accessories menu (select Start > Accessories > Notepad), and open the file from Notepad, which makes it easier to read.

In addition, if the Printable Version button appears for a report, you can click the button to export the report to a browser window.
CHAPTER 2
About Content

In Macromedia Breeze, the word content describes any file that contains instructional, promotional, or other information that you deliver in meetings, training, seminars, or presentations. Content can consist of various types of files; for a description of these files, see “Types of files in the Content library” on page 29.

All such content is contained and organized in a directory of folders called the Content library, accessed from the Content tab of Breeze Manager. This chapter provides background information that you need to know when working with content in the Content library.

About the Content library

The Content library is the place where Breeze authors upload their content files. In addition, since the Content library is permissions-based, it is from here that you assign permissions to any content files for which you have Manage permissions. Anyone to whom you have assigned the proper permissions can retrieve and view your content folders on demand, and if you permit them, manage or publish contents to these folders as well. For information about the different types of permissions possible for the Content library, see “About Content library permissions” on page 31. For information about assigning permissions, see “Shared Content folder” on page 33.

Types of files in the Content library

All content in the Content library must be one of the following types of media:

• A single PPT file (it is converted to a Macromedia Breeze Presentation file from Macromedia Breeze Presenter)
• A single SWF file
• A single HTML file
• A single Captivate SWF file
• Captivate content published through the Macromedia Captivate application
• Presenter content published through the Presenter plug-in
• Presenter content packaged as a ZIP file
• An old Breeze 4.1 presentation packaged as a ZIP file (downloaded for a 4.1 server)
• A ZIP file that contains old pods (pod.swf, pod.asc)
• A ZIP file that contains multiple SWF files and extra files (images, XML files, and so on) and one file called index.swf that will be loaded first
• A ZIP file that contains simple Macromedia Authorware content (one HTM file, one AAM file, and extra Authorware files)
• A ZIP file that contains multiple HTM or HTML files and extra files (images, SWF, and so on) and one file called index.htm or index.html
• A Macromedia Flash Video file (FLV file)
• A single image (JPEG, GIF, or PNG)
• A single audio file (MP3)

Each file type is represented by a separate icon in the Content library; see “Breeze icons” on page 22.

A Macromedia Breeze Presentation is a multimedia presentation that contains slides, streaming audio, synchronized animation, and navigation controls. An author creates it from Microsoft PowerPoint slides with Macromedia Breeze Presenter and publishes the presentation to the server. Any presentation you created in Breeze 4.1 is still available to you in Breeze 5. However, to take advantage of the Breeze 5 features, you must republish the presentation to the Breeze 5 server. For instructions about how to publish presentations, see the Breeze Presenter User Guide. A packaged content file is a ZIP file that contains any of the other file types permissible for the Content library.

Guidelines for using AICC content

To upload Aviation Industry CBT Committee (AICC) content into the Content library, you must zip up the files into a content package and upload it through the New Content interface in the Breeze Manager (see “Adding new content to the Content library” on page 44).

Use the following guidelines when you create AICC content:

1. The content must be able to report either "complete" or "passed" to indicate that the user has finished interacting with the content.
2. The content package must have a file named index.htm or index.html that the server relies on to launch the content.
3. Content must report "Incomplete" on all communications until the user has completed the content. Some AICC content reports "Failed" until the user completes, however, when Breeze receives the "failed" message, assume that the content is complete and count that as an attempt for a user, which will result in incorrect data.
About Content library permissions

The ability to view, manage, and publish content to various folders in the Content library is determined by the groups a user belongs to and the individual permissions that have been assigned to a user for specific files and folders. Unlike other Breeze libraries, Content library files permissions can differ from the parent folder permissions.

You can access only the folders on the Content tab that you have created or the folders to which you have been assigned View, Publish, or Manage permissions. These permissions are defined as follows:

- **View**  Users or groups with a View permission setting for a folder can view any content within that folder (this includes accessing the content in a Macromedia Breeze Meeting). A View permission setting for an individual file allows view access for that particular file.

- **Publish** Users or groups with a Publish permission setting for a folder or presentation can publish, update, and view presentations, as well as view reports for files in that folder. However, these users must also be members of the built-in Author group, as well as have Publish permission, to publish content to this folder. For more information about this group and Publish permissions, see “Content permissions for Built-in groups” on page 32.

- **Manage** Users or groups with a Manage permission setting for a folder or file can view, delete, move, and edit the file or folder, view reports for files in that folder, set permissions for the file or folder, and create new folders. However, they cannot publish to that folder.

- **Denied** Users or groups with a Denied permission setting for a folder or file cannot view, publish, or manage this folder or file.

For more information about how permissions are resolved for a user who belongs to multiple groups and has multiple permissions, see “Multiple permissions precedence” on page 269.

Breeze content access through a browser

Although all folders within the Shared Content and User Content folders are visible to you, you can open only the files or folders for which you have access permission. If you try to open a file or folder for which you do not have permission, you get an error message.

However, if you access Breeze content directly in a browser window by using a URL, you may or may not be able to view the content. One of the following situations occurs:

- If the Breeze content is accessible to the public or you are logged in to your Breeze account, you see the Breeze content displayed in the browser window.

- If the Breeze content has restricted access and you are not currently logged in to your Breeze account, the Breeze login page appears and you must log in before you can view the file. Even if you have a valid Breeze account, you cannot log in and view the file unless you have permission to do so.
Content permissions for Built-in groups

The Breeze server recognizes six default permission groups, each of which is associated with a different Breeze library. Each member of a Built-in group has an individual user folder within the corresponding library. You cannot change the permissions for these groups, but you can extend them by assigning individuals or groups to more than one Built-in group. In addition, the administrator can create custom groups, and assign these groups the appropriate permissions to specific library folders. The Built-in groups are as follows:

- Administrators
- Meeting hosts
- Training managers
- Seminar hosts
- Event managers
- Authors

The Authors group is associated with the Content library; no one can publish anything at all to the Content library unless they are authors. In addition to membership in the Author group, a user must also have Publish permissions for the file or folder to which they are publishing content. When a user is assigned to the Author group, Breeze automatically assigns them an individual User Content folder within the library to which they can publish (upload) content. They also have Manage permissions for this folder, which enables them to assign Publish permissions for this folder to other authors. See “Structure of the Content library” on page 32 and “About Content library permissions” on page 31.

Structure of the Content library

The Content library is structured as the following illustration shows.
Shared Content folder

By default, only administrators have Manage permissions for the Shared Content folder. Administrators can create folders in the Shared Content folder and can assign Manage permissions to other users for these folders. These users, who may or may not be authors, can then place content in the Shared Content folder, which multiple users can access and manipulate. However, although any Breeze user with Manage permissions can manage a Shared Content folder, only authors can create new content in these folders. To create new content, a user must have Publish permission, and only authors can be assigned this permission.

User Content folder

The User Content folder includes one folder for each author. When a user is assigned to the Authors Built-in group, Breeze creates an individual user folder within the User Content folder. Administrators can manage all folders in this folder, whereas authors can only manage and publish to their own individual folder. Other users who are not authors cannot manage folders in the User Content folder unless they have been assigned Manage permissions, either by the administrator or by the folder’s owner; nor can such users create (that is, publish) new content in any User Content folder they manage; only authors can do this.

My Content folder

Each author has an individual content folder within the User Content folder. The actual name of the folder is the author’s login name. The My Content folder is a shortcut to an author’s specific folder in the User Content folder. Authors can only manage and publish to their individual My Content folders unless they were assigned Manage and Publish rights to other Content library folders by the administrator or users with Manage rights for these folders. Users can view files or folders only if they were assigned View permissions.

Content library activities

The following table lists the tasks that you can perform within the Content library.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigate content folders</td>
<td>Open a folder and move up and down through folder levels</td>
<td>“Navigating the Content library” on page 35</td>
</tr>
<tr>
<td>Search the Content library</td>
<td>Locate a piece of content in the library by using keywords</td>
<td>“Searching the Content library” on page 36</td>
</tr>
<tr>
<td>View content file properties</td>
<td>View properties about a content file</td>
<td>“Shared Content folder” on page 33</td>
</tr>
<tr>
<td>View content</td>
<td>Open a content file for viewing, such as a presentation or a Captivate simulation</td>
<td>“Breeze content access through a browser” on page 31</td>
</tr>
<tr>
<td>View a Macromedia Breeze Presentation</td>
<td>See a presentation that was uploaded from the Macromedia Breeze Presenter</td>
<td>“Viewing a Macromedia Breeze Presentation” on page 39</td>
</tr>
<tr>
<td>Task</td>
<td>Description</td>
<td>See</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------------------------------------------------</td>
</tr>
<tr>
<td>Publish/update presentations</td>
<td>Convert PowerPoint presentations to a Flash file and publish to the Breeze server</td>
<td>See Breeze Presenter User Guide</td>
</tr>
<tr>
<td>Upload content</td>
<td>Upload content to a Content library file or folder</td>
<td>“Adding new content to the Content library” on page 44</td>
</tr>
<tr>
<td>Move content</td>
<td>Move a content file to another Content library folder</td>
<td>“Moving a content file or folder” on page 46</td>
</tr>
<tr>
<td>Delete content</td>
<td>Delete a piece of content from the Content library</td>
<td>“Deleting a content file or folder” on page 46</td>
</tr>
<tr>
<td>Edit content properties</td>
<td>Change a content file summary</td>
<td>“Editing content file properties information” on page 47</td>
</tr>
<tr>
<td>Send an e-mail message that contains a link</td>
<td>Provide users with a URL for viewing content</td>
<td>“Using e-mail to send a content URL for viewing” on page 47</td>
</tr>
<tr>
<td>Download content</td>
<td>Download a content file to your computer</td>
<td>“Downloading content” on page 48</td>
</tr>
<tr>
<td>Set content permissions</td>
<td>Assign permissions to a content file</td>
<td>“Setting custom permissions for content files and folders” on page 51</td>
</tr>
<tr>
<td>Create folders</td>
<td>Add new folders to the Content library</td>
<td>“Creating a content folder” on page 45</td>
</tr>
<tr>
<td>Move folders</td>
<td>Move a content folder to a different location within the Content library</td>
<td>“Moving a content file or folder” on page 46</td>
</tr>
<tr>
<td>Delete folders</td>
<td>Delete content folders within the Content library</td>
<td>“Deleting a content file or folder” on page 46</td>
</tr>
<tr>
<td>Change access control</td>
<td>Edit user and group permissions.</td>
<td>“Modifying file or folder permissions” on page 53</td>
</tr>
<tr>
<td>View Dashboard</td>
<td>View statistical information about your content files</td>
<td>“Viewing the Content Dashboard” on page 54</td>
</tr>
<tr>
<td>View reports</td>
<td>View usage reports about your content</td>
<td>“Content reports” on page 55</td>
</tr>
</tbody>
</table>
CHAPTER 3
Working with Content

The Content tab of Macromedia Breeze Manager is your interface for managing content. Working with content not only means creating, editing, and managing files within the library, but also adding and viewing content media. This chapter contains instructions on Content library navigation and file management, as well the procedures needed to view presentations and create content reports.

Navigating the Content library

You can navigate the Content library if you know the location of the content you want to view or if you want to browse the Content library.

Navigation controls exist for the following tasks:

• “Opening a folder to view its contents”
• “Moving up one directory level”
• “Returning to any higher parent directory level”

Opening a folder to view its contents

To view the contents of a folder, click the folder name in the display list to open it.

To open a content folder:

• Click the name of the folder.

The folders and files within that content folder appear, and the name of the selected folder appears in the navigation trail at the top of the browser window.

Moving up one directory level

Use the following procedure to move to the parent folder, the folder one level above the current folder.

To move up one folder:

• Click Up One Level on the navigation bar above the content list.

The folders and files within the parent folder appear. The name and location of the parent folder appear in the navigation trail at the top of the browser window.
Returning to any higher parent directory level

Above the navigation bar is a trail of navigation links, called the navigation trail, which indicates your current location in the directory structure. You can move to any parent folder (including the one immediately above the current folder) by clicking this folder’s name in the navigation trail.

To return to any parent folder:
• Click the name of the parent directory in the navigation trail above the navigation bar.
  The folders and files within the higher parent directory appear. The name and location of the parent folder appear in the navigation trail at the top of the browser window.

Searching the Content library

You can quickly locate any Breeze content to which you have access permission by using keywords to search the Content library. When you use the search option, Breeze searches any of the following fields, as applicable:
• Title
• All slide content

You can also specify criteria to narrow your search and display your search results:

Show This option allows you to filter your search results by content type.
Display This option defines how many matches to display on a page. The default is 5, but you can change it to 10, 15, or 20.

To use keywords to search for content information:
1. Type one or more keywords into the Search Content text field in the upper-right corner of the Breeze Manager window, on the right side of the menu bar.
2. Click Search Content.
  The browser window shows the following for any content that contains your keywords:
  ■ Name
  ■ Description
  ■ File preview

You can click a specific filename and view its properties, or open the file to view the content. For information about properties, see “Viewing the properties of a content file” on page 37. For information about opening the file, see “Viewing Breeze content from a search list” on page 38. In addition, if this content is a presentation, Breeze displays a specific slide number that you can click to find the word that matches your keyword.
To refine your search criteria:
1. Click Search Content.
   A bar appears with three text fields: Show, Display, and Search For.
2. To change the Show default, select the content type you want to search for from the Show pop-up menu.
3. To change the number of matches that display per page, select how many results you want displayed on each page from the Display pop-up menu.
4. If applicable, type a keyword in the Search For text box and click Go.

Viewing the properties of a content file
Every content file has a Content Information page that displays the following properties for each piece of content:

Title  The title of the content.

Disk usage  The approximate file size of the content in kilobytes.

Permissions  The permissions for the content. If no specific permissions are set, the content inherits the permissions of the folder in which the content is contained. The values here are Custom (if the permissions were changed from those of the parent folder), or Same as parent folder (if the permissions were not changed).

URL for Viewing  The URL to view the content. You can click this URL to view the content directly, or you can enter the URL in the address text box of an open browser window.

Summary  The summary that describes the content.

Language  The language of the content.

Links  The course, curriculum, meeting, event, or seminar that this content is linked to. The content may have multiple links, or none at all.

You can also edit the content profile; for information, see “Editing content file properties information” on page 47.

To view content properties:
1. Click the Content tab at the top of the Breeze Manager window.
2. Locate the content you want to view; for information, see “Navigating the Content library” on page 35.
3. Click the content title.
   The Content Information page appears.
Viewing Breeze content

To view Macromedia Breeze Presentations, Flash content, or Flash Video files, you must have the appropriate version of Macromedia Flash Player. For more information, see “System requirements” on page 9. You can view the contents of a Content library file, including a Breeze Presentation, in one of the following ways:

- Viewing Breeze content from the Content library
- Viewing Breeze content from a search list
- Viewing Breeze content in a browser window

In addition, if the content you want to view is a Breeze Presentation, see “Viewing a Macromedia Breeze Presentation” on page 39.

Viewing Breeze content from the Content library

You can open content for viewing from within Breeze Manager after you browse to it in the Content library.

To view a content file from the Content library:

1. Click the Content tab at the top of the Breeze Manager window.
2. Browse the Content library, and locate the file you want to view; for information, see “Navigating the Content library” on page 35.
3. Click the name of the file to view its Content Information page.
4. Click the file’s URL for Viewing link.

A new browser window appears, displaying the selected file or presentation.

Viewing Breeze content from a search list

You can open content from within Breeze Manager from the Search Results page. For instructions, see “Searching the Content library” on page 36. This procedure also explains how you can refine your search.

Viewing Breeze content in a browser window

You do not have to open Breeze content from within Breeze Manager. When you have the URL for viewing the file, you can also browse to it directly from any browser window.

You can obtain the URL for viewing the file from the Content Information page in Breeze Manager, from the individual who is presenting the content, or from another viewer. For more information, see “Viewing the properties of a content file” on page 37. However, if the content is not publicly accessible, you might need to log in before you can view the file. For more information, see “Breeze content access through a browser” on page 31.
To view a file or presentation directly in a browser window:

1. Open a browser window.
2. Enter the URL for viewing the content in the browser URL address text box or click a link received in an e-mail.

The Breeze content appears in the browser window.

Viewing a Macromedia Breeze Presentation

A Macromedia Breeze Presentation is a multimedia presentation that contains slides, streaming audio, synchronized animation, and navigation controls. When you open a presentation for viewing, a new browser window opens and the presentation begins to load. Use the procedures in this section to work with the various presentation features:

- “Breeze Presentation layout” on page 39
- “Using the presentation Outline pane” on page 40
- “Using the presentation Thumb pane” on page 40
- “Viewing presentation slide Notes” on page 40
- “Using the presentation Search pane” on page 41
- “Using the presentation toolbar” on page 41
- “Changing to full-screen viewing mode” on page 42
- “Navigating between slides” on page 42
- “Navigating within the current slide” on page 43
- “Adjusting the presentation audio” on page 43

Breeze Presentation layout

The layout of a Breeze Presentation consists of the following parts:

Presentation  The main part of the window, which displays the presentation slides.

Presentation sidebar  A pane on the right side (default location) of the browser window that shows the name of the presentation, the presenter information, and the Outline, Thumb, Notes, and Search panes (if you added the panes to your theme).

Note: The Show sidebar to participants option must be selected for the sidebar to appear in the presentation. If the option is not displayed, click Full Screen at the bottom of the presentation and select Show sidebar to participants.

Presentation toolbar  A control bar at the bottom of the presentation, which gives you control over the presentation playback, audio, attachments, and page size.
Using the presentation Outline pane

Most presentations have an Outline pane on the sidebar. The Outline pane lists the title and duration of each slide. You can use the Outline pane to display information and to move to a specific slide in the presentation.

To view the Outline pane:
- Click the Outline pane in the sidebar on the right side.

The Outline pane contains the following features:
- The current slide is highlighted with a glow color. (You can change this color in the theme.)
- The entire slide title appears when the pointer is held over the title.
- The duration of the slide is shown next to each slide.
- You can move to any slide in the presentation by clicking the slide title in the Outline pane.

Using the presentation Thumb pane

Presentations can have a Thumb pane on the sidebar. The Thumb pane shows a small picture of each slide, the slide title and the slide duration. You can use the Thumb pane to see the contents of each slide quickly and to move to a specific slide in the presentation.

To view the Thumb pane:
- Click the Thumb pane in the sidebar on the right side.

The Thumb pane contains the following features:
- The current slide is highlighted with a glow color. (This color can be changed in the theme.)
- The entire slide title appears when the pointer is held over the title.
- You can move to any slide in the presentation by clicking the slide title in the Thumb pane.

Viewing presentation slide Notes

When you create a presentation in PowerPoint, you can enter notes for individual slides. If any slide Notes exist, they can be displayed in the Breeze Presentation.

Note: Slide Notes are optional.

When slide Notes appear, they are located on the right side of the presentation window. You cannot change the size of the slide Notes pane.

To view slide notes:
- Click the Notes pane in the sidebar on the right side.

The Notes pane contains the following features:
- The complete notes text is displayed. The text is unformatted and cannot be edited directly on the pane.
Using the presentation Search pane

Users can use the Search pane (if you have included it in your theme) to find specific text in a presentation. For example, in a presentation that serves as a company human resources handbook, a user might search for the word *vacation* to find text about vacation leave policies.

**To view and use the Search pane:**
1. Click the Search pane in the sidebar on the right side.
2. Type the text to search for directly into the text box.
3. Click Search.
   
   Search results are displayed below the text box. Click any slide title in the results list to display that slide.

Using the presentation toolbar

You can control the presentation appearance and playback by using the toolbar located at the bottom of the presentation.

The presentation toolbar includes the following items:

- **Play/Pause** lets you pause and then resume play of the current slide.
- **Back** lets you move to the previous slide in the presentation.
- **Forward** lets you move to the next slide in the presentation.
- **Slide progress bar** shows and controls the playback location within the current slide. The position marker arrow moves as the slide plays. You can drag the position marker arrow forward or back in the current slide to change your location within the slide playback. You can also click a specific location on the progress bar to move the slide marker position and slide playback to that position.
- **Current slide number** shows the slide number of the currently displayed slide and the total number of slides (e.g., slide 2 out of 10).
- **Status** shows the status of the current slide, such as Playing, Stopped, No audio, or Presentation complete.
- **Time** shows the current slide time and the total slide time as the slide plays (e.g., 00.02/00.05).
- **Audio volume** shows how loud the audio is set for the slide.
- **Attachments** displays a small window that shows any attachments (e.g., documents, spreadsheets, images, URL addresses, etc.) that were added.
- **Show/Hide Sidebar and Toolbar** toggles between showing and hiding the sidebar and toolbar.
Changing to full-screen viewing mode

You can view Breeze Presentations in two modes:

Normal is the default viewing mode. It includes the presentation toolbar at the bottom of the browser window and the presentation sidebar.

Full-screen is an optional viewing mode in which the presentation toolbar is removed and the size of the presentation slides increases to fill your browser window.

To toggle between viewing modes:
1. Click Full Screen at the bottom of the viewer.
   If the presentation outline was originally visible, the Breeze Presentation switches to full-screen mode without a presentation side.
   If a presentation outline is not originally visible, the Breeze Presentation switches to full-screen mode with no toolbar.
2. Click Full Screen again to change viewing modes.
   If presentation controls are originally visible, the Breeze Presentation switches to full-screen mode without a presentation outline or presentation toolbar. If a presentation toolbar is not originally visible, the Breeze Presentation switches to normal viewing mode with or without a presentation outline.

Navigating between slides

You can navigate between slides during playback by using either the presentation toolbar, or the presentation Outline or Thumb pane.

Note: The Outline pane and Thumb pane are optional; use the Theme Editor in Breeze Presenter to set panes for presentations.

To move to the previous slide by using the presentation toolbar:
• Click Previous Slide in the presentation toolbar.

To move to the next slide by using the presentation toolbar:
• Click Next Slide in the presentation toolbar.

To move to the next slide by using the presentation Outline or Thumb pane:
• Click the title of a slide in the presentation Outline or Thumb pane.
Navigating within the current slide

You can control the following options from within a slide:

- Pause and resume slide playback.
- Move to a specific location in the slide playback.
- Move backward in the slide playback.

**To pause slide playback:**
- Click Pause on the presentation toolbar.
  The button changes from Pause to Play.

**To resume slide playback:**
- Click Play on the presentation toolbar.
  The button changes from Play to Pause.

**To move to a specific location in the slide playback:**
- On the presentation toolbar, do one of the following:
  - Click a specific location on the slide progress bar to move the slide playback to that position.
  - Drag the position marker arrow on the slide progress bar forward or backward to change your location within the slide’s playback.

**To move to a specific location in the slide playback:**
1. Click the slide playback Back button on the slide progress bar to move your playback location backward by a specific amount.
2. Click Back multiple times to continue moving further back in the slide playback.

Adjusting the presentation audio

You can turn the presentation audio on and off by using the audio button on the presentation toolbar.

*Note:* Not all slides or presentations contain audio.

If a slide does not have any audio, the text No audio appears as the slide status on the slide progress bar. The slide still has an audio length and appears for that period of time before the next slide appears. The presentation speaker sets this time.

**To mute the audio:**
- Click Audio in the presentation toolbar and move the volume bar to the bottom.

**To enable the audio:**
- Click Audio on the presentation toolbar and move the volume bar up to increase the volume.
Adding new content to the Content library

You can add numerous types of files to the Content library. For more information on the files you can add, see “Types of files in the Content library” on page 29. This section also explains guidelines for uploading AICC content into the Content library.

Within Breeze Manager, you can add content to the Content library in the following ways:

**Uploading files from Breeze Manager**  For instructions, see “Uploading files from Breeze Manager” on page 44.

**Publishing Breeze Presentations from PowerPoint**  For instructions, see the *Breeze Presenter User Guide*.

**Publishing demonstrations and simulations from Macromedia Captivate**  You can add Captivate simulations to the Content library; for instructions, see *Using Captivate*.

In addition, if a presenter uploads content from a Breeze meeting room, the content is not placed in the Content library but in the Meetings library. To move uploaded content to the Content library, see “Moving and deleting meetings and meeting content” on page 147.

Adding content to be used for an event

If you plan to use an existing presentation for an event, you must republish the PowerPoint presentation to a Content library folder that is different than the folder that contains the original presentation. If you do not, all of the reporting information for the original presentation will be merged with the event-specific report data, and any event-specific data will be carried over into any future reports for the original presentation. For instructions about how to work with presentations, see *Breeze Presenter User Guide*. For instructions about how to work with events, see Chapter 14, “About Events,” on page 195 and Chapter 15, “Working with Events,” on page 201.

Custom URLs

When you add new content, you can include a custom URL. This URL is unique across the entire Breeze account and is meaningful for your content. For details about custom URLs and rules for their use, see “Custom URLs” on page 24.

Uploading files from Breeze Manager

Only members of the built-in Authors group with Publish permissions for a specific Content library folder can upload files to this folder.

**To upload a content file:**
1. Do either of the following:
   - To start from the Home tab, select New Content from the Create pop-up menu. Proceed to step 4.
   - To start from the Content tab, click the Content tab at the top of the Breeze Manager window and proceed to step 2.
2. Navigate to the location where you want to add the new content file; for more information, see “Navigating the Content library” on page 35.
3. Click New Content on the menu bar above the content list.
   The Enter Content page appears, with the appropriate folder displayed in the navigation trail. If you opened this page from the Home tab, the folder is your My Content user folder.
4. Click Browse under Select Content Information to locate the file you want to upload.
   The Choose File window appears.
5. Select the file you want and click Open.
6. Enter a title for the new content file (required) and a summary (optional) in the Enter Content Information text boxes.
7. (Optional) Enter a custom URL (if you do not assign a custom URL, the system automatically assigns one).
8. Click Save.
   The file is uploaded to the Breeze server and appears in the content folder.

Note: If you attempt to upload a file of an unsupported file type, the Enter Content page reappears with the message "Invalid file format selected." From here, you can repeat the procedure from step 4.

Managing content files and folders
Administrators and users with permission to manage a specific folder can organize the Content library by performing the following tasks:

- “Creating a content folder” on page 45
- “Moving a content file or folder” on page 46
- “Deleting a content file or folder” on page 46
- “Editing content file properties information” on page 47
- “Using e-mail to send a content URL for viewing” on page 47
- “Downloading content” on page 48
- “Changing a content folder name and description” on page 51
- “Setting custom permissions for content files and folders” on page 51

Creating a content folder
Administrators and users with permission to manage a specific folder can create folders and subfolders within it.

To create a content folder:
1. Click the Content tab at the top of the Breeze Manager window.
2. Navigate to the location where you want to add the new folder; for information, see “Navigating the Content library” on page 35.
3. Click New Folder on the menu bar above the content list.
4. Enter the name of the new folder on the new page that appears.
5. Click Save to create the new folder.
Moving a content file or folder

When you move a content folder, all of the contents within the folder also move to the new location.

To move a content file or folder:
1. Click the Content tab at the top of the Breeze Manager window.
2. Navigate to the location of the content file or folder that you want to move; for more information, see “Navigating the Content library” on page 35.
3. Select the check box to the left of the content file or folder that you want to move.
4. Click Move on the menu bar above the content list.
   The Move window appears, listing the items you have selected and letting you specify their new folder location.
5. Navigate to the folder location where you want to place the content file or folder by clicking the folder title or Up One Level.
   As you navigate to the new location, the new destination appears in the upper right of the Breeze Manager window.
6. Click Move.
   The Move Successful page appears, confirming that the move was successful.
7. Click OK.

Deleting a content file or folder

Before you delete any content, be aware of the consequences. When content files or folders are deleted, they are permanently deleted and cannot be retrieved. This means that any presentation, course, curriculum, meeting, or seminar that links to this content can no longer use this content. If possible, review the file properties to see what items (if any) are linked to the content and notify the individuals who are using this content. See “Viewing the properties of a content file” on page 37.

To delete a content file or folder:
1. Click the Content tab at the top of the Breeze Manager window.
2. Navigate to the file or folder that you want to delete.
3. Select the check box to the left of the file or folder that you want to delete.
4. Click Delete on the menu bar above the content list.
   The Delete page appears, listing the content files or folders you selected. If any items (for example, courses) link to this content, the message advises you that these links will be destroyed, and asks you to confirm that you want to permanently delete these files or folders.
5. Click Delete on the Delete page to permanently delete the selected items.
   The listing page displays without the files or folders you deleted.
Editing content file properties information

When you edit the properties of a given content file, you can modify the Breeze content title and summary information.

To edit content file properties:

1. Click the Content tab at the top of the Breeze Manager window.
2. Navigate to the content file whose properties information you want to edit; for more information, see “Navigating the Content library” on page 35.
3. Click the name of the content file in the content list.
   The Content Information page appears.
4. Click the Edit Information link in the navigation bar below the navigation trail.
   The Edit Information page appears.
5. Edit the content file properties information (either the content title or the summary).
6. Click Save.
   The Content Information page appears.

Using e-mail to send a content URL for viewing

Every content file in the Content library has a unique URL that lets users view the contents of the file. You can send this URL to other people by e-mail from within Breeze Manager.

When you use Breeze Manager to send the URL to other people, a unique version of the URL is created for each e-mail recipient. This process has the following advantages over sending the URL by pasting it into an e-mail message in your own e-mail client:

• You can request that a return receipt be sent to you when each e-mail recipient views the content file by using the web link sent to them. The recipients can be tracked because a unique URL for viewing was created for each one.
• The content is available to each recipient for viewing without requiring them to log in with a Breeze user name and password, even if the permissions for the content file in the Content library are not set for public viewing.

To send a content file URL by e-mail:

1. Click the Content tab at the top of the Breeze Manager window.
2. Navigate to the content file for which you want to send the e-mail notification; for more information, see “Navigating the Meetings library” on page 145.
3. Click the name of the content file.
   The Content Information page appears.
4. Click E-mail Link on the navigation bar.
   The E-Mail Link page appears.
5. Enter the e-mail addresses for all recipients in the To text box on the E-mail Link page. If necessary, separate multiple e-mail addresses with commas to create a unique URL for each e-mail recipient.

6. Edit the Subject and Message Body text boxes as needed.

   Note: Do not delete the information in the braces ("{(tracking-url)}") in the message body. This is a placeholder that is replaced with the content URL in the generated e-mail message.

7. Select the Generate a Return Receipt When Presentation Is Viewed check box to receive an e-mail notification when a recipient views the content file; otherwise, clear the check box.

8. Click Send.

   The e-mail notification is sent.

**Downloading content**

If you are an administrator or an author with Manage permissions for the content, you can download Content library files, including compiled Breeze Presentations, to your own computer from the Breeze server. This action lets you post the files to any web server or copy them to a CD. Depending on the circumstances, you can download any type of content as a ZIP file.

This section contains two procedures: the first describes how to download a content file other than a Breeze Presentation, and the second explains how to download a Breeze Presentation.

For instructions on downloading files, see the appropriate following procedure:

- “Downloading non-Presentation content files” on page 48
- “Downloading Breeze Presentations” on page 49

**Downloading non-Presentation content files**

Authors who have Manage permissions can download content files to their computers. For the types of files you can download, see “Adding new content to the Content library” on page 44. If you download a ZIP file, you must extract it using the unzip utility on your computer.

**To download a file:**

1. Click the Content tab.

2. Navigate to the content file that you want to download.

   For more information, see “Searching the Meetings library archives” on page 146.

3. Click the name of the content file.

   The Content Information page appears.

4. Click the Download Content link on the navigation bar.

   The Download Content page appears.

5. Right-click the Download File link, and select Save Target As.

   A browser download dialogue box appears and asks where you want to save this file.

6. Navigate to where you want to save the file in the Save As dialog box.
7. If necessary, replace the default filename.
8. Click Save.

A Download Progress dialog box appears, showing the download progress. When the download is complete, you can immediately view or extract the content on your computer.

**Downloading Breeze Presentations**

You can download a Breeze Presentation in either of the following formats:

- The complete Breeze Presentation as a ZIP file
- The PowerPoint source files, which consist of the PowerPoint (PPT) source file and the audio/timing source file (PPC)

**Downloading a complete Breeze Presentation**

Download the complete Breeze Presentation to deploy it intact on an intranet or distribute it on a CD. It is downloaded as a ZIP file, which you then extract on your computer.

**To download a complete Breeze Presentation:**

1. Click the Content tab.
2. Navigate to the presentation that you want to download; for more information, see “Navigating the Content library” on page 35.
3. Click the name of the presentation.
   The Content Information page appears.
4. Click the Download Content link on the navigation bar.
   The Download Content page appears.
5. Click the Download Output File link.
   A browser download dialogue box appears and asks where you want to save this file.
6. In the Save As dialog box, navigate to where you want to save the file.
7. Click Save in the File Download dialog box.
   A download progress bar appears. When the download is complete, you can immediately view or extract the content on your computer. For more information, see “Extracting a ZIP file” on page 50.
Extracting a ZIP file

After you download a Breeze Presentation, unzip it. To unzip the presentation, you need utility software that can unzip ZIP files.

Since each ZIP utility has separate directions for unzipping a file, you can refer to your utility help file for more information. In addition, you must create a new directory for each presentation that you download, since you can only have one Breeze Presentation per directory and unzipping a new presentation to a directory that already contains a presentation overwrites the existing presentation.

- For UNIX or Macintosh computers, you can use a utility such as Unzip.
- For Windows, you can use a utility such as WinZip.

You then unzip the content to a new directory.

Download Breeze Presentation source files

Download the Breeze Presentation source files if you no longer have your source PPT and PPC files.

You must save the PPC file in the same folder in which you saved the PPT file, and you must give it the same name as the PPT file, with the PPC extension, to maintain any audio or timings in the presentation. Thus, you should have both the PPC and PPT files in your folder, with the same name but with different file extensions. It's critical that you do not overwrite the PPT file extension with a PPC extension; if you do, the file may become unusable.

To download the Breeze Presentation source files:
1. Click the Content tab.
2. Navigate to the presentation that you want to download.
   For more information, see “Navigating the Meetings library” on page 145.
3. Select the name of the presentation.
   The Content Information page appears.
4. Click the Download Content link on the navigation bar.
   The Download Content page appears.
5. Click the Download PowerPoint Source File link.
6. Click Save in the File Download dialog box.
7. Navigate to where you want to save the file in the Save As dialog box.
   Caution: Do not change the file extension (PPT), or the file may become unusable. If you change the filename, you must also name the PPC file with the same name.
8. Click Save.
9. Click the Download Audio/Timing Source File link on the Download Content page.
10. Click Save in the File Download dialog box.
11. Navigate to where you want to save the file in the Save As dialog box.
12. Click Save.
   A download progress bar appears.
Changing a content folder name and description

To change a meeting folder name and description, you must be an administrator or a user with permissions to manage the specific content folder in question.

To create a meeting folder:
1. Click the Content tab at the top of the Breeze Manager window.
2. Navigate to the location of the folder whose name and description you want to change; for more information, see “Navigating the Content library” on page 35.
3. Click the folder name to open it.
   The folder name appears in the navigation trail and the list of files in this folder appears.
4. Click the Edit Information link above the content list.
   The Edit Information page appears.
5. Enter the new name for the folder in the Title text input box, and, if desired, a description in the Summary text input box.
6. Click Save.
   The Content List page reappears with the new folder name in the navigation trail.

Setting custom permissions for content files and folders

By default, when you add content to the Content library using any method (see “Adding new content to the Content library” on page 44), the file permissions are set to Same As Parent. The file has the same permissions as that of the folder in which you have saved it.

Folder and file permissions

A content file does not have to keep the same permissions as its parent folder. Administrators and users with permission to manage a specific Content library folder can edit a content file’s permissions profile. To change permissions on a file or folder, you must first open it.

In addition, presentations that you upload using Breeze Presenter may have a different permission setting than the folder you are uploading to. This is because although Same As Parent is the default setting during the publishing process, authors with Manage permissions can customize the file permissions when they are publishing the presentation. For more information, see Breeze Presenter User Guide.

Options for viewing content files and folders

You can make content files public or private, as follows:

Public   Anyone can view a public content file if they have its URL.

Private  Only Breeze users with View, Manage, or Publish permissions can view private content. To do so, they must first log in with a Breeze user name and password.
If you publish or upload a file to a folder that has its permissions set to allow public viewing, the content file is also available for public viewing by default. Similarly, if the parent folder has a custom permissions profile that allows only certain groups to view or manage it, the content file by default has the same profile.

You can customize the permission settings of a content file or folder by using the following options:

- **Allow public viewing**  
  Make the content file or folder available publicly, even if the parent folder permissions are not set to allow public viewing.

- **Set a custom permission profile for users and groups**  
  Add users or groups to the profile and set the access for each to Denied, View, Publish, or Manage. User and group permissions that you set for the file or folder take precedence over the permissions that are set for the parent folder.

- **Reset to parent**  
  Set the content file permissions back to the permissions of the parent folder.

### Setting permissions for content files or folders

If you are an administrator or a user with Manage permission for a specific Content library folder, you can use the following procedure to customize the permissions list for the folder.

**To set permissions for a content file or folder:**

1. Click the Content tab.
2. Navigate to the content file or folder that has permissions you want to set; for more information, see "Navigating the Content library" on page 35.
3. Click the name of the content file or folder to open it. One of two pages appears:
   - If this is a file, the Content Information page appears.
   - If this is a folder, the list of the folder’s contents appears.
4. To set permissions for a file within the folder list, select the check box to the left of the file name and click Set Permissions on the navigation bar. To set permissions for the whole folder, just click Set Permissions. One of the following pages appears:
   - If this file or folder has already been customized, the Set Permissions page appears with the Available Users and Groups list on the left and the Current Permissions list on the right.
     - To modify this list, go to step 6.
     - To reset to the permissions to the parent folder, click Reset To Parent above the Available Users and Groups list.
   - If the file or folder was never customized, the customization page appears with the message “Current Setting: same as parent folder.”
     - To maintain the same setting, click OK to return to the meetings and folders list page.
     - To customize the permissions, proceed to step 5.
5. Click Customization.

The Set Permissions page appears with the Available Users and Groups list on the left and the Current Permissions list on the right.

6. Set or modify permissions for this file or folder as follows:

- Press Control-click or Shift-click, as appropriate, to select multiple users or groups in the Available Users and Groups list.
- To expand a group so that you can select individual members in the Available Users and Groups list, double-click the group name; when you are finished with this group, click Up One Level in the list to return to the parent folder list.
- To search for a name in the list in the Available Users and Groups list, click Search at the bottom of the window, enter the name to display it in the list, then select the name.

7. Click Add.

The users and/or groups you added appear in the Current Permissions list with a default permission setting of View. To remove a user or group from this list, select it and click Remove.

8. Assign permissions for each user and group in the Current Permissions list as follows:

   a. Select a name in the list:
      - Press Control-click or Shift-click, as appropriate, to select multiple users or groups.
      - To search for a name, click Search at the bottom of the window and enter the name to display it in the list, and then select it.
   b. For each selection, click Permissions at the bottom of the window.
      - A pop-up permissions menu appears.
   c. Click the permission setting that is appropriate for each selected name.
      - The permissions for the selected names change to the permissions you assigned.

**Modifying file or folder permissions**

You can change the permissions for a content file or folder by adding or removing users and groups from the list:

- To add a user or group, use the procedure for setting permissions; see “Setting custom permissions for content files and folders” on page 51.
- To remove a user or group, see “Removing a user or group from the permission access list” on page 53.

**Removing a user or group from the permission access list**

Follow this procedure to disable a user’s or group’s access to a content file or folder.

**To remove a user or group from the permission access list:**

1. Click the Content tab at the top of the Breeze Manager window.
2. Navigate to the meeting folder whose permissions you want to set; for more information, see “Navigating the Content library” on page 35.
3. Click the folder name to open it.
4. Click Set Permissions on the navigation bar.
   
One of the following pages appears:
   ■ If this folder has already been customized, the Set Permissions page appears with the
     Available Users and Groups list on the left and the Current Permissions list on the right.
     To delete users or groups, go to step 6.
   ■ If the folder was never customized, the customization page appears with the message
     “Current Setting: same as parent folder.”
     To remove users or groups, go to step 5.
5. Click Customization.
   
The Set Permissions page appears with the Available Users and Group list on the left and the
Current Permissions list on the right.
6. To remove users or groups from the access list, do one of the following in the Current
Permissions list:
   ■ Press Control-click or Shift-click, as appropriate, to select multiple users or groups.
   ■ To search for a name in the list, click Search at the bottom of the window, enter the name to
display it in the list, and then select it.
7. Click Remove
   
The users and/or groups you removed disappear from the Current Permissions list.

**Viewing the Content Dashboard**

The Content Dashboard provides a graphical representation of statistical data about your content. The data reflects all of the content in your My Content folder and appears in four bar graphs:

**Most Viewed Content over the Last 30 Days**  Shows the number of views. Click any item in
the display to view the Content Information page for the item.

**Most Effective Presentations over the Last 30 Days**  Determined by percentage of slides
viewed across all viewers. Click any item in the display to view the Content Information page for
the item.

**Most Recently Viewed Content**  In list format, shows the name, content type, number of
views, and last time this content was viewed. The most recently viewed is listed first. Click any
item in the display to view the Content Information page for the item.

**Aging Content**  In list format, shows the name, content type, and last time this content was
viewed. The most recently viewed is listed last. Click any item in the display to view the Content
Information page for the item.

The bar graphs appear within the Breeze Manager Content tab window. However, you can also
export the Dashboard to a browser window that you can print. To do so, click Printable Version
on the left, above the display.
Content reports

The Reports feature of the Breeze Manager lets you create reports that show you a given piece of content from different perspectives. To use the Reports feature, open the Content Information page (see “Viewing the properties of a content file” on page 37), and click the Reports link above the Content Information title bar. This displays other links that let you define the kinds of report information you can see for this content. The links are as follows:

**Summary** The first report type that appears when you access the Reports feature. The Summary provides the content name, the date that the content was last modified, and the number of times this content was viewed.

**By Slides** Applies to presentations only. A bar graph lists each slide in the presentation by slide number and the number times it was viewed; below the graph is a table with the same information, which also includes the last time each slide was viewed.

**By Questions** A bar chart shows each question, color-coded as correct or incorrect, and the number of respondents for the question. Click on a specific question in the bar to display a pie chart with a table that provides the answer key and answer distribution. The answer key lists all possible answers for the selected question and their corresponding answer number or letter. The answer distribution lists all of the answer choices selected for this question, flags the correct answer, and shows the number of users who selected each answer, as well what percent of the total each number of users represents. Finally, the chart totals the users by number of users and percent of users. Below the graph is a table that provides an overview of all questions, listing each question by number, name, number of correct answers, number of incorrect answers, percentage of correct, percentage of incorrect, as well as the score.

**By Answers** A table provides the maximum possible score, the passing score, the average score, and the high score for the quiz. For each question, the table also shows the question number, the question itself, and the answer distribution; that is, how each question was answered, if at all. Click on the view answers link to display a pie chart with a table that provides the answer key and answer distribution. The answer key lists all of the possible answers for the selected question and their corresponding answer number or letter. The answer distribution lists all of the answer choices selected for this question, flags the correct answer, and shows the number of users who selected each answer, as well what percent of the total each number of users represents. Finally, the chart totals the users by number of users and percent of users.

*Note:* Breeze resets content scores for quizzes and surveys each time the user accesses the content. This means that if a user closes out of the content without completing the quiz or survey, then returns to it later, all of the previous answers are lost. If you do not want the score to reset, and you have access to the Training tab, you can create a new course and select the content in question as the course content. This way, you have turned the content into a course. For details about how to create a new course, see "Creating a new course" on page 66.

The Hide Answer Distribution/Show Answer Distribution button is a toggle that lets you hide the distribution of answers for each question, then show them again.
Setting and removing report filters

Where appropriate, you can further define the information you see on a particular report by specifying report filters. For content files, these filters are operable for all of the four report types. For a description of report filters and procedures for setting and removing them, see “Setting and removing report filters” on page 25.

Downloading reports

With the exception of the Summary report, you can export all content reports to comma separated values (CSV) file by clicking Download Report Data under the report types links. For information about how to download reports, see “Downloading reports” on page 28.
**Note:** This chapter applies only to accounts that include the Macromedia Breeze Training application.

The Macromedia Breeze Training application consists of two components: courses and curriculums.

A *course* is a Macromedia Breeze Presentation that is associated with a given set of enrolled learners with usage tracking for each individual. The presentation can be delivered and administered independently or as part of a curriculum.

A *curriculum* is a group of courses and other learning content that moves students along a particular learning path. A curriculum can include Breeze content, presentations that are not constructed as courses, meetings, seminars, and courses, as well as learning content external to Breeze, such as classroom training and required reading. As is the case with courses, you can generate reports to track the progress of the enrollees as they move through the curriculum, to ensure that it meets the learning objectives.

All Breeze courses and curriculums are contained and organized in a directory of folders called the Training library.

**Accessing the Training library**

You access the Training library by clicking the Training tab at the top of the Breeze Manager window. As you navigate the library, the names of the folders appear as a navigation trail at the top of the browser window.

To create courses and curriculums, you must be a training manager. To manage a Training library folder, you need not be a training manager, but you must have Manage permissions for this folder in the Training library.

For a list of activities that you can perform in the Training library with the appropriate permissions, see “Training tasks” on page 60.
About Training library permissions

Consider the following aspects of permissions when you work with the Training library:

**Attendance role permissions** define the roles that learners play in a given course or curriculum. The two attendance role permissions are Enrolled and Denied. Individuals with an Enrolled permission can view a course or curriculum; individuals with a Denied permission cannot access the course or curriculum.

Attendance role permissions are assigned when a course or curriculum is created; for more information, see “Creating a new course” on page 66 or “Creating a curriculum” on page 83, as appropriate. Permissions can also be changed after the course or curriculum is created. To change permissions, the training manager must open the course or curriculum file and edit the participant list to add or remove enrollees. The training manager must also have Manage permissions for the folder where this course or curriculum is located.

**Training library management permissions** define who can perform the different tasks associated with the Training library files and folders, such as adding and deleting files, searching the library archives, and so on. The ability to create, delete, and edit courses and curriculums in various folders in the Training library is determined by the groups that a user belongs to and the individual permissions that are assigned to a user for specific files and folders. The Training library has only two permissions: Manage and Denied.

Members of the Administrator group can manage all files and folders in the Training library. By default, training managers have Manage permissions only for their individual folder in the User Training folder. This means that training managers can add, delete, change, or assign permissions only for their own folders. All other Manage permissions are assigned on an individual or group basis by the administrator.

**Training library permissions for Built-in groups**

Breeze recognizes six default permission groups called *Built-in groups*. You cannot change the permissions for these groups, but you can extend them by assigning individuals or groups to more than one Built-in group.

The Training Managers group is associated with the Training library, which means that each training manager has an individual folder in the User Training folder within the Training library, in which they can create and administer their courses and curriculums. The Breeze administrator can also assign Manage permissions for specific Training library folders to users who are not training managers. Only training managers can create new courses or curriculums, however.

For more information about how permissions are configured for a user who belongs to multiple groups and has multiple permissions, see “Multiple permissions precedence” on page 269.
Course and curriculum registration

Depending on the type and purpose of a given course or curriculum, the training manager might want to have the guests register. If so, the manager must have the Event Management tab as part of the Breeze Manager application, since registration for any training can only be done through the Event Management tab. A training manager who has this tab must first use the Course or Curriculum wizard to create the course or curriculum from the Training tab (see Chapter 5, “Working with Courses,” on page 63 or Chapter 6, “Working with Training Curriculums,” on page 81), but skip the select participant and send invitations steps. Next, the training manager creates an event by using the Present a Breeze Training Course or Curriculum option in the Event wizard, and selects the meeting that was created as the event.

The Event wizard lets the training manager select and invite enrollees, select and customize registration questions, and send invitations, even to large e-mail lists. For information about events, see Chapter 14, “About Events,” on page 195 and Chapter 15, “Working with Events,” on page 201.

If the training is presented as an event, all enrollees, regardless of whether they have a Breeze account or whether the URL is public, must provide registration information before the training. In this case, the training manager can review the registration applications before the training and approve or deny admittance to each registrant.

AICC content for courses

When you use Aviation Industry CBT Committee (AICC) content in courses, Breeze applies some specific rules. For information, see “Guidelines for using AICC content” on page 30.

Viewing the Training Dashboard

The Training Dashboard contains two bar graphs, one for courses and one for curriculums:

- **Course Summary Over the Last 30 Days**  Shows the courses over the last 30 days with the greatest number of enrollees who have passed this course; click on any bar to see more detail.

- **Curriculum Summary Over the Last 30 Days**  Shows the courses over the last 30 days with the greatest number of enrollees who have completed this curriculum; click on any bar to see more detail.

The bar graphs appear within the Breeze Manager Content tab window. However, you can also export the Dashboard to a browser window that you can print. To do this, click Printable Version on the left, above the display.
Training tasks

In addition to the information in this chapter, you can find all of the information about any Breeze Training task you can perform using Breeze Manager in the following chapters of this guide:

- This chapter, Chapter 4, “About Training,” provides background information relevant to the Training application.
- Chapter 5, “Working with Courses,” provides procedures about how to create and change individual courses. It does not address the file management functions of the Training library.
- Chapter 6, “Working with Training Curriculums,” provides information and procedures for creating and changing individual curriculums, including assigning prerequisites and completion requirements.
- Chapter 7, “Managing the Training Library,” provides procedures about the administrative tasks associated with the library and deals specifically with file management, such as instructions about how to add, move, and delete folders.

The following table lists all of the tasks you can perform by using Breeze Training and directs you to the appropriate topic in this guide.

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CHAPTER 5
Working with Courses

Note: This chapter applies only to accounts that include the Macromedia Breeze Training application.

A course is a Macromedia Breeze Presentation that is associated with a given set of enrolled learners and with usage tracking of each individual enrollee. As such, a course might consist of a stand-alone presentation, or it might be offered as part of a curriculum (see Chapter 4, “About Training,” on page 57).

All Breeze courses are contained, organized, and manipulated in a directory of folders called the Training library. This chapter does not discuss library management activities. For this information, see Chapter 7, “Managing the Training Library,” on page 109. Instead, this chapter addresses all tasks involved in creating and administering courses that you can do in Breeze Manager. This includes modifying any aspect of a course, such as course description and times, content, enrollees, notifications, and reminders.

The following table describes the topics in this chapter and provides links to access them.

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Viewing course information

You can view or change information about a course from within Breeze Manager. The starting point for any of this information is the Course Information page, the page that appears when you click the course name in the Training folder list. From this page, you can view or edit the information for a specific course, including the course summary, content, enrollees, and settings for notifications and reminders. Each of these features is accessible as a navigation link when you access the Course Information page.

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Viewing course information

You can view or change information about a course from within Breeze Manager. The starting point for any of this information is the Course Information page, the page that appears when you click the course name in the Training folder list. From this page, you can view or edit the information for a specific course, including the course summary, content, enrollees, and settings for notifications and reminders. Each of these features is accessible as a navigation link when you access the Course Information page.
Viewing the course information

Every course has a Course Information page, which is a summary that contains the information displayed in the following illustration.

Course Information  The course name, ID, summary, open date, close date, course URL, number of slides, duration, maximum attempts (the maximum number of times an enrollee can take this course), and language.

Reminder Policy  A field that indicates whether a reminder policy is enabled, to whom reminders are being sent, the date that the next reminder will be sent, and how often reminders are sent.

To view a course summary:

1. Click the Training tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the course for which you want to get information.
   - For more information, see “Navigating the Training library” on page 111.
3. In the course list, click the name of the course to select it.
   - The Course Information page appears.
Viewing the enrollee list

You can view a list of all enrollees for each course who are registered Breeze users.

To view a course enrollee list:
1. Click the Training tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the course for which you want to get information; for more information, see “Navigating the Training library” on page 111.
3. In the course list, click the name of the course to select it.
   The Course Information page appears.
4. Click the Manage Enrollees link in the navigation bar.
   A page appears with the Available Users and Groups list on the left, and the Current Enrollees for this course on the right with the names of enrolled users and groups. To edit this list, see “Changing course enrollees” on page 76.

Creating a new course

Before you create a course, make sure that the following are true:
• The content that you want to use for the course exists in the Content library.
• You have View or Manage permissions for the file in the Content library that you want to use as your content. For more information, see “Structure of the Content library” on page 32, “Adding new content to the Content library” on page 44, and Breeze Presenter User Guide.

Custom URLs

When you create a new course, you can include a custom URL. This URL is unique across the entire Breeze account, and is meaningful for your course. For information about how to use custom URLs, including restricted terms and usage rules, see “Custom URLs” on page 24.

Starting the Course wizard

You can use the Course wizard to create a new course, as described in the following procedure.

To start the Course wizard:
1. Do either of the following:
   ■ To start from the Home tab, click New Course under Create. Proceed to step 4.
   ■ To start from the Training tab, click the Training tab and proceed to step 2.
2. Navigate to the folder where you want to add a new course; for more information, see “Navigating the Training library” on page 111.
3. Click New Course in the navigation bar.
   The Enter Course Information page appears; if you launched the wizard from the Home tab, the new course is in your My Training folder.
4. Follow the steps in the Course wizard, beginning with “Entering course information” on page 67.
Entering course information

The first step in the Course wizard is to enter the following background details about the course. You can edit this information any time after the course is created. For more information, see “Editing course profile information” on page 74.

Course Name  The name of the course; a required field that appears in the course list and in reports.

Course ID   The course number or ID: for example, 100, CS100, and so on.

Custom URL  An optional field that lets you recreate a personalized URL for this course that is reusable and easy to remember. If you do not enter one, the system automatically generates a URL for you. For information you need to know before entering a custom URL, see “Custom URLs” on page 24.

Summary  A course description that appears on the Course Information page. A course summary can be up to 750 characters long.

Course Starts On  The course start date. A required field for setting a date before which users cannot access the course.

Course Closes On  The course end date. An optional field for setting a date after which users cannot access the course.

Max Attempts  The maximum number of times an enrollee can take this course (for example, if the enrollee fails repeatedly). If you don't enter a value, the number is unlimited.

To enter course information:

1. On the Enter Course Information page, enter values for the following fields: Course Name (required), Course ID (optional), Custom URL (optional), and Summary (optional).
2. Select the month, day, year, and time for the Course Starts On date.
3. Set the Course Closes On value by doing either of the following:
   ■ Select the No Close Date option.
   ■ Select the month, day, year, and time.
4. Enter the number of maximum attempts an enrollee can take this course; leave this field blank to allow unlimited retries.
5. Click Next.
   The Select Content page appears.
6. Proceed to “Selecting course content”.

Creating a new course  67
Selecting course content

The second step in the Course wizard is to select the course content. In this step, Breeze directs you to the Content library, where you navigate to the content file you want to use. This must be a file for which you have either View or Manage permissions. In addition, you can select only one item from the library.

For more information on the structure of the Content library, see “Structure of the Content library” on page 32.

When you select the content to use in a course, Breeze makes a copy of it and this copy is used for the course. This means that any changes made to the original content that you select do not affect the course. You can also change the content used for a course any time after the course is created. For more information, see “Changing course content” on page 75.

To select course content:
1. On the Select Content page, navigate to the folder that contains the item you want to use; for more information, see “Navigating the Content library” on page 35.
2. Select the option that you want to use for the course.
3. Do one of the following:
   ■ Click Next to enroll learners now.
      The Enroll Learners page appears with the Available Users and Groups list on the left and the Current Enrollees list on the right. (See the next section.)
   ■ Click Finish
      The Course Information page appears. This ends the Course wizard without permitting you to enroll learners or set up course notifications and reminders.

To enroll learners, set up course notifications, or enable e-mail reminders later, you can edit the course. See “Changing course enrollees” on page 76, “Changing settings for course notifications” on page 77, or “Changing settings for course reminders” on page 78.

Enrolling learners

The third step in the Course wizard is to select the course enrollees. You can enroll users or groups of users. Only the users you add to this list can browse to the course URL and log in to view the course. To enroll large numbers of users, if you have the Event Management application, present the course as an event. For details, see “Course and curriculum registration” on page 59.

You can also change the learners enrolled in a course any time after the course is created. For more information, see “Changing course enrollees” on page 76.
To enroll learners:

1. In the Available Users and Groups list, select each user and/or group that you want to invite to this course by doing one of the following:
   - Press Control-click or Shift-click to select multiple users or groups.
   - To expand a group to select any individual members, double-click the group name; when you are done with selection, click Up One Level in the list to restore the original list.
   - To search for a name in the list, click Search at the bottom of the window and enter the name to display it in the list, and then select it. Click Clear to return to the list.

2. Click Add.
   The users and/or groups you added appear in the Current Enrollees list with a default permission of Enrolled. To remove a name from this list, select it and click Remove.

3. Do either of the following:
   - Click Next to send notifications.
     The Set Up Notification page appears. (See the next section.)
   - Click Finish.
     This ends the Course wizard without permitting you to set up course notifications or reminders.

To set up course notifications or enable e-mail reminders later, edit the course. See “Changing settings for course notifications” on page 77 or “Changing settings for course reminders” on page 78.

Setting up notifications

The fourth step in the Course wizard is setting up course notifications. A course notification is an e-mail notification sent to either all or designated course enrollees, informing them that they are enrolled in the course and telling them how to access it. When you set up a course e-mail notification, you select whether to send an e-mail notification, and if so, you set the notification timing (when the e-mail notification is sent to enrollees) and the e-mail subject and message.

When you format your notification, you can use run time fields in the subject line and in the body of the message. These fields are course information variables that are automatically filled in for you when the e-mail notification is sent. For more information on run time fields, see “Notification e-mail settings” on page 70 and “Default notification e-mail fields” on page 71.

You can also change the course notifications any time after the course is created. For more information, see ”Changing settings for course notifications” on page 77.

To set up course notifications:

1. On the Set Up Notification page, select the option for the notification timing you want.
2. Select the option for the recipients whom you want to receive the notifications.
3. Edit the e-mail subject and message; to use run time fields, select and copy the field name from the Run Time Fields list to the right of the message body and paste it into the message subject or body. Do not change any of the run time field text in braces.
4. Do either of the following:
   ■ Click Next to set up course reminders.
      The Set Up Reminders page appears. Proceed to “Setting up reminders” on page 71.
   ■ Click Finish.
      This ends the Course wizard without setting up reminders.
   To set up reminders later, edit the course. See “Changing settings for course reminders” on page 78.

Notification e-mail settings

The following are the settings for notification timing and valid run time fields:

Notification Timing  Setting for when the e-mail notification is sent to enrollees. The following are the possible values:
   • Do not send a notification.
   • Send notification now.
   • Send notification on course start date (the default value).
   • Send on (a specific month, day, and year that you select from a pop-up menu).

Recipients  Setting for which recipients receive notifications. The following are the possible values:
   • All enrollees (the default value)
   • Enrollees who have not completed the course
   • Enrollees who have failed the course
   • Enrollees who have failed or not completed the course
   • Only to specific e-mail addresses (you can enter the specific e-mail addresses in a text box, with each user separated by a comma)

Message  Modifiable text for the message subject and body. You can customize these, and you can select from run time fields, which are values that Breeze automatically provides.

Run time fields  Course information variables that you can use in your e-mail notification that are automatically filled in for you when the e-mail notification is sent. The following are the run time fields, shown in braces because they are variables:

{name}  The current name of the course
{course-id}  The current course ID
{description}  The current course summary
{start-date}  The current course start date, displayed in the format Saturday 12 July
{end-date}  The current course close date, displayed in the format Saturday 12 July

Do not change a run time field; if you do, it will not be replaced.
Default notification e-mail fields

You can use or change the following default e-mail subject and message text:

**Default subject**  You are enrolled in: {name}

**Default message**  The default e-mail message is as follows:

You are enrolled in the following course that you are required to complete.

Course: {name} (or {course-id})

To access the course go to the following URL:

*The course URL is shown here.*

Note: If the preceding URL is a hyperlink, click it to access the course. Otherwise, cut and paste the URL into your browser address box.

Notification e-mail timing

Notifications are placed in a queue and are sent as follows:

- Notifications set to *send now* are sent shortly after the course is created.
- Notifications set up for future dates are processed every night at midnight. On the set date, depending on the number of notifications in the queue, they are sent within a few minutes or a few hours after midnight PST.

Notifications appear to be sent from whoever creates the course, using the e-mail address specified in their Breeze account. Any e-mail delivery failure notifications are sent to that address.

All e-mail notifications are sent individually. Recipients do not see the list of other recipients in the message header.

Setting up reminders

The fifth step in the Course wizard is setting up course reminders. Reminders are optional—the Course wizard lets you disable course reminders if you do not want to use them.

A course reminder is an e-mail reminder sent to either all or selected course enrollees after you set up the course. You can use reminders for the following purposes:

- To remind the current enrollees that they are scheduled to take the course as the course date approaches
- To notify specific individuals that they are required to complete this course
- To notify specific individuals who have failed this course that they are required to take it again to pass

You can use the same run time field variables you used for notifications. For more information, see “E-mail reminder settings” on page 72 and “Default e-mail reminder fields” on page 73.

You can also change the course reminders any time after the course is created. For more information, see “Changing settings for course reminders” on page 78.
To set up course reminders:
1. On the Set Up Reminders page, select the option for the reminder notification timing that you want, including the starting date and recurrence frequency.
2. Select the option for the recipients to whom you want to send the reminder; for more information, see “E-mail reminder settings” on page 72.
3. Edit the e-mail subject and message; to use run time fields, select and copy the field name from the Run Time Fields list to the right of the message body and paste it into the message subject or body. Do not change any of the run time field text in braces.
4. Click Finish.

This ends the course creation process. The Course Information page appears.

E-mail reminder settings

The following are the settings for e-mail reminders and valid run time fields:

**Notification Timing** Setting for specifying whether to send reminders, and if so, when e-mail reminders are sent to enrollees. You set the reminder start date and specify whether the reminders are sent once, daily, weekly, or monthly.

**Recipients** Setting for which recipients receive reminders. The following are the possible values:
- All enrollees (the default value)
- Enrollees who have not completed the course
- Enrollees who have failed the course
- Enrollees who have failed or not completed the course
- Only to specific e-mail addresses (you can enter the specific e-mail addresses in a text box, with each user separated by a comma)

**Run time fields** Course information variables that you can use in your e-mail and that are automatically filled in for you when the e-mail reminder is sent. The following are the run time fields, shown in braces because they are variables:

- `{name}` The current name of the course
- `{course-id}` The current course ID
- `{description}` The current course summary
- `{start-date}` The current course start date, displayed in the format Saturday 12 July
- `{end-date}` The current course close date, displayed in the format Saturday 12 July

Do not change any of the text within the braces in a run time field; if you do, it will not be replaced.
Default e-mail reminder fields
You can use or change the following default e-mail subject and message fields:

**Default subject**  You are enrolled in: {name}

**Default message**  The default e-mail message is as follows:
You are enrolled in the following course that you are required to complete.
Course: {name} (or {course-id})
To access the course go to this URL:
*The course URL is shown here.*
Note: If the preceding URL is a hyperlink, click it to access the course. Otherwise, cut and paste the URL into your browser address box.

E-mail reminder properties
Reminders are placed in a queue and are sent as follows:

- Reminders set to be sent *starting on the current date* are sent shortly after the course is created.
- Reminders set up for future dates are processed every night at midnight. On the set date, depending on the number of e-mail reminders in the queue, they are sent within a few minutes or a few hours after midnight PST.

Reminders appear to be sent from whoever creates the course, using the e-mail address specified in their Breeze account. Any e-mail delivery failure notifications are sent to that address.
All e-mail reminders are sent individually. Recipients do not see the list of other recipients in the message header.

Managing courses
If you are an administrator or a user with permission to manage a specific Training library folder, you can manage courses by performing the following tasks:

- “Deleting a course” on page 73
- “Editing course profile information” on page 74
- “Changing course content” on page 75
- “Changing course enrollees” on page 76
- “Changing settings for course notifications” on page 77
- “Changing settings for course reminders” on page 78

Deleting a course
Before you delete a course, be aware of the effect of this action:

- The course is removed from the Training library.
- Enrollees can no longer access the course.
- Reports for the course are no longer available.
• No more course reminders are sent.
• Any delayed course notifications are not sent.
• The content used by the course remains in the Content library.

If you want to prevent access to a course but retain reporting information, set the course close date and do not delete the course.

To delete a course:
1. Click the Training tab at the top of the Breeze Manager window.
2. Navigate to the course that you want to delete.
3. Select the check box located to the left of the course that you want to delete.
4. Click Delete in the menu bar above the course listing.
   The delete confirmation page appears.
5. On the delete confirmation page, click Delete to permanently delete the selected items.
   The folder list reappears without the deleted course.

Editing course profile information

You can edit the profile information for a course. The profile information includes the course name, ID, summary, start date, and close date.

If you change the course start date to a later date, no users (not even those who may have already accessed the course) are able to access the course until the new course start date. If some enrollees have already accessed the course, their tracking and quiz information is retained in reports.

In addition, changing the course title or course summary does not change the information presented on a presentation summary slide. The title and summary used on the initial course summary slide uses the information specified at the time the presentation was originally published. To change this information, you must republish the content, and then reselect the content that the course uses. You can change the following information:

Course name  The name of the course. A required field that appears in the course list and in reports.
Course ID    The course number or ID: for example, 100, CS100, and so on.
Course summary  A course description that appears on the Course Information page. A course summary can be up to 750 characters long.
Course start date  A required field for setting a date before which users cannot access the course.
Course close date  An optional field for setting a date after which users cannot access the course.
Max attempts  The maximum number of times a user can take this course; if you leave this blank, you are allowing an unlimited number of retries.
To edit course information:
1. Click the Training tab at the top of the Breeze Manager window.
2. Navigate to the course whose information you want to edit.
   For more information, see “Navigating the Training library” on page 111.
3. In the course list, click the name of the course to select it.
   The Course Information page appears.
4. Click the Edit Information link in the navigation list.
   The Edit Information page appears.
5. Edit the Course information.
6. Click Save.
   The Course Information page appears.

Changing course content

When you create a new course, you select the content to be used in the course from the Content library (see “Selecting course content” on page 68). A copy of the content is made, and this copy is used for the course. This means that changes made to the original content do not affect the course.

Do not change course content if the current course content has a quiz that users have already taken. If you do, you may have problems resulting from grading inconsistency, such as the following:

- Quiz scoring becomes inconsistent.
- Reports might not provide an accurate representation of pass or fail status for users who took the course before quiz changes occurred.

If you want to update a course quiz (including changing the passing score, adding or removing questions, changing answers, changing question scoring, reordering questions, changing quiz options such as forward and backward progress, or adding information to a course that may increase or reduce the difficulty of a quiz question) and still ensure that reports and grades are consistent, create a new course that uses the updated content.

To change course content:
1. Click the Training tab at the top of the Breeze Manager window.
2. Navigate to the course whose content you want to change; for more information, see “Navigating the Training library” on page 111.
3. In the course list, click the name of the course to select it.
   The Course Information page appears.
4. Click the Select Content link in the navigation bar.
   The Select Content page appears; you are now in the Content library.
5. Navigate to the folder that contains the content that you want to use for the course; for more information, see “Navigating the Content library” on page 35.
6. Select the button next to the content that you want to use for the course.
7. Click Save.
   A warning page appears, informing you of the consequences of changing the course's content.
8. If you still want to change the content, click Yes, Update My Content.
   The Course Information page reappears.

Changing course enrollees

If you add enrollees to a course, you must notify the new learners. For instructions, see “Changing settings for course notifications” on page 77. You might also want to set up reminders for them; for information, see “Changing settings for course reminders” on page 78.

Enrollees who are removed from enrollment do not receive any notification; they are simply no longer able to access the course.

To add course enrollees:

1. Click the Training tab at the top of the Breeze Manager window.
   For more information, see “Navigating the Training library” on page 111.
2. Navigate to the course to which you are adding enrollees.
3. In the list, click the name of the course to select it.
   The Course Information page appears.
4. Click the Manage Enrollees link in the navigation bar.
   The Manage Enrollees page appears with the Available Users and Groups list on the left and the Current Enrollees list on the right.
5. Do one of the following to select enrollees in the Available Users and Groups list:
   - Press Control-click or Shift-click to select multiple users or groups.
   - To expand a group so you can select individual members, double-click the group name; when you are done with this group, double-click Up One Level in the list to return to the parent folder list.
   - To search for a name in the list, click Search at the bottom of the window and enter the name to display it in the list, and then select it.
6. Click Add.
   The users and/or groups you added appear in the Current Enrollees list; to remove a name from this list, select it and click Remove.

To remove course enrollees:

1. Click the Training tab at the top of the Breeze Manager window.
2. Navigate to the course whose content you want to change.
   For more information, see “Navigating the Training library” on page 111.
3. In the course list, click the name of the course to select it.
   The Course Information page appears.
4. Click the Manage Enrollees link in the navigation bar.

   The Manage Enrollees page appears with the Available Users and Group list on the left and the Current Enrollees list on the right.

5. To select users or groups to be removed, do one of the following in the Current Enrollees list:
   - Press Control-click or Shift-click to select multiple users or groups.
   - To search for a name in the list, click Search at the bottom of the window, enter the name to display it in the list, and then select the name.

6. Click Remove.

   The users and/or groups you removed disappear from the Current Enrollees list.

Changing settings for course notifications

If a course notification was already sent (for example, you had a notification sent when the course was created or on the day the course started and that date has already passed), you can select a later date to have another e-mail notification sent. If a scheduled course notification was not yet sent, you can change the date when it will be sent.

When you change a course e-mail notification, you can reset the notification timing (when the e-mail notification is sent to enrollees), the recipients of the e-mail notification (all enrollees, those who have not yet taken the course, those who failed the course, those who have failed or not completed the course, or custom recipients), and the e-mail subject and message. For example, if you added just a small number of new enrollees, you can specify their e-mail addresses individually. You can also use run time fields in the subject line and in the body of the message.

To change settings for a course notification:
1. Click the Training tab at the top of the Breeze Manager window.
2. Navigate to the course whose notification settings you want to change; for more information, see “Navigating the Training library” on page 111.
3. In the course list, click the name of the course to select it.
   The Course Information page appears.
4. Click the Notifications link in the navigation bar.
5. On the Notifications page, click the button for the notification timing you want and reset the Send On date, if necessary.
   For more information, see “Notification e-mail settings” on page 70.
6. Click the option that identifies the group of recipients to which you want to send the notification; for more information, see “Notification e-mail settings” on page 70.
7. (Optional) Edit the e-mail subject and message, using any of the run time fields; to use run time fields, select and copy the field name from the Run Time Field list to the right of the message body and paste it into the message subject or body. Do not alter any text in braces in a run time field.

For more information, see “Notification e-mail settings” on page 70 and “Default notification e-mail fields” on page 71.

8. Click Send.

The Course Information page appears.

Changing settings for course reminders

When changing course reminder e-mail settings, you can reset the reminder timing (when the e-mail reminder is sent to enrollees and how often), the reminder recipients (all enrollees, those who have not yet taken the course, those who failed the course, those who have failed or not completed the course, or custom recipients), and the e-mail subject and message. You can also use run time fields in the subject line and in the body of the message.

To change settings for course reminders:
1. Click the Training tab at the top of the Breeze Manager window.

2. Navigate to the course whose reminder settings you want to change; for more information, see “Navigating the Training library” on page 111.

3. In the course list, click the name of the course to select it.

   The Course Information page appears.

4. Click the Reminders link in the navigation bar.

   The Reminders page appears.

5. On the Reminders page, click the option for the notification timing you want; change the starting date or recurrence period, as necessary; for more information, see “E-mail reminder settings” on page 72.

6. Click the option that identifies the group of recipients to which you want to send the reminder; for more information, see “E-mail reminder settings” on page 72.

7. (Optional.) Edit the e-mail subject and message, using any of the run time fields; to use run time fields, select and copy the field name from the Run Time Fields list to the right of the message body and paste it into the message subject or body. Do not alter any text in braces in a run time field. For more information, see “E-mail reminder settings” on page 72 and “Default notification e-mail fields” on page 71.

8. Click Save.

   The Course Information page appears.
Course reports

The Reports feature of the Breeze Manager lets you create reports that show you a given course from different perspectives. To use this feature, access the Course Information page (see “Viewing the course information” on page 65), and then click the Reports link above the Course Information title bar. This displays other links that let you define the kinds of report information you can see for this course. The links are as follows:

**Summary**  The first report type that appears when you access the Reports feature. The Summary shows you the course name, the date it was last modified, and the number of times this content was viewed.

**By Slides**  This link shows a bar graph that lists each slide in the course by slide number and how many times it has been viewed; below this is a table with the same information, which also includes the last time each slide was viewed.

**By Users**  This report shows all of the users who have taken this course and for each shows the user’s name, status (Passed, Failed, or Incomplete), score, date completed (the date of the user’s first attempt at the course), time the user took the course (the time of the user’s first attempt at the course), how many times the user took the course, and the certificate number, if applicable. Click on the name of an individual user to view a bar graph and a table that shows each question and whether the user answered it correctly or incorrectly, as well as the score for this question. You can also click the View Answers link for each question, which displays the answer distribution for this question.

**By Questions**  This link shows a table with an overview of all questions, listing each question by number, name, number of correct answers, number of incorrect answers, percentage of correct, percentage of incorrect, as well as the score. Above this is a bar chart that shows each answer, color-coded as correct or incorrect. Click on a specific question in the bar to view a pie chart with a table that provides the answer key and answer distribution. The answer key lists all possible answers for the selected question and their corresponding answer number or letter; the answer distribution lists all of the answer choices selected for this question, flags the correct answer, and shows the number of users who selected each answer, as well what percent of the total each number of users represents. Finally, it totals the users by number of users and percent of users.

**By Answers**  This link shows a table that shows the maximum possible score, the passing score, the average score, the high score, and the low score for the quiz. For each question, the table also shows the question number, the question itself, and the answer distribution; that is, how each question was answered, if at all. Click on the view answers link to view a pie chart with a table that provides the answer key and answer distribution. The answer key lists all of the possible answers for the selected question and their corresponding answer number or letter; the answer distribution lists all of the answer choices selected for this question, flags the correct answer, and shows the number of users who selected each answer, as well as what percent of the total each number of users represents. Finally, it totals the users by number of users and percent of users.

**Note:** Breeze resets content scores for quizzes and surveys each time the user accesses the content. If you do not want the score to reset, and you have access to the Training tab, you can create a new course and select the content in question as the course content. This way, you have turned the content into a course. For details about how to create a new course, see “Creating a new course” on page 66.
The Hide Answer Distribution/Show Answer Distribution button is a toggle that lets you hide the distribution of answers for each question, then show them again.

**Setting and removing report filters**

Where appropriate, you can further define the information you see on a particular report by specifying report filters. For courses, these filters are operable for all of the four report types. For a description of report filters and procedures for setting and removing them, see “Setting and removing report filters” on page 25.

**Downloading reports**

With the exception of the Summary report, you can export all course reports to a comma separated values (CSV) file by clicking Download Report Data under the report types links. For information about how to download reports, see “Downloading reports” on page 28.

You can also export the By Slides or By Questions report to a browser window by clicking Printable Version on the left, above the display.
CHAPTER 6
Working with Training Curriculums

Note: This chapter applies only to accounts that include the Training application.

If you have Training Manager permission, you can use Breeze Manager to group courses and other learning content into a curriculum, which guides users through a prescribed learning path. (For more information about Training Manager permission, see “Training managers” on page 261.)

A curriculum can include Breeze content, presentations, meetings, and courses, as well as learning content external to Breeze, such as classroom training and required reading. You can define prerequisites for a curriculum, as well as design your program so that users can test-out of certain curriculum items, such as courses and content, by passing a related topic.

As users complete items in the curriculum, you can track their progress and generate reports, to ensure that the curriculum meets the learning objectives.

You can use the key features of Breeze curriculums to perform the following tasks:

• Group items, such as courses and presentations, to support user navigation.
• Define prerequisites and “test-outs” for items, which allows enrollees to bypass taking certain items if they pass a test-out item.
• Specify items as required to successfully complete the curriculum.
• Enroll users based on specific criteria, such as work group.
• Send e-mail notifications and reminders to users regarding the curriculum.
• Generate reports that include curriculum statistics.
• View a visual representation of report data using the Training Dashboard.
About curriculum tasks

The following table lists key tasks that you can complete when you create a new curriculum with the New Curriculum wizard, with links to related procedures:

<table>
<thead>
<tr>
<th>Task</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browse to a location in which to save your new curriculum</td>
<td>“Browsing to a curriculum location” on page 84</td>
</tr>
<tr>
<td>Add details about a new curriculum</td>
<td>“Entering curriculum information for a new curriculum” on page 85</td>
</tr>
<tr>
<td>Add items, such as courses, to a new curriculum</td>
<td>“Adding items to a new curriculum” on page 86</td>
</tr>
<tr>
<td>Change the order of items in a new curriculum</td>
<td>“Changing the order of items within a new curriculum” on page 89</td>
</tr>
<tr>
<td>Delete items from a new curriculum</td>
<td>“Removing items from a new curriculum” on page 89</td>
</tr>
<tr>
<td>Exit from the New Curriculum wizard</td>
<td>“Exiting from the New Curriculum wizard” on page 90</td>
</tr>
</tbody>
</table>

After you create a curriculum, you no longer work with the New Curriculum wizard. You can modify your curriculum and complete the tasks listed in the following table, independent of the New Curriculum wizard:

<table>
<thead>
<tr>
<th>Task</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>View information about a curriculum</td>
<td>“Viewing and modifying curriculum information” on page 90</td>
</tr>
<tr>
<td>Edit curriculum information</td>
<td>“Editing curriculum information” on page 96</td>
</tr>
<tr>
<td>Change the order of items in an existing curriculum</td>
<td>“Changing the order of items in a curriculum” on page 91</td>
</tr>
<tr>
<td>Add items to an existing curriculum</td>
<td>“Adding items to a curriculum” on page 91</td>
</tr>
<tr>
<td>Group items within a folder</td>
<td>“Adding a folder to group items in a curriculum” on page 92</td>
</tr>
<tr>
<td>Assign prerequisites to an item</td>
<td>“Assigning prerequisites to an item” on page 94</td>
</tr>
<tr>
<td>Specify that users can skip an item if they pass another item</td>
<td>“Assigning test-outs for an item or folder” on page 95</td>
</tr>
<tr>
<td>Specify completion requirements, which determine whether the user must complete the item to successfully complete the curriculum</td>
<td>“Specifying or editing completion requirements” on page 97</td>
</tr>
<tr>
<td>Send an e-mail reminder to curriculum enrollees</td>
<td>“Sending reminders to curriculum enrollees” on page 100</td>
</tr>
<tr>
<td>Send an e-mail notification about the curriculum to enrollees</td>
<td>“Sending notification to curriculum enrollees” on page 99</td>
</tr>
</tbody>
</table>
Creating a curriculum

The New Curriculum wizard simplifies the process of creating a curriculum. The following procedures outline the typical workflow for creating a curriculum:

- “Browsing to a curriculum location” on page 84
- “Entering curriculum information for a new curriculum” on page 85
- “Adding items to a new curriculum” on page 86

After you create a curriculum, you can complete additional tasks, such as adding external training, adding enrollees, and sending reminders.

Sample curriculum, containing external training item, three meetings, SWF file, course, and folder
Browsing to a curriculum location

You can create or browse to a folder in the Training library that will contain the curriculum (you must have permission to access the folder). When you determine a location, you open the New Curriculum wizard to create your curriculum in the selected location.

**Note:** If you want to save your curriculum in your User Training folder, you can bypass this procedure by simply clicking the New Curriculum link on the Breeze Manager Home page and following the steps to enter curriculum information. See “Entering curriculum information for a new curriculum” on page 85.

To browse to a location and enter a description:

1. Click the Training tab of Breeze Manager, and click the Shared Training folder or User Training folder. For more information about the library structure and permissions, see “Setting training folder permissions” on page 114.
2. Do one of the following:
   - Click a folder in the Name column to save the curriculum in a subfolder of the selected folder.
   - Click New Folder to create a folder for your curriculum. Enter a name in the Folder Name text box and click Save.

   **Note:** For information about setting folder permissions in the Training library, see “Setting training folder permissions” on page 114.

   A path to your curriculum location appears toward the top of the window.
3. When you’ve selected a location, click New Curriculum.

   The New Curriculum wizard opens, which allows you to create your curriculum.
Entering curriculum information for a new curriculum

The first page of the New Curriculum wizard lets you enter details, such as descriptive summary information and start and end dates, about the curriculum. The information that you enter in the wizard appears later on the Curriculum Info page, as well as on the page that enrollees access from their My Training link.

The first page of the New Curriculum wizard

Note: The following procedure assumes that you completed the previous procedure, “Browsing to a curriculum location” on page 84.

To enter curriculum information for a new curriculum:

1. In the Curriculum Name text box, enter a title for the curriculum.

2. In the Curriculum ID text box, you have the option of entering an identification code or number for the curriculum. You can assign any code, such as a catalog number.

3. The Custom URL text box displays the first part of the URL that users click to access the curriculum. Do one of the following:
   - Leave the text box blank to have Breeze generate a system URL that lets users enter the meeting room.
   - Enter a custom URL in the text box to specify how the remainder of the URL should read. For example, you can enter a word that describes the curriculum.

For information about creating custom URLs and a list of restricted words, see “Custom URL rules” on page 24.
4. In the Summary text box, enter a description, which users can read to learn more about the curriculum.

5. Select the date the curriculum begins in the Curriculum Starts On pop-up menu.
   
   **Note:** The start and end dates that you select override the start and end dates for the individual items in your curriculum. For example, if you add a Breeze Meeting with an end date that already passed, yet your end date for the curriculum is in the future, the Breeze Meeting assumes the end date of the curriculum.

6. Either select the date the curriculum ends in the Curriculum Closes On pop-up menu, or select No Close date and click Next to add items to the curriculum.

After you add information, you follow procedures to add items to the curriculum.

**Adding items to a new curriculum**

After you enter curriculum information in the New Curriculum wizard and click Next, a page appears that lets you add items to the curriculum. (When you add an item to a curriculum, you are actually adding a link to the item, not copying the item in a new location within Breeze.)

**Note:** If you want to group items in folders, do not add the items using the New Curriculum wizard. Instead, exit from the wizard, add the folder, and then add items to the folder. For more information, see “Adding a folder to group items in a curriculum” on page 92.

You can add the following types of items from the New Curriculum wizard:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content</td>
<td>Any Breeze or third-party content available in the Content library, such as Breeze Presentations, Macromedia Flash SWF files, Flash Video (FLV) files, JPEG files, and FlashPaper documents. You can also add Macromedia Captivate and Macromedia Authorware files. All content is AICC compliant.</td>
<td>“Adding content to a new curriculum” on page 87</td>
</tr>
<tr>
<td>Breeze course</td>
<td>A Breeze course that you can access in the Training library</td>
<td>“Adding a course to a new curriculum” on page 88</td>
</tr>
<tr>
<td>Breeze Meeting</td>
<td>A Breeze Meeting that you can access in the Meetings library</td>
<td>“Adding a meeting to a new curriculum” on page 88</td>
</tr>
</tbody>
</table>
Note: If you’d like to add external training to your curriculum, you can do so after you exit from the wizard. See “Adding external training to a curriculum” on page 94.

Adding content to a new curriculum

Note: This procedure assumes that you are adding content using the New Curriculum wizard. If you are adding content to an existing curriculum independent of the wizard, see the procedure “Adding content to a curriculum” on page 92.

You can add any files that you can access in your Content library to a curriculum.

Keep in mind that if you want to be able to track data for individual users with a curriculum item, you should add the item to the curriculum as a course, not as content.

To add Breeze content to a curriculum:

1. On the Add Items page of the New Curriculum wizard, click Add Content.

   Content in your user folder appears.

2. To select content from a different content folder, click a folder, or click the Up One Level button to browse to another folder.

3. Select the check box for the content that you want to add to the curriculum, and then click Add.

4. If you’d like to add another type of item, or otherwise manipulate the items in the list, do one of the following:
   - To add a course or Breeze Meeting, see “Adding a course to a new curriculum” on page 88 or “Adding a meeting to a new curriculum” on page 88.
   - To change the order of items in the curriculum, see “Changing the order of items within a new curriculum” on page 89.
   - To remove an item from the curriculum, see “Removing items from a new curriculum” on page 89.

5. When your list of items is complete and in the order you want, click Next.

The Additional Options page appears, which is the last page of the wizard. To exit from the wizard, see “Exiting from the New Curriculum wizard” on page 90.
Adding a course to a new curriculum

Note: This procedure assumes that you are adding a course using the New Curriculum wizard. If you are adding a course to an existing curriculum independent of the wizard, see the procedure “Adding a course to a curriculum” on page 93.

To add a Breeze course to a curriculum, you select the course from the Training library.

To add a Breeze course to a curriculum:
1. On the Add Items page of the New Curriculum wizard, click Add Course.
   Content in your User Training folder appears.
2. If necessary, browse to the folder that contains the course.
   You can click a folder or click the Up One Level button to browse.
3. Select the check box for the course that you want to add to the curriculum, and click Add.
   The course becomes part of the curriculum.
4. If you’d like to add another type of item, or otherwise manipulate the items in the list, do one of the following:
   ■ To add content or a Breeze Meeting, see “Adding content to a new curriculum” on page 87 or “Adding a meeting to a new curriculum” on page 88.
   ■ To change the order of items in the curriculum, see “Changing the order of items within a new curriculum” on page 89.
   ■ To delete an item from the curriculum, see “Removing items from a new curriculum” on page 89.
5. When your list of items is complete and in the order that you want, click Next.
   The Additional Options page appears. To exit from the wizard, see “Exiting from the New Curriculum wizard” on page 90.

Note: Invitations, enrollments, and reminders that you created for a course are not carried over when you add a course to a curriculum.

Adding a meeting to a new curriculum

Note: This procedure assumes that you are adding a meeting using the New Curriculum wizard. If you are adding a meeting to an existing curriculum independent of the wizard, see the procedure “Adding a meeting to a curriculum” on page 93.

If your Breeze account or installation includes Breeze Meeting, you can add any meeting that you can access in your Meetings library to your training curriculum.

To add a Breeze Meeting to a curriculum:
1. On the Add Items page of the New Curriculum wizard, click Add Meeting.
   Content in your User Meetings folder appears.
2. To select content from a different folder, browse to another folder by clicking the folder links or the Up One Level button.
3. Select the check box for the meeting that you want to add to the curriculum, and click Add. The meeting becomes part of your curriculum.

4. If you’d like to add another type of item, or otherwise manipulate the items in the list, do one of the following:
   - To add content or a course, see “Adding content to a new curriculum” on page 87 or “Adding a course to a new curriculum” on page 88.
   - To change the order of items in the curriculum, see “Changing the order of items within a new curriculum” on page 89.
   - To delete an item from the curriculum, see “Removing items from a new curriculum” on page 89.

5. When your list of items is complete and in the order that you want, click Next. The Additional Options page appears. To exit from the wizard, see “Exiting from the New Curriculum wizard” on page 90.

Changing the order of items within a new curriculum

You can alter your learning path by changing the order of a learning object within a curriculum. For Breeze to enforce a specific order, you can specify prerequisites, completion requirements, and test-out items after you exit from the New Curriculum wizard. For more information, see “Assigning prerequisites to an item” on page 94, “Specifying or editing completion requirements” on page 97, and “Assigning test-outs for an item or folder” on page 95.

Note: Although you can move items within a folder, you cannot move items in or out of folders.

To change the order of items within a curriculum:

- On the Add Items page of the New Curriculum wizard (see “Adding items to a new curriculum” on page 86), click the check box next to the item that you want to move, and then click either the up or down arrow to move the item up or down the list of items, in the corresponding direction.

Removing items from a new curriculum

Breeze Manager lets you remove items that you no longer want to include in your curriculum. Even though you remove the item from the curriculum, the item is still available in its respective library.

To remove an item from a curriculum:

1. On the Add Items page of the New Curriculum wizard (see “Adding items to a new curriculum” on page 86), click the check box next to the item that you want to delete, and then click Remove Item.
   A page appears that lists the items selected for deletion.
2. After verifying that you do want to delete the selections, click Delete.
Exiting from the New Curriculum wizard

After you add items to your curriculum, and you organize the items in the order that you want, you can exit from the New Curriculum wizard. This is the last step in the New Curriculum wizard.

**To exit from the New Curriculum wizard:**

1. On the Add items page of the New Curriculum wizard, click Next.
   
   The Additional Options page indicates additional tasks that you can complete for the curriculum.

2. After reviewing the information, click Finish to exit from the wizard.

3. The Curriculum Info page appears. The path to your curriculum, in the Training library, appears toward the top of the page.

For more information about tasks that you can complete from the Curriculum Info page, see the next procedure, “Viewing and modifying curriculum information” on page 90.

Viewing and modifying curriculum information

After you create a new curriculum, you can view and modify curriculum details on the Curriculum Info page, which provides the following information:

**A list of items in the curriculum**  The list of items appears on the left side of the page. To change the order of the items, see “Specifying or editing completion requirements” on page 97. To add an item, see “Adding items to a curriculum” on page 91. To remove an item, see “Removing items from a curriculum” on page 96.

**Curriculum Information**  This area includes the curriculum name, ID, summary, open date, close date, and curriculum URL. To edit this information, see “Editing curriculum information” on page 96.

**Completion Requirements**  This area specifies items required to successfully complete the curriculum. To edit the completion requirements, see “Specifying or editing completion requirements” on page 97.

**Curriculum Status**  This area shows the status information, such as the number of enrollees and the number of users who have passed the curriculum. To view additional status information, see “Viewing curriculum status information” on page 97.

**Reminder Policy**  This area indicates whether a reminder policy is enabled, to whom reminders are being sent, the date that the next reminder will be sent, and how often reminders are sent. To edit the reminder policy, see “Sending reminders to curriculum enrollees” on page 100.
To view curriculum information:
1. Click the Training tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the curriculum.
   For more information, see “Navigating the Content library” on page 35.
3. Select the name of the curriculum in the course list.
   The Curriculum Info page appears.

Changing the order of items in a curriculum

*Note:* This procedure assumes that you are modifying an existing curriculum and not using the New Curriculum wizard. If you are changing the order of items using the New Curriculum wizard, see the procedure “Changing the order of items within a new curriculum” on page 89.

You can manipulate your learning path by changing the order of a learning object in a curriculum. For Breeze to enforce a specific order, you can specify prerequisites, completion requirements, and test-out items. For more information, see “Assigning prerequisites to an item” on page 94, “Specifying or editing completion requirements” on page 97, “Assigning test-outs for an item or folder” on page 95.

To change the order of items in a curriculum:
1. If you’re not on the Curriculum Info page for the curriculum that you want to modify, click the Training tab and browse to the curriculum. Select the curriculum name to open the Curriculum Info page.
   For more information, see “Viewing and modifying curriculum information” on page 90.
2. Select the check box next to the item that you want to move, and then click either the up or down arrow to move the item up or down the list of items.

Adding items to a curriculum

*Note:* This procedure assumes that you are modifying an existing curriculum and not using the New Curriculum wizard. If you are adding items using the New Curriculum wizard, see the procedure “Adding items to a new curriculum” on page 86.

After you create a curriculum, you add items from the Curriculum Info page rather than the New Curriculum wizard. Additionally, the Curriculum Info page lets you add external training, as well as folders in which you can group items.

To add items to a curriculum:
1. If you’re not on the Curriculum Info page for the curriculum that you want to modify, click the Training tab and browse to the curriculum. Select the curriculum name to open the Curriculum Info page.
   For more information, see “Viewing and modifying curriculum information” on page 90.
2. Click Add Item.
   A page appears that lets you select the type of item to add.
3. Complete one of the following procedures:
   ■ To add a folder in which you can group items, see “Adding a folder to group items in a curriculum” on page 92.
   ■ To add content available from the Content library, see “Adding content to a curriculum” on page 92.
   ■ To add a course, see “Adding a course to a curriculum” on page 93.
   ■ To add a meeting, see “Adding a meeting to a curriculum” on page 93.
   ■ To add external training, see “Adding external training to a curriculum” on page 94.

**Adding a folder to group items in a curriculum**

You can group items in folders to create training modules, or to otherwise organize your items. For example, you can group a set of items in a Beginner Topics folder and another set in an Intermediate Topics folder. You add items to a folder similarly to the process you follow to add items to a curriculum.

*Note:* You add items to a curriculum folder rather than move items already in your curriculum into a folder. You can assign completion requests and prerequisites for the folder.

**To add a Breeze folder to a curriculum:**

1. After completing steps 1 and 2 to add items to a curriculum in “Adding items to a curriculum” on page 91, click New Folder.
2. On the New Folder page, enter a name for the folder in the Folder Name text box, and click Save.
   The curriculum now includes the folder.
   If you need to set permission for the folder, see “Setting training folder permissions” on page 114.
3. In the curriculum list, you can select the name of the folder that you just created and add items to the folder. For more information, see “Adding items to a curriculum” on page 91.

**Adding content to a curriculum**

*Note:* This procedure assumes that you are modifying an existing curriculum and not using the New Curriculum wizard. If you are changing the order of items using the New Curriculum wizard, see the procedure “Changing the order of items within a new curriculum” on page 89.

You can easily add content from your Content library to an existing curriculum.

**To add content to a curriculum:**

1. After completing steps 1 and 2 to add items to a curriculum in “Adding items to a curriculum” on page 91, click Add Content.
   Content in your User Content folder appears.
2. If necessary, browse to the folder that contains the content.
   You can click the folder links or the Up One Level button to browse.
3. Select the check box for the content that you want to add to the curriculum, and click Save.
   The content becomes part of the curriculum.

   **Note:** When a user launches content from a curriculum, the launches are not tracked in Breeze. If you want to track the number of times a user launches an item, you should add the item to the curriculum as a course.

### Adding a course to a curriculum

   **Note:** This procedure assumes that you are adding a course to an existing curriculum and not using the New Curriculum wizard. If you are adding a course using the New Curriculum wizard, see the procedure "Adding a course to a new curriculum" on page 88.

Breeze courses available in your Training library are also available for you to include in an existing curriculum.

To add a course to a curriculum:

1. After completing steps 1 and 2 to add items to a curriculum in "Adding items to a curriculum" on page 91, click Add Course.
   Courses in your user training folder appear.

2. If necessary, browse to the folder that contains the course.
   Click the folder links or the Up One Level button to browse.

3. Select the check box for the course that you want to add to the curriculum, and click Save.
   The selected items become part of the curriculum.

   **Note:** Invitations, enrollments, and reminders that you created for a course are not carried over when you add a course to a curriculum.

### Adding a meeting to a curriculum

   **Note:** This procedure assumes that you are adding a meeting to an existing curriculum and not using the New Curriculum wizard. If you are adding a meeting using the New Curriculum wizard, see the procedure "Adding a meeting to a new curriculum" on page 88.

You can add a Breeze Meeting, available in your Meetings library, to an existing curriculum.

To add a meeting to a curriculum:

1. After completing steps 1 and 2 to add items to a curriculum in "Adding items to a curriculum" on page 91, click Add Meeting.
   Meetings in your User Meetings folder appear.

2. If necessary, browse to the folder that contains the meeting.
   Click the folder links or the Up One Level button to browse.

3. Select the check box for the meeting that you want to add to the curriculum, and click Save.
   The selected items become part of the curriculum.

   **Note:** To send an Outlook Calendar Event, which lets users add the meeting to their Outlook calendars, you select the vCal option when you send meeting reminders (not when you add the meeting to your curriculum). For more information, see "Sending invitations" on page 133.
Adding external training to a curriculum

A Breeze curriculum is not limited to Breeze items. You can include external training, such as classroom training.

**Note:** When the user status changes for external training, you can update the user’s completion status manually. For more information, see “Changing the user status or score for an item” on page 104.

**To add external content to a curriculum:**

1. After completing steps 1 and 2 to add items to a curriculum in “Adding items to a curriculum” on page 91, click New External Training.
2. In the Enter Content Information area, enter the name of the external training in the Title text box.
3. In the Summary text box, enter a description of the external training, and then click Save.

On the Curriculum Info page, the external training appears in your list of items.

Editing external content information

After you add information about external training, complete the following procedure if you need to edit the information.

**To edit external content information:**

1. If you’re not on the Curriculum Info page for the curriculum that you want to modify, click the Training tab and browse to the curriculum. Select the curriculum name to open the Curriculum Info page.
   
   For more information, see “Viewing and modifying curriculum information” on page 90.
2. In the list of items, select the name of the external training.
3. In the External Training Information area, click Edit.
4. In the Item Info area, edit the Name, ID, or Summary information, and click Save.

Assigning prerequisites to an item

Associating prerequisites with other items is one way to enforce an order, or learning path, for users to follow. With Breeze Manager, you can define prerequisites and specify the importance of the prerequisite in completing the item. You can designate that the prerequisite is recommended, or that enrollees must successfully complete the prerequisite before taking the item. Additionally, you can specify that the item does not appear on the list of users training or enrollment page until the prerequisite is satisfied. You can assign prerequisites to any item or to an entire folder.

**To assign prerequisites to an item:**

1. If you’re not on the Curriculum Info page for the curriculum that you want to modify, click the Training tab and browse to the curriculum. Select the curriculum name to open the Curriculum Info page.
   
   For more information, see “Viewing and modifying curriculum information” on page 90.
2. In the list of items, click the name of the item or folder that requires a prerequisite.
3. In the Prerequisites area, click Edit.

4. The Select Prerequisite area lists the items in the curriculum. Use the pop-up menu to specify prerequisites, using the following criteria:

   **Required**    Indicates that the prerequisite must be completed before taking the item.

   **Suggested**   Indicates that the prerequisite is optional. The user receives a message requesting the user take the prerequisite before taking the item.

   **Hidden**      Indicates that the item appears on the enrollment page only after the user completes the prerequisite.

5. When you finish selecting prerequisites, click Save.

   The prerequisites appear in the Prerequisites area of the Curriculum Info page.

**Assigning test-outs for an item or folder**

You can design the curriculum so that enrollees are not required to take an item if they pass a related test-out item. You can also assign test-outs to an entire folder, to specify that users do not need to complete the items in the folder if they pass the related test-out item.

To assign a test-out for an item:

1. If you’re not on the Curriculum Info page for the curriculum that you want to modify, click the Training tab and browse to the curriculum. Select the curriculum name to open the Curriculum Info page.
   For more information, see “Viewing and modifying curriculum information” on page 90.

2. In the list of items, click the name of the item or folder that requires a test-out item. This procedure refers to this item as the *selected item*.

3. In the Test-Outs area, click Edit.

4. The Select Test-Outs area lists items in the curriculum. Use the pop-up menu by an item to designate it as a test-out for the selected item, using the following criteria:

   **Optional**     Indicates that if the enrollee passes the test-out item, the selected item is no longer required to complete the curriculum.

   **Blocked**      Indicates that if the enrollee passes the test-out item, the selected item is unavailable to the enrollee. If the enrollee fails the test-out item, the selected item becomes available.

   **Hidden**       Indicates that if the enrollee passes the test-out item, the selected item is hidden from the enrollee. If the enrollee fails the test-out item, the test-out item is visible and available for the enrollee to take.

   **Note:** You also have the option of leaving the pop-up menu blank if you do not want to designate an item as a test-out for the selected item.

5. When you finish specifying test-out items, click Save.

   The page indicates that a test-out is assigned.
Removing items from a curriculum

Note: This procedure assumes that you are modifying an existing curriculum and not using the New Curriculum wizard. If you are deleting items using the New Curriculum wizard, see the procedure “Removing items from a new curriculum” on page 89.

If you no longer want to include an item in a curriculum, you can remove it without affecting the original item that exists in its respective library.

To delete items from a curriculum:

1. If you’re not on the Curriculum Info page for the curriculum that you want to modify, click the Training tab and browse to the curriculum. Select the curriculum name to open the Curriculum Info page.
   For more information, see “Viewing and modifying curriculum information” on page 90.
2. In the list of items, select the check box next to the items that you want to remove, and then click Remove Item.
   A page appears that lists the items you selected for deletion.
3. Verify that you do want to remove the selected items, and click Delete.
   The item that you removed no longer appears in the list.

Editing curriculum information

After entering curriculum information in the New Curriculum wizard, you can edit the information from the Curriculum Info page for the curriculum.

To edit curriculum information:

1. If you’re not on the Curriculum Info page for the curriculum that you want to modify, click the Training tab and browse to the curriculum. Select the curriculum name to open the Curriculum Info page.
   For more information, see “Viewing and modifying curriculum information” on page 90.
2. In the Curriculum Information area, click Edit to edit the following information:
   - **Curriculum Name**  A title for the curriculum.
   - **Curriculum ID**  The identification number for the curriculum.
   - **Summary**  The curriculum description.
   - **Curriculum Starts On**  The date on which the curriculum starts.
   - **Curriculum Closes On**  The date on which the curriculum ends; select from the pop-up menu or select No Close date.
3. When you finish editing the curriculum information, click Save.
   Your changes appear on the Curriculum Info page.
Specifying or editing completion requirements

You can designate an item as required, which specifies that an enrollee must successfully complete the item to complete the curriculum.

You can select one or more items in a curriculum that enrollees must pass in order to successfully complete the curriculum.

**Caution:** All items in a curriculum are required, by default. If you designate at least one item in a curriculum as required, other items in the curriculum that do not have a completion requirement become optional.

**To edit completion requirements:**

1. If you’re not on the Curriculum Info page for the curriculum that you want to modify, click the Training tab and browse to the curriculum. Select the curriculum name to open the Curriculum Info page.
   
   For more information, see “Viewing and modifying curriculum information” on page 90.

2. In the Completion Requirements area, click Edit.

   A list of all items in the curriculum appears in the Select Completion Requirements area.

3. For each item that you want to specify as required for successful completion of the curriculum, select Required from the pop-up menu.

4. When you finish specifying required items, click Save.

   The Curriculum Info page includes the completion requirements that you specified.

Viewing curriculum status information

Viewing curriculum status offers another way to view a summary report. For more information about viewing curriculum reports, see “Viewing a curriculum summary report” on page 103.

**To view curriculum status information:**

1. If you’re not on the Curriculum Info page for the curriculum that you want to modify, click the Training tab and browse to the curriculum. Select the curriculum name to open the Curriculum Info page.

   For more information, see “Viewing and modifying curriculum information” on page 90.

2. In the Curriculum Status area, click View.

   The Reports tab opens on a Summary page. In addition to the same information that appears in the curriculum information area of the Curriculum Info page, the Summary page includes the following information:

   - **Enrolled Users**  The number of users enrolled in the curriculum.
   - **Total Curriculum Completions**  The number of times users completed the curriculum. (It’s possible for a user to complete a curriculum multiple times; this number includes all successful attempts.)
   - **Curriculum Completions by Unique User**  The number of times that a user completed the curriculum. Unlike the Total Curriculum Completions number, this field does not increase in number if a user completes the curriculum multiple times.
**Users Passed**  The number of users who successfully completed the curriculum.

**Users Failed**  The number of users who did not pass the items required to complete the curriculum.

For more information about reports, and how to view and download additional reports, see “About curriculum reports” on page 103.

**Managing enrollees**

Breeze Manager allows you to view and add enrollees to a curriculum, as well as set access permissions for enrollees.

**Viewing and adding enrollees to a curriculum**

In Breeze Manager, you can view or add enrollees to a curriculum.

**To view and add enrollees:**

1. If you’re not already on the Curriculum Info page for the desired curriculum, go to the Training tab in Breeze Manager and browse to the curriculum. Click the curriculum name to open the Curriculum Info page.
   
   For more information, see “Viewing and modifying curriculum information” on page 90.

2. Click Manage Enrollees.

   The page includes two lists:
   
   - **Available Users and Groups**, which lists every user or group that you can add as an enrollee.
   
   - **Current Enrollees For (Curriculum Name)**, which lists users and groups already enrolled in the curriculum.

3. To add enrollees, select the name or group in the Available Users and Groups list.

   - To select multiple users or groups, press Control-click or Shift-click, as appropriate.
   
   - To expand a group so that you can select individual names within the group, double-click the group name; when you finish, double-click Up One Level to return to the original list.
   
   - To search for a name in the list, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.
   
   - Use the Select All button to check all names on the list. The Select None button removes the check marks.

4. After selecting the enrollees, click Add.

   **Note:** After adding enrollees, you must send notification to the enrollees that the curriculum is available. See “Sending notification to curriculum enrollees” on page 99.
Setting permissions for curriculum enrollees

After you’ve added enrollees to a curriculum, you can determine permissions for enrolled users and groups.

To set permissions:
1. If you’re not already on the Curriculum Info page for the desired curriculum, go to the Training tab in Breeze Manager and browse to the curriculum. Click the curriculum name to open the Curriculum Info page.
   For more information, see “Viewing and modifying curriculum information” on page 90.
2. Click Manage Enrollees.
3. Select the enrollee or enrolled group in the Current Enrollees column and click Permissions.
4. Select one of the following permissions:
   - Enrolled allows the enrollee to access the curriculum.
   - Denied bars the enrollee from accessing the curriculum.

Deleting enrollees from a curriculum

You can easily remove an enrollee from a curriculum.

To delete enrollees:
1. If you’re not already on the Curriculum Info page for the desired curriculum, go to the Training tab in Breeze Manager and browse to the curriculum. Click the curriculum name to open the Curriculum Info page.
   For more information, see “Viewing and modifying curriculum information” on page 90.
2. Click Manage Enrollees.
3. Select the enrollee or enrolled group in the Current Enrollees column and click Remove.

Sending notification to curriculum enrollees

You can use the notifications feature in Breeze Manager to send an e-mail message to enrollees. Although you can modify the default message text to state anything, a typical message tells enrollees that the curriculum is available, provides details about the curriculum, and includes a link to the curriculum. The message can go to all enrollees, or to a specific subset of enrollees, such as those who have not completed the curriculum.

You can specify settings for e-mail notifications. See “Notification e-mail settings” on page 70.

Note: You can also send messages that remind users they’re enrolled in a curriculum. For more information, see “Sending reminders to curriculum enrollees” on page 100.
To send notification to curriculum enrollees:

1. If you’re not already on the Curriculum Info page for the desired curriculum, go to the Training tab in Breeze Manager and browse to the curriculum. Click the curriculum name to open the Curriculum Info page. For more information, see “Viewing and modifying curriculum information” on page 90.

2. If you plan to send notification to all enrollees, you can click Manage Enrollees to view who will receive notification. If necessary, follow the procedures to add or remove enrollees. See “Viewing and adding enrollees to a curriculum” on page 98, and “Deleting enrollees from a curriculum” on page 99.

3. Click Notifications. On the Notifications page, select when recipients should receive the notification.
   - Send Notification Now sends the message when you click Send.
   - Send Notification on Start Date sends the message on the date when the curriculum begins.
   - Send On allows you to use the pop-up menus to select a date on which to send the message.

4. Select one of the following Recipients options, which specifies who receives the message:
   - All Enrollees: Send the message to every individual or group listed in the Current Enrollees column on the Manage Enrollees page.
   - Enrollees Who Have Not Completed the Curriculum: Send notification only to users who have not finished the curriculum.
   - Enrollees Who Have Failed or Not Completed the Curriculum: Send notification to both users who have not passed items, and to users who have not completed the curriculum.
   - Only to Specific E-mail Addresses: Send notification to users whose e-mail addresses you enter in the Specific E-mail Address text box.

5. If you selected Only to Specific E-mail Addresses in the previous step, enter the addresses, separated by a comma, in the Specific E-mail Address text box.

6. The Message area displays the text that appears in the notification. Modify the text as desired.

7. To send the e-mail notification to the recipients, click Send.

Sending reminders to curriculum enrollees

The reminders feature in Breeze Manager, similar to the notification feature, lets you send e-mail messages to enrollees. The primary difference between notifications and reminders, however, is that the Reminders page lets you send the messages at specified intervals. The message can go to all enrollees, or to a specific subset of enrollees.

For information about sending notification messages, see “Sending notification to curriculum enrollees” on page 99.

Breeze sends reminders from the person who creates the curriculum, using the e-mail address specified in the curriculum creator's Breeze account.

Breeze sends e-mail reminders individually; recipients do not see the list of other recipients in the message header.
To send reminders to curriculum enrollees:

1. If you’re not already on the Curriculum Info page for the desired curriculum, go to the Training tab in Breeze Manager and browse to the curriculum. Click the curriculum name to open the Curriculum Info page.
   For more information, see “Viewing and modifying curriculum information” on page 90.

2. If you plan to send reminders to all enrollees, you can click Manage Enrollees to view who will receive notification. If necessary, follow the procedures to add or remove enrollees. See “Viewing and adding enrollees to a curriculum” on page 98, and “Deleting enrollees from a curriculum” on page 99.

3. Do one of the following:
   ■ Click Reminders at the top of the Breeze Manager window.
   ■ Click Edit in the Reminders Policy area.

4. On the Reminders page, Disable Curriculum Reminders is the default selection. To enable the feature, select Send Curriculum Reminders.

5. In the Starting pop-up menus, select the date when Breeze Manager should send the first reminder.

6. Select one of the following Recipients options to specify who receives the message:
   - **Select All Enrollees**  Send the message to every individual or group listed in the Current Enrollees column on the Manage Enrollees page.
   - **Select Enrollees Who Have Not Completed the Curriculum**  Send notification only to users who have not finished the curriculum.
   - **Select Enrollees Who Have Failed or Not Completed the Curriculum**  Send notification to users who have not passed items, and to users who have not completed the curriculum.
   - **Select Only to Specific E-mail Addresses**  Send notification to users whose e-mail addresses you enter in the Specific E-mail Address text box.

7. If you selected Select Only to Specific E-mail Addresses in the previous step, enter the addresses, separated by commas, in the Specific E-mail Address text box.
   The Message area displays the text that appears in the notification.

8. Modify the text, and then click Save.
Disabling reminders

Breeze Manager is set, by default to not send reminders to enrollees. If you’ve changed the default setting, and you determine that you do not want to send reminders, you can specify that Breeze not send e-mail reminders to curriculum enrollees.

To disable reminders:
1. If you’re not already on the Curriculum Info page for the desired curriculum, go to the Training tab in Breeze Manager and browse to the curriculum. Click the curriculum name to open the Curriculum Info page.
   For more information, see “Viewing and modifying curriculum information” on page 90.
2. Click Reminders. On the Reminders page, select Disable Curriculum Reminders, and then click Save.
   Note: For information about sending e-mail reminders, see “Sending reminders to curriculum enrollees” on page 100.

Deleting a curriculum

Before you delete a curriculum, be aware of the following affects of this action:

- The curriculum does not appear in the Training library.
- Enrollees can no longer access the curriculum.
- Reports for the curriculum are no longer available.
- Curriculum reminders are not sent.
- Any delayed curriculum notifications are not sent.

If you want to prevent access to a curriculum but retain reporting information, set the curriculum close date and do not delete the curriculum.

You can delete a curriculum from the Training library without affecting the library items that comprise the curriculum.

To delete a curriculum:
1. If you’re not already on the Curriculum Info page for the desired curriculum, go to the Training tab in Breeze Manager and browse to the curriculum. Click the curriculum name to open the Curriculum Info page.
   For more information, see “Viewing and modifying curriculum information” on page 90.
2. In the course list, select the check box next to the curriculum that you want to delete, and then click Delete.
   A page appears that lists the curriculum that you selected for deletion.
3. After verifying that you do want to delete the selection, click Delete.
About curriculum reports

You can view reports, which provide summaries, statistical information, and status information about a curriculum. You can view data for the overall curriculum, for individual users, and by item.

**Note:** If a course in the curriculum was made available to users before the course was added to the curriculum, any data that existed for that individual course appears in the curriculum report. If you do not want prior data to appear in the curriculum report, you can recreate any courses that existed before you created the curriculum.

For specific information about generating reports, see the following procedures:

<table>
<thead>
<tr>
<th>For the following report type</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>A general report that offers data such as the number of users and their status</td>
<td>“Viewing a curriculum summary report” on page 103</td>
</tr>
<tr>
<td>Data about enrollees, such as if the user has completed the curriculum</td>
<td>“Viewing a curriculum report by users” on page 104</td>
</tr>
<tr>
<td>A report by item, which offers data, such as the number of users who finished taking the item</td>
<td>“Viewing a curriculum report by item” on page 105</td>
</tr>
<tr>
<td>Reports for items completed outside of the Breeze environment</td>
<td>“Viewing a summary report for an external training” on page 106 and “Viewing a report for an external training by users” on page 107</td>
</tr>
</tbody>
</table>

**Viewing a curriculum summary report**

A Summary report offers general information about a curriculum, including the number of enrollees and the number of users who passed the curriculum.

**To view a curriculum Summary report:**

1. If you’re not already on the Curriculum Info page for the desired curriculum, go to the Training tab in Breeze Manager and browse to the curriculum. Click the curriculum name to open the Curriculum Info page.
   
   For more information, see “Viewing and modifying curriculum information” on page 90.

2. Click the Reports link, toward the top of the Breeze Manager window.

   Breeze Manager opens, by default, on the Summary report page. In addition to the information that appears in the Curriculum Information area of the Curriculum Info page (such as Curriculum Name, Curriculum ID, Summary information, and open and close dates), the report contains the following information:

   **Enrolled Users**  The number of users enrolled in the curriculum.

   **Total Curriculum Completions**  The number of times users completed the curriculum (it’s possible for a user to complete a curriculum multiple times; this number includes all successful attempts.).

   **Curriculum Completions by Unique User**  The number reflects each time a user completed the curriculum. Unlike the Total Curriculum Completions number, this field does not increment if a user completes the curriculum multiple times.
**Users Passed**  The number of users who successfully completed the curriculum.

**Users Failed**  The number of users who did not pass the items required to complete the curriculum.

**Viewing a curriculum report by users**

You can view general report data about curriculum enrollees, such as the date on which the user completed the curriculum.

**To view a curriculum report by users:**

1. If you’re not already on the Curriculum Info page for the desired curriculum, go to the Training tab in Breeze Manager and browse to the curriculum. Click the curriculum name to open the Curriculum Info page. For more information, see “Viewing and modifying curriculum information” on page 90.

2. Click the Reports link, toward the top of the Breeze Manager window.

3. Click By Users to view the following information for each enrollee:

   **Name**  The name of the enrollee.

   **Status**  Where the user stands in terms of completing the item. For more information, and to change the status for this item, see “Changing the user status or score for an item” on page 104.

   **Score**  The percentage of correct answers.

   **Date Completed**  The date on which the enrollee completed the item.

   **Certificate #**  A system-generated number that proves the user completed the curriculum and provides the user with a unique ID.

   **Attempts**  The number of times in which the enrollee tried to complete the item successfully.

4. To change the number of users who appear in the list, select a different number in the Display pop-up menu.

**Changing the user status or score for an item**

The user Status field in a report contains one of the following values:

**Not taken**  The user did not access the item.

**Passed**  The user completed the item with a passing score.

**Failed**  The user completed the item, but did not achieve a passing score.

**Complete**  The user completed the item (for items that do not specify a passing score).

**Incomplete**  The user accessed the item but has not completed the item.

The Status field updates each time user status changes for items that Breeze Manager tracks. If the user status changes for an external training, you can manually change the status in Breeze.
To change the user status:
1. If you’re not already on the Curriculum Info page for the desired curriculum, go to the Training tab in Breeze Manager and browse to the curriculum. Click the curriculum name to open the Curriculum Info page.
   For more information, see “Viewing and modifying curriculum information” on page 90.
2. Click the Reports link, toward the top of the Breeze Manager window.
3. Click By Users.
4. In the Name column, click the name of the enrollee whose status you want to change.
   A list of items assigned to the enrollee appears. The status column indicates the status for each item.
5. To change the status of an item, click Override and select a different status in the Status pop-up menu.
6. Enter the score in the Score text box and click Save. (For items without an associated pass or fail score, you can enter 0.)
   The updated status appears on the Users report.

Viewing a curriculum report by item

You can view a curriculum report by item, by selecting the item and selecting the type of report you want to view.

To view a curriculum report by item:
1. If you’re not already on the Curriculum Info page for the desired curriculum, go to the Training tab in Breeze Manager and browse to the curriculum. Click the curriculum name to open the Curriculum Info page.
   For more information, see “Viewing and modifying curriculum information” on page 90.
2. Click the Reports link, toward the top of the Breeze Manager window.
3. Click By Item.
   A list appears of all items in the curriculum. The Reports column indicates the type of report that you can generate for each item.
4. Click the link for the type of report that you want to view.

The steps for viewing, downloading, and setting report filters for each item are identical to the procedures for viewing reports in each library. External training, however, is an exception because it does not appear in a Breeze library. To view reports for external training, see “Viewing a summary report for an external training” on page 106 and “Viewing a report for an external training by users” on page 107.

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Report Type</th>
<th>See</th>
</tr>
</thead>
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<tr>
<td>Content</td>
<td>By Summary</td>
<td>“Content reports” on page 55</td>
</tr>
<tr>
<td></td>
<td>By Users</td>
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<tr>
<td></td>
<td>By Slides</td>
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<td></td>
<td>By Questions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>By Answers</td>
<td></td>
</tr>
<tr>
<td>Course</td>
<td>By Summary</td>
<td>“Course reports” on page 79</td>
</tr>
<tr>
<td></td>
<td>By Users</td>
<td></td>
</tr>
<tr>
<td></td>
<td>By Slides</td>
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<tr>
<td></td>
<td>By Questions</td>
<td></td>
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<tr>
<td></td>
<td>By Answers</td>
<td></td>
</tr>
<tr>
<td>Meeting</td>
<td>By Summary</td>
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</tr>
<tr>
<td></td>
<td>By Participants</td>
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</tr>
<tr>
<td></td>
<td>By Sessions</td>
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<td></td>
<td>By Polls</td>
<td></td>
</tr>
<tr>
<td>External Training</td>
<td>By Summary</td>
<td>“Viewing a summary report for an external training” on page 106</td>
</tr>
<tr>
<td></td>
<td>By Users</td>
<td>and “Viewing a report for an external training by users” on page 107</td>
</tr>
</tbody>
</table>

**Viewing a summary report for an external training**

Before generating a summary report for external training, you must update the user status or score for users who have completed the training. See “Changing the user status or score for an item” on page 104.

**To view a summary report for external training:**

1. Verify that you’re on the Reports > By Item page (complete steps 1 through 5 of “Viewing a curriculum report by item” on page 105).

2. For external training in the Names column, click the Summary link to view information for each enrollee.
Viewing a report for an external training by users

Before generating a report for external training by users, you must update the user status or score for users who have completed the training. See “Changing the user status or score for an item” on page 104.

To view a curriculum report by users:
1. Verify that you’re on the Reports > By Item page (complete steps 1 through 5 of “Viewing a curriculum report by item” on page 105).
2. For an external training in the Names column, click the By Users link to view the following information for each enrollee:
   - **Name** The name of the enrollee.
   - **Status** The progress the user made toward completing the item. For more information, and to change the status for this item, see “Changing the user status or score for an item” on page 104.
   - **Score** The total score.
   - **Date Completed** The date on which the enrollee completed the item.
   - **Certificate #** A system-generated number that proves the user completed the curriculum and provides the user with a unique ID.

About setting and removing report filters

As with other applications in Breeze Manager, you can further define the information you see on a particular report by setting report filters. Keep in mind that filters that you set apply to all reports that you create, both for curricula and for any other Breeze applications.

For information on setting report filters, see “Setting and removing report filters” on page 25.

Downloading curriculum reports

You can export curriculum By Item reports to an Excel file by clicking the Download Report Data button on the Reports page. You have the option of saving or opening the report.

To download reports:
1. Follow the procedure “Viewing and modifying curriculum information” on page 90 to view the Curriculum Info page for the curriculum requiring a report.
2. On the Curriculum Info page, click Reports.
3. Click By Item.
   In the list of report types for each item, you can download report data for all reports on the list except the Summary report.
4. Click the report type for which you’ll download data.
5. Complete one of the following steps:
   - To download the report, click Download Report Data and either save or open the file.
   - To view a report by slides or by questions in a browser window, click Printable Version.
About the Training Dashboard

The Training Dashboard displays information about the number of enrollees who completed a particular course or curriculum. For information on the Training Dashboard, see “Viewing the Training Dashboard” on page 59.
CHAPTER 7
Managing the Training Library

Note: This chapter applies only to accounts that include the Macromedia Breeze Training application.

This chapter specifically addresses the administrative tasks for maintaining the Training library. As such, it describes the library and provides procedures for the file and folder management activities that Macromedia Breeze users can perform within it. Such users are normally training managers or administrators, but can also include anyone with Manage permissions for the file or folder to be managed. For a list of the tasks that you can perform in the Training library, as well as links to the procedures for each task, see the table in “Training library tasks” on page 111.

For information on how to work with courses or curriculums, including creating courses and curriculums, as well as viewing and changing information for a specific course or curriculum, see Chapter 5, “Working with Courses,” on page 63 or Chapter 6, “Working with Training Curriculums,” on page 81. For background information on the Macromedia Breeze Training application, see Chapter 4, “About Training,” on page 57.

Structure of the Training library

The Training library contains all Macromedia Training files and folders organized in three high-level folder directories. You access the Training library by clicking the Training tab at the top of the Macromedia Breeze Manager window. As you navigate the training folders, the names of the folders appear in a navigation trail at the top of the browser window.

File management in the Training library is permissions-based. For a description of training permissions, see “About Training library permissions” on page 58.
The following figure shows the structure of the Training library:

**Shared Training folder**

By default, only administrators have Manage permissions for the Shared Training folder. They can create folders in it and can assign Manage permissions for these folders to other users. These users, who may or may not be training managers, can then place courses or curriculums in the Shared Training folder, which multiple users can access and manipulate. However, although any Breeze user with Manage permissions can manage a Shared Training folder, only training managers can create new courses or curriculums in these folders.

**User Training folder**

The User Training folder includes one folder for each training manager. When a user is assigned to the Training Managers group, Breeze automatically creates an individual user folder for this training manager in User Training. Administrators can manage all folders in this folder, whereas training managers can only manage their own individual folder. Other users who are not training managers cannot manage folders in the User Training folder unless they have been assigned Manage permissions, either by the administrator or by the folder’s owner; nor can such users create new courses or curriculums in any User Training folder they manage; only training managers can do this.
My Training folder

Each training manager has an individual folder in the User Training folder. The name of the folder is the training manager’s e-mail address. Although training managers have a My Training shortcut in the application that only points to their individual folder in the User Training folder, administrators can manage all the individual user folders. Normally, only a training manager can manage their individual user folder in the User Training folder, but in some cases, the training manager or an administrator might also assign Manage permissions for this folder to other users.

Training library tasks

The following table describes and directs you to procedures for all the file management tasks you can perform in the Training library if you have Manage permissions for the file or folder to be manipulated.

<table>
<thead>
<tr>
<th>Task</th>
<th>See</th>
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<tbody>
<tr>
<td>Open a folder and move up and down through folder levels.</td>
<td>“Navigating the Training library” on page 111</td>
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<tr>
<td>Set up a new folder in the Training library.</td>
<td>“Creating a training folder” on page 112</td>
</tr>
<tr>
<td>Move a course or curriculum to a different folder.</td>
<td>“Moving a course or curriculum” on page 113</td>
</tr>
<tr>
<td>Move a training folder to a different location in the Training library.</td>
<td>“Moving a training folder” on page 113</td>
</tr>
<tr>
<td>Delete folders in the Training library.</td>
<td>“Deleting a training folder” on page 114</td>
</tr>
<tr>
<td>Assign permissions to a training folder.</td>
<td>“Setting training folder permissions” on page 114</td>
</tr>
<tr>
<td>Add or remove users or groups for a training folder’s access list.</td>
<td>“Modifying the permission access list” on page 116</td>
</tr>
</tbody>
</table>

Navigating the Training library

You can navigate the Training library if you know the location of the course or curriculum you want to view or if you want to browse the Training library.

Navigation controls exist for the following tasks:

- “Opening a folder” on page 111
- “Moving up one folder level” on page 112
- “Returning to any folder” on page 112

Opening a folder

You can open a folder by clicking the folder name in the folder list.

To open a training folder:

1. Click the Training tab at the top of the Breeze Manager window.
2. Click the name of a folder.
   - The folders and files in that folder appear.
Moving up one folder level

You can move up to the parent folder, which is one level above the current folder, by clicking the Up One Level button in the navigation bar above the folder list.

To move up one folder:
• Click the Up One Level button in the navigation bar above the course list.
  The folders and files in the parent folder appear.

Returning to any folder

Above the navigation bar is a trail of navigation links called the navigation trail, which indicates your current location in the directory structure. You can move to any folder, not just the one immediately above the current folder, by clicking the name of the folder in the navigation trail.

To move to any parent folder:
• Click the name of the parent folder in the navigation trail above the navigation bar.
  The folders and files within the selected folder appear.

Managing training files and folders

Administrators and users with permission to manage a specific Training library folder can organize the Training library by performing the following tasks:

• Creating a training folder
• Moving a course or curriculum
• Moving a training folder
• Deleting a training folder
• Setting training folder permissions
• Modifying the permission access list

Creating a training folder

Follow this procedure to organize files and folders related to a specific topic. For example, training managers can use this procedure to create a new course folder in their individual My Training folder. Alternatively, an administrator might create a new folder in the Shared Training folder that is available for special use to a particular department in the organization.

To create a training folder:
1. Click the Training tab at the top of the Breeze Manager window.
2. Navigate to the location where you want to add the new folder; for information, see “Navigating the Training library” on page 111.
3. Click the New Folder button, located in the menu bar above the file and folder list.
  The New Folder page appears.
4. Enter the name of the new folder.
5. Click the Save button to create the new folder.

The name of the folder appears in the navigation trail at the top of the page.

Moving a course or curriculum

Administrators and users with permission to manage a specific Training library folder can move a course or curriculum within this folder to another folder. In this case, the user must have Manage permission for both the original and target folders.

To move a course or curriculum:
1. Click the Training tab at the top of the Breeze Manager window.
2. Navigate to the location of the course or curriculum that you want to move; for more information, see “Navigating the Training library” on page 111.
3. Click the check box to the left of the course or curriculum that you want to move.
4. Click the Move button, located in the menu bar above the file and folder listing.
   A new window appears, listing the item that you have selected and letting you specify its new folder location.
5. Navigate to the folder location where you want to place the course or curriculum by clicking the target folder title or the Up One Level button.
   As you navigate to the new location, the new destination is shown in the upper right of the Breeze Manager window.
6. Click the Move button.
   The Move Successful page appears, confirming that the move was successful.
7. Click OK.
   The folder list from which you moved the item appears without the item you moved.

Moving a training folder

When you move a training folder, all the courses or curriculums in the folder also move to the new location. To move a training folder, the user must have Manage permission for both the original and target folders.

To move a training folder:
1. Click the Training tab at the top of the Breeze Manager window.
2. Navigate to the location of the training folder that you want to move; for more information, see “Navigating the Training library” on page 111.
3. Click the check box to the left of the folder that you want to move.
4. Click the Move button in the menu bar above the training listing.
   A new window appears, listing the item that you have selected, and letting you specify their new folder location.
5. Select the folder titles or click the Up One Level button to navigate to the folder location where you want to place the training folder.

As you navigate to the new location, the new destination location is shown in the upper right of the Breeze Manager window.

6. Click the Move button.

The Move Successful page appears, confirming that the move was successful.

7. Click OK.

The folder list from which you moved the items appears without the item you moved.

**Deleting a training folder**

When a folder is deleted, all the course and curriculum files in the folder, as well as any subfolders, are permanently deleted and you cannot retrieve the information.

**To delete a training folder:**

1. Click the Training tab at the top of the Breeze Manager window.

2. Navigate to the folder that you want to delete; for more information, see “Navigating the Training library” on page 111.

3. Click the check box to the left of the folder that you want to delete.

4. Click the Delete button in the menu bar above the training listing.

The delete confirmation page appears. If other items are linked to this folder, you see a warning message.

5. On the delete confirmation page, click the Delete button to delete the selected items.

The course and curriculum list appears without the deleted folder.

**Setting training folder permissions**

By default, when you create a training folder in the Training library (see “Creating a training folder” on page 112), the folder permissions are set to Same As Parent; that is, the new folder has the same permissions profile as the folder in which it is created. If the parent folder permissions are adequate for your purposes, there is no need to set folder permissions. If the permissions are not adequate, however, you can create a custom permission profile, which is described in this section. Creating a custom permission profile is a necessary workaround because you cannot set permissions for a course or curriculum folder in a training folder that are different than those of the parent folder.
When you customize the permission settings for a training folder, you can select either of the following options:

**Create a custom permissions profile for users and groups**  Add users or groups to the profile and set the access for each user or group to Denied or Manage. User or group permissions that you set for this folder take precedence over permissions that are set for the parent folder.

**Reset to Parent**  If a custom permissions profile has already been created for a training folder, you can select to reset it to the permissions profile of its parent folder by clicking the Reset To Parent button.

*Note:* To set permissions for a specific folder, you must first open it.

**To set permissions for a training folder:**

1. Click the Training tab at the top of the Breeze Manager window.
2. Navigate to the training folder whose permissions you want to set; for more information, see “Navigating the Training library” on page 111.
3. Click the name of the training folder whose permissions you want to set to open it.
   The page displays the files and folders in the open folder.
4. Click the Set Permissions button in the navigation bar.
   One of the following pages appears:
   - If this folder has already been customized, the Set Permissions page appears with the Available Users and Groups list on the left and the Current Permissions list on the right.
     To modify this list, go to step 6.
     To reset to the permissions to the parent folder, click the Reset To Parent button above the Available Users and Groups list.
   - If this folder has never been customized, the customize page appears with the message “Current Setting: same as parent folder.”
     To maintain the same setting, click OK to return to the meetings and folders listing page.
     To customize the permissions, proceed to step 5.
5. Click the Customize button.
   The Set Permissions page appears with the Available Users and Groups list on the left and the Current Permissions list on the right.
6. Create a custom profile for this folder or modify the existing profile by doing one of the following in the Available Users and Groups list:
   - Press Control-click or Shift-click to select multiple users or groups.
   - To expand a group so you can select individual members, double-click the group name; when you are done with this group, double-click Up One Level in the list to return to the parent folder list.
   - To search for a name in the list, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.
7. Click the Add button. The users and/or groups you added appear in the Current Permissions list; to remove a name from this list, select it and click Remove.

8. Assign permissions for each user and group in the Current Permissions list as follows:
   a. Select a name in the list:
      - Press Control-click or Shift-click to select multiple users or groups.
      - To search for a name, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.
   b. For each selected name, click the Permissions button at the bottom of the window.
      - A pop-up permissions menu appears.
   c. Click the permission appropriate for the selected names.
      - The permission you selected appears next to the name in the Current Permissions list.

Modifying the permission access list

You can change the permission for a training folder by adding or removing users and groups from the list. This process lets you control exactly who has a specific type of access to your training.

To add a user or group to the permission access list:
1. Click the Training tab at the top of the Breeze Manager window.
2. Navigate to the training folder whose permissions you want to set; for more information, see “Navigating the Training library” on page 111.
3. Click the name of the training folder to open it.
   - The page displays the files and folders in the open folder.
4. Click the Set Permissions button in the navigation bar.
   - One of the following pages appears:
     - If this folder has already been customized, the Set Permissions page appears with the Available Users and Groups list on the left and the Current Permissions list on the right.
       - To add users or groups, go to step 6.
     - If this folder has never been customized, the customize page appears with the message “Current Setting: same as parent folder.”
       - To add users or groups, proceed to step 5.
5. Click the Customize button.
   - The Set Permissions page appears with the Available Users and Group list on the left and the Current Permissions list on the right.
6. To add users or groups, do one of the following in the Available Users and Groups list:
   - Press Control-click or Shift-click to select multiple users or groups.
   - To expand a group so you can select individual members, double-click the group name; when you are done with this group, double-click Up One Level in the list to return to the parent folder list.
   - To search for a name in the list, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.

7. Click the Add button.
   The users and/or groups you added appear in the Current Permissions list; to remove a name from this window, select it and click Remove.

8. Assign permissions for each user and group in the Current Permissions list as follows:
   a. Select a name in the list:
      - Press Control-click or Shift-click to select multiple users or groups.
      - To search for a name, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.
   b. For each selected name, click the Permissions button at the bottom of the window.
      A pop-up permissions menu appears.
   c. Click the permission appropriate for the selected name.
      The permission you selected appears next to the name in the Current Permissions list.

To remove a user or group from the permission access list:
1. Click the Training tab at the top of the Breeze Manager window.
2. Navigate to the training folder whose permissions you want to set; for more information, see “Navigating the Training library” on page 111.
3. Click the name of the training folder to open it.
   The page displays the files and folders in the open folder.
4. Click the Set Permissions button in the navigation bar.
   One of the following pages appears:
   - If this folder has already been customized, the Set Permissions page appears with the Available Users and Groups list on the left and the Current Permissions list on the right.
   - To delete users or groups, proceed to step 6.
   - If this folder has never been customized, the customize page appears with the message “Current Setting: same as parent folder.”
   - To delete users or groups, proceed to step 5.
5. Click the Customize button.
   The Set Permissions page appears with the Available Users and Group list on the left and the Current Permissions list on the right.
6. To delete users or groups, do one of the following in the Current Permissions list:
   - Press Control-click or Shift-click to select multiple users or groups.
   - To search for a name in the list, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.

7. Click the Remove button.
   The users and/or groups you removed disappear from the Current Permissions window.
A Macromedia Breeze Meeting is an online real-time meeting in which a host or presenter can show slides or multimedia presentations, share screens, chat, and broadcast live audio and video. A Breeze Meeting takes place in a Breeze meeting room, a Macromedia Flash application that you run in a browser window using Macromedia Flash Player.

You create both the Breeze Meeting and the meeting room in Breeze Manager. All meeting rooms reside in a library of files called the Meetings library.

Accessing the Meetings library

You reach the Meetings library through the Meetings tab, which contains meetings that you or others have created. Depending on your permissions, you can join these meetings or modify the meetings themselves. For more information, see Chapter 9, “Working with Meetings,” on page 127.

The meetings for which you are scheduled appear on the Breeze Manager Home tab, not the Meetings tab. For details, see Chapter 1, “Understanding the Workspace,” on page 15. For all other meeting activities, click the Meetings tab to open the Meetings page, and if necessary, click the appropriate link to navigate to the meeting that you want. For more information, see “Structure of the Training library” on page 109 and “Navigating the Training library” on page 111.

About meeting terminology and attributes

Before you attend or create and manage meetings, you should become familiar with Breeze Meeting terminology and some of the characteristics of Breeze Meetings. The following sections explain what you should know:

• “Meeting versus meeting room” on page 120
• “Meeting roles” on page 120
Meeting versus meeting room

Macromedia Breeze Manager is unique among web meeting applications because you use it to schedule online meetings at particular times and to create meeting rooms. You create a virtual meeting room before the meeting starts. Just like a real meeting room, the virtual meeting room continues to exist after the meeting is over.

A Macromedia Breeze Meeting is a gathering of people and resources in a particular place on a particular day between certain start and end times. The meeting itself exists only for that period of time. Breeze Meetings can be recurring, like weekly physical meetings in which attendees regularly return to the room, or they can be one-time meetings.

A meeting room exists before, during, and after the meeting. Its location is a URL, assigned by the system when the meeting is created. When you click the URL, you start the Flash application in your browser. After you do so, you enter a virtual meeting room that Flash has constructed for you. Here you can perform online all those activities that you do in a physical meeting room, including viewing slides, chatting, and asking questions.

Because Breeze meeting rooms exist between meeting sessions, a meeting host can enter the room to set up, add content to, and customize meeting rooms, and these changes remain between meetings.

In addition, depending upon the pricing model your organization has purchased, you might or might not be able to enter a meeting if there is no live meeting. In some cases, only the host can enter the meeting room when the meeting is not live. In others, you can enter the meeting room when the meeting is not live if there are enough meeting room “spaces” across the system at the moment you enter.

Meeting roles

As the host of a Breeze Meeting, you create the meeting and can add Breeze users to the meeting’s list of attendees. You specify each attendee’s permissions for the meeting as one of the following roles:

**Presenter** A presenter can share screens, chat, broadcast live audio and video, customize the meeting room layout, and show the participants content that includes Breeze Presentations, slides (PPT files), Flash application files (SWF files), Flash Video files (FLV files), HTML files (HTML and HTM files), and images (JPEG files).

**Participant** A participant can view the content that the presenter is showing or sharing, hear and see the presenter’s audio and video broadcast, use text chat, and broadcast their own audio and video, if given permission.

**Host** A host sets up the meeting, invites the guests, chooses the content, and assigns both presenter and participant roles to the attendees. A host can also perform all the tasks that a presenter can.

For procedures on setting permissions for meeting attendees, see Chapter 9, “Working with Meetings,” on page 127.
For more information on participating and presenting in Breeze Meetings, see *Macromedia Breeze Meeting User Guide for Participants* or *Macromedia Breeze Meeting User Guide for Hosts and Presenters*.

**Types of meeting participants**

There are two types of access within the participant category for Breeze Meetings:

**Registered Breeze users and accepted guests only** Individuals who share the same Breeze account with the meeting host. In this case, *registered* means having a valid Breeze account; it does not refer to the registration process that applies to an event (see "Meeting registration" on page 121). Registered Breeze users must enter their Breeze user name and password to enter the meeting room, and Breeze can generate an individual attendance report for the meeting.

An accepted guest is someone who has been accepted into the room by the host and, although this person's attendance is added to the total number of meeting attendees on meeting reports, no individual attendance report is available.

Invitees who share the same Breeze account as the host see the meeting listed under My Scheduled Meetings (or, if the meeting has been scheduled as an event, under My Scheduled Events) on the Home tab when they log in to Breeze Manager. Here, they can join the meeting by clicking the Enter button for that meeting. In addition, if the user also has Microsoft Outlook and has received and accepted an invitation for this meeting, the meeting is automatically scheduled in the user's Outlook calendar, making it possible to join from there as well.

**Anyone** Accessible to anyone who receives the meeting URL.

**Meeting registration**

Depending on the type and purpose of a given meeting, the meeting host might want to have the guests register. If so, the host must have the Event Management tab as part of the Breeze Manager application, since registration for any meeting, training, presentation, or seminar can only be done through the Event Management tab. A meeting host who has this tab must first create the meeting from the Meetings tab using the Meeting wizard (see Chapter 9, “Working with Meetings,” on page 127), but skip the select participant and send invitations steps. After this, the host creates an event using the Present a Breeze Meeting option in the Event wizard, and selects the meeting that has been created as the event.

The Event wizard lets the host select and invite users, select and customize registration questions, and send invitations, even to large e-mail lists. For information about events, see Chapter 14, “About Events” and Chapter 15, “Working with Events”.

If the meeting is presented as an event, all guests, regardless of whether they have a Breeze account or whether the URL is public, must provide registration information prior to the meeting. In this case, the host has the option of reviewing the registration applications before the meeting and approving or denying admittance to each registrant.
About permissions

There are two different aspects of permissions to consider when working with meetings:

**Attendance roles permissions** Define the roles that event attendees play in a given meeting: participant, presenter, and host. For information, see “Meeting roles” on page 120.

These permissions are assigned at meeting creation time (see “Meeting room templates” on page 123). However, the meeting host can modify them during the meeting or after the meeting as well. To change attendance roles permissions after the meeting, the host must open the meeting file and edit the participant list to add, remove, or change attendance permissions. However, to do so, the host must also have Manage permissions for the folder that this meeting is in. In addition, any users, whether or not they are meeting hosts, can modify a meeting’s attendance permissions if they have Manage permissions for the folder that contains this meeting.

**Meetings library management permissions** Define who can perform the different tasks associated with the Meetings library files and folders, such as adding and deleting files, searching the library archives, and so on. The ability to create, delete, and edit meetings in various folders in the Meetings library is determined by the groups a user belongs to, and the individual permissions that are assigned to a user for specific files and folders. For a description of the Meetings library permissions, see “Meetings library permissions and permission types” on page 123.

**Meetings permissions for Built-in groups**

Breeze recognizes six default permission groups, each of which is associated with a different Breeze library. Each member of a Built-in group has an individual user folder within the corresponding library. You cannot change the permissions for these groups, but you can extend them by assigning individuals or groups to more than one Built-in group. In addition, the administrator can create custom groups, and assign these groups the appropriate permissions to specific library folders. The Built-in groups are as follows:

- Administrators
- Meeting Hosts
- Training Managers
- Seminar Hosts
- Event Managers
- Authors

The Meeting Hosts group is associated with the Meetings library, which means that each meeting host has an individual User Meetings folder named My Meetings within the library for which they have Manage permissions. The permissions for the Meeting Hosts group enable hosts to create meetings and perform all file management activities for their User Meetings files and folders, including assigning Manage permission to other users.
Users do not need to be members of the Meeting Hosts group to manage a Meetings library file or folder. Any user can be assigned Manage permissions for a specific file or folder by an administrator, or by someone with Manage permissions for that file or folder. What such users cannot do, however, is to create new meetings. Only members of the Meeting Hosts group can do this. See “Meetings library permissions and permission types” on page 123 and “Structure of the Training library” on page 109.

Meetings library permissions and permission types

Meetings library permissions control which folders a user can access. Two permission types exist for the Meetings library: Manage and Denied. Unlike the Content library, the Meetings library doesn’t have Publish or View permission types.

Manage and Denied permissions are associated with library folders and are associated with file management functions, not with access to a specific meeting that exists within a given folder. Access to a particular meeting is determined by the meeting role permissions (participant, presenter, and host; see “Meeting roles” on page 120), which the meeting host assigns at meeting creation time. If you change the role permissions after the meeting, you must make the change at the file level, where the Edit Participants functionality is operable.

To manage a meeting folder in the Meetings library, you must have Manage permissions for the folder that you are manipulating. To edit a meeting or change the participants list for a meeting, you must be the meeting host (that is, the person who created the meeting), and also have Manage permissions for the folder that contains the meeting.

Meeting room templates

A meeting room template is a layout for a meeting room that a meeting host can modify, share, and reuse. Breeze offers three default templates that you can alter to accommodate your needs:

• Meeting template, which is the standard Breeze Meeting format
• Training template, which is used by subject matter experts to create formal web-based training sessions
• Events template, which is used for webinars

Templates can only be selected for meetings and seminars. This means, for example, that you cannot use the training template in a course, even if your organization has purchased the Training tab. If you do have access to the Training tab, however, you can use the training template in a curriculum. To do this, you first create a meeting selecting the training template and incorporating the meeting into your curriculum. You can also use the training template for a meeting or a seminar for training purposes, but it will not have quizzes associated with it; for this, you must have access to the Training tab.

Similarly, you would only use the events template for a meeting or a seminar that is presented as an event.
Because a meeting room template is just a meeting room in a meeting template folder, you can open the template, enter the meeting room, and edit its layout from within the meeting room itself. If you are a meeting host, you can set up a meeting room template in one of two ways:

- Select the meeting room template you want in the Shared Templates or My Templates folder, then click the New Meeting button to create a new template from scratch with the default layout. You can then enter the new meeting room and make any changes to better serve the needs of the particular meeting.
- Enter an existing meeting, change the layout as appropriate, and move the meeting into the appropriate template folder.

When you use a particular template to create a meeting or another template, Breeze copies the layout from this template into the room you are creating, including the content that the template references. The copy process happens the very first time you launch the meeting room. Past meetings that have used this template are unaffected, however.

You can save the customized template in either the Shared Templates folder so that it is available to others, or in the My Templates folder, which is in your personal My Meetings folder. If you save the customized template in the Shared Templates folder, you are giving all future users of this template permission to view any meeting room content stored as part of the template, whereas templates saved in the My Templates folder are for your own use.

For information on customizing meeting rooms, see Breeze Meeting User Guide for Hosts and Presenters.

Meeting tasks

The following table describes the different activities associated with meetings and directs you to the appropriate procedure in this guide for performing the task.

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</table>
If you are a meeting host, you can use Macromedia Breeze Manager for all functions relating to Macromedia Breeze Meetings except conduct a live meeting. You can do the following from Breeze Manager:

- Get information about a meeting
- Join a meeting as a participant
- Create a meeting
- Modify an existing meeting
- Enter a meeting room during and between meetings
- View archived meetings
- View meeting reports
- Manage the files in the Meetings library, if you have the proper permissions

This chapter explains how to perform the functions necessary for a specific meeting, such as viewing meeting information, joining a meeting, creating a meeting, and viewing meeting reports. It also gives procedures for sending meeting invitations, as well as changing specific attributes of a meeting after it has been created.

This chapter does not address file or folder management tasks for the Meetings library, however. For this information, see Chapter 10, “Managing the Meetings Library,” on page 143. In addition, before you join or create a meeting, you should learn about the meeting terms, concepts, and features in Macromedia Breeze Manager. For this information, see Chapter 8, “About Meetings,” on page 119.

Finally, for information on participating and presenting in Breeze Meetings, see Macromedia Breeze Meeting User Guide for Participants or Macromedia Breeze Meeting User Guide for Hosts and Presenters.
Getting information about a meeting

If you are scheduled to attend a Breeze Meeting that has been created by a meeting host who shares the same Breeze account to which you belong, the meeting name appears on the list under My Scheduled Meetings on the Home tab in your Breeze Manager window. If you have more scheduled meetings than can appear on the Home tab list, you can click the More button at the bottom of the list to view them. Alternatively, you can display your list of scheduled meetings by clicking the My Scheduled Meeting link at the top of the page.

To find information about a meeting, you must bring up the Meeting Information page, as explained below.

**To access the Meeting Information page:**

- Click the meeting name under My Scheduled Meetings on the Home tab.

The Meeting Information page appears with the following details:

- **Meeting name**  
  The meeting’s title.

- **Summary**  
  A brief description of the meeting.

- **Start time**  
  The date and time that the meeting begins.

- **Duration**  
  The projected length of time of the meeting.

- **URL**  
  The web address where the meeting is to occur (the meeting room’s virtual location).

- **Status**  
  The current state of the meeting; for example, whether the meeting is in progress or there are no participants in the room.

- **Language**  
  The language in which the meeting will be conducted.

- **Telephony information**  
  The telephone number for participants who call in to this meeting and the code that they must enter (only necessary when the meeting is in progress).

From here, you can click the Enter Meeting Room button to join the meeting.

Joining a meeting

If you are scheduled to attend a Breeze Meeting that has been created by a meeting host who shares the same Breeze account to which you belong, the meeting name appears on the list under My Scheduled Meetings on the Home tab in your Breeze Manager window. In addition, if you have Microsoft Outlook and have accepted the invitation to the meeting, it appears on your Outlook calendar.

When you join a meeting, it may or may not be a live meeting that is in progress. Use the date and time shown for the meeting to determine if it is in progress. If the date is in the past, it appears on your meeting list under expired meetings.

Depending on the pricing model your organization has purchased, you might or might not be able to enter a meeting if it isn’t live. In some cases, only the host can enter the meeting room when the meeting is not live. In others, participants can enter the meeting room when the meeting is not live if there are enough meeting room “spaces” across the system at the moment of entry. In this situation (depending upon the meeting room set up), even if the meeting has expired, you can still enter the room to view content and listen to recordings made of the meeting.
Creating a meeting

Not all participants at Breeze Meetings necessarily have Breeze accounts. This depends on parameters set by the meeting’s host at meeting creation time. For example, the meeting might be public; alternatively, it might require registration and preapproval. For details on the different types of guests that can participate in meetings, see “Types of meeting participants” on page 121 and “Meeting registration” on page 121.

To enter a scheduled meeting:

1. On the Home tab under My Scheduled Meetings, scroll to the name of the meeting that you want to enter.
   Alternatively, you can click My Scheduled Meetings in navigation bar to display a longer list, and select the name from here.

2. Click the Enter button.

A browser window opens, loads, and then displays the meeting room for this meeting. For instructions on participating in a meeting, see Breeze Meeting User Guide for Participants.

Creating a meeting

If you are setting up a meeting that does not require registration, use the Meeting wizard from the Meetings tab as explained in this chapter, including selecting participants and sending invitations. For the relevant procedures, see the following steps:

• Step one: This step enables you to create the meeting room, which involves giving the meeting a name and description, setting the meeting date and duration, assigning the type of access, designating the audio conference settings, and selecting the meeting room template. See “Entering meeting information” on page 130.

• Step two: This step enables you to select your meeting attendees from a list of available users and groups, and to assign meeting attendance roles to each one. See “Selecting participants” on page 132.

Usually, you select participants when you create the meeting. In some situations, however, you may prefer to do this at a later date. If you want to defer participation selection, you can create the meeting, and then modify the meeting later to select your participants. You can also alter an existing participant list or change any e-mail options that you have already set up. For more information, “Changing the meeting participant list” on page 138.

• Step three: This step enables you to send e-mail invitations to the potential attendees whom you selected in step two. You have five options: you can choose not to send invitations at all, you can send invitations to all attendees, to hosts only, to presenters only, or to participants only. You can also have an Outlook invitation sent to your prospective guests that they can accept or decline. If they accept, the meeting is scheduled in their Outlook calendar and they can join the meeting from there. See “Sending invitations” on page 133.

As is the case with participant selection, you can defer sending invitations until a later date, then modify the meeting to set up your invitation options and send the invitations once the meeting has been created. See “Sending meeting invitations” on page 140.
Creating a meeting with registration

If you want to incorporate registration as part of your meeting, you must have the Event Management tab as part of your Breeze installation; see “Meeting registration” on page 121. If you do, and want to create this meeting as an event, see Chapter 14, “About Events,” on page 195 and Chapter 9, “Working with Meetings,” on page 127.

Starting the Meeting wizard

You have two options for starting the Meeting wizard. If you want to create the meeting in your individual My Meetings folder, you can click New Meeting under “Create” on the Home tab. When you do, the first page of the Meeting wizard appears; see “Entering meeting information” on page 130.

Alternatively, to create your meeting in another folder for which you have Manage permission, navigate to this folder in the Meetings library (for more information, see “Navigating the Meetings library” on page 145) and click the New Meeting button. This displays the first page of the Meeting wizard. See “Entering meeting information” on page 130.

Entering meeting information

The first step in the Meeting wizard is to enter meeting profile information. You can edit the meeting information any time after the meeting is created. For details, see “Editing a meeting profile” on page 137.

Meeting Name  A required field that appears in the meeting list and reports.

Custom URL  An optional field that lets you recreate a personalized URL for this meeting that is reusable and easy to remember. If you do not enter one, the system automatically generates a URL for you. For information you must know before using a custom URL, see “Custom URLs” on page 24.

Summary  A meeting description that appears on the Meeting Information page. A meeting summary can have a maximum of 750 characters.

Start Time  The month, day, year, and time that the meeting starts.

Note: Depending on the meeting pricing model your organization uses, if you change the meeting start date to a future date, participants and presenters might still be able to enter the meeting room at any time after you create the meeting. When you are logged in to a meeting room, you can stop participants from entering the room between meetings. For more information, see Macromedia Breeze Meeting User Guide for Hosts and Presenters.

Duration  The approximate time (in hours and minutes) that the meeting will last.

Template  The layout of the meeting room; select from the pop-up menu. Breeze offers default templates that you can modify to accommodate the purpose of the meeting. For a description of templates and how to work with them, see “Meeting room templates” on page 123.
Meeting Access There are two options:

Registered Breeze users and accepted guests only Individuals who share the same Breeze account with the meeting host. In this case, registered means having a valid Breeze account; it does not refer to the registration process that applies to an event. Registered Breeze users must enter their Breeze user name and password to enter the meeting room, and Breeze can generate an individual attendance report for the meeting.

An accepted guest is someone who has been accepted into the room by the host and, although this person's attendance is added to the total number of meeting attendees on meeting reports, no individual attendance report is available.

Anyone Anyone who has the URL for the meeting can enter the room. In this case, no attendance report is available.

For more information, see “Types of meeting participants” on page 121:

Do not include any audio conference with this meeting Select this if no one will call in to the meeting.

Include Premiere audio conference with this meeting Only visible to Premiere audio conference users; if you are a Premiere audio conference user, select if applicable.

Include other audio conference with this meeting Audio conference users other than Premiere users can select this box if they want to include the following telephony information:

- Conference number: the telephone number for attendees who call in to the meeting. This information is included in the e-mail meeting invitation for attendees.
- Moderator Code: The code that identifies the meeting host to the telephone-conferencing system. This code does not appear on the e-mail invitations, but the meeting host sees it when logging in to the web application.
- Participant Code: The code that identifies the participant to the telephone-conferencing system. This code appears on the e-mail invitation with the conference telephone number.

To enter meeting information:

1. Enter a meeting name on the Enter Meeting Information page.
2. If appropriate, enter a custom URL.
3. Enter a summary.
4. Select the month, day, year, and time for the meeting start date.
5. Select the duration of the meeting (hours and minutes).
6. Select a template for this meeting from the pop-up menu.
7. Click the appropriate Access option to designate who can attend the meeting.
8. Click the appropriate Audio Conference Setting options; if you are adding audio conferencing, type in the call-in number and participant code.

9. Choose either of the following options:
   - Click the Next button if you want to select participants at this time. This displays the Select Participants page, with a list of Available Users and Groups on the left and the Current Participant list on the right. See “Selecting participants” on page 132.
   - Click the Finish button to end the Meeting wizard without selecting participants or sending meeting invitations at this time.

**Selecting participants**

If you limited your meeting to invited guests only in the previous step of the Meeting wizard (see “Entering meeting information” on page 130), the next step is to select the meeting participants and assign meeting attendance roles. If you are creating a meeting that anyone can attend if they have the URL, see “Sending invitations” on page 133.

For a Registered Users and Accepted Guests Only meeting, you can select users and groups to be participants, presenters, or co-hosts in your meeting. These are the only Breeze users who can be assured they can log in to the meeting. Uninvited users who have the URL to the meeting room can attempt to log in as guests. In this case, as a host, you can grant admission to guests on an individual basis.

You can also change the meeting participants or presenters any time after you create the meeting. For more information, see “Changing the meeting participant list” on page 138.

**To select meeting participants:**

1. In the Available Users and Groups list, do one of the following to select the users and/or groups that you want to invite to this meeting:
   - Press Control-click or Shift-click to select multiple users or groups.
   - To expand a group to select any individual members, double-click the group name; when you are done with selection, double-click Up One Level in the list to restore the original list.
   - To search for a name in the list, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.

2. Click the Add button.

   The users and/or groups you added appear in the Current Participants list; to remove a name from this list, select it and click Remove.

3. Do the following to assign attendee role permissions to the participants:
   a. Select the name in the Current Participants list.
   b. Click the Permissions button at the bottom of the Current Participants list.
   c. Click the appropriate permission for this name (participant, presenter, or host); for information on meeting attendee roles, see “Meeting roles” on page 120.
4. Do either of the following:
   ■ To send invitations, click the Next button.
     If you have selected Registered Users and Accepted Guests Only, the Send Invitations page appears with multiple options and a default message for your invitation. See “Sending invitations” on page 133.
     If you have selected Anyone, the Send Invitations page appears with the URL and the Send E-mail Invitations button. See “Sending invitations” on page 133.
   ■ To end the wizard without sending invitations at this time, click Finish. To send invitations at a later date, see “Sending meeting invitations” on page 140.

Sending invitations

The final step in the Meeting wizard is to send meeting invitations. A meeting invitation is an e-mail invitation sent to meeting participants informing them about the meeting date, time, duration, and location. The invitation process differs depending on the type of meeting that you are having:

Registered Breeze users only and accepted guests  Individuals who share the same Breeze account with the meeting host. In this case, registered means having a valid Breeze account; it does not refer to the registration process that applies to an event (see “Meeting registration” on page 121). Registered Breeze users must enter their Breeze user name and password to enter the meeting room, and Breeze can generate an individual attendance report for the meeting. If you selected this option, you can select which group of attendees you want to send an invitation to (all presenters and participants, presenters only, or participants only) and modify the default message subject and text as appropriate. Breeze automatically sends the invitation to the appropriate groups. You can also attach a Microsoft Outlook calendar invitation so that participants can add the Breeze meeting to their calendars.

An accepted guest is someone who has been accepted into the room by the host and, although this person's attendance is added to the total number of meeting attendees on meeting reports, no individual attendance report is available.

Anyone  Anyone who receives the meeting URL. Click the Send E-mail Invitations button to create an e-mail invitation in your own e-mail application. The new message contains a prepopulated subject (Breeze Meeting Invitation) and a prepopulated message (containing the meeting date, time, duration, location, and summary) that you can edit.

You can also send meeting invitations any time after the meeting is created. For more information, see “Sending meeting invitations” on page 140.

To send invitations for a Registered Breeze Users Only meeting:
1. On the Send Invitation page, select the Send Invitations option.
2. Select the group to whom you want to send the invitation in the To pop-up menu: all hosts, presenters, and participants, hosts only, presenters only, or participants only.
3. Edit the subject and the message body as appropriate.
4. Do one of the following:
   ▪ To let participants add the event to their Outlook calendars, leave the Yes check box selected
     next to Attach Microsoft Outlook Calendar Event (vCal) to E-mail Message.
   ▪ To refrain from including an Outlook invitation, clear the Yes check box.

5. Click the Finish button.
   The Meeting Information page appears.

To send invitations for a meeting open to anyone:
1. On the Meeting Information page, click the Send E-mail Invitations button.
   A new message starts in your e-mail applications.
2. Select the users to whom you want to send the invitation from your address book or enter their
e-mail addresses manually.
3. Edit the e-mail subject and message.
4. Send the e-mail invitation.
5. Return to Breeze Manager, and click the Finish button.
   The Meeting Information page appears.

Working with existing meetings
To view or modify an existing meeting, you need not be the meeting's host. However, you must
have Manage permissions for the folder that contains this meeting. For more information about
permissions, see “About permissions” on page 122.

Viewing and modifying meeting information
The Meeting Information page is your starting point for viewing and changing any information
about a specific meeting. This is the page that appears when you click the meeting name in the
Meeting List. The Meeting Information page displays a profile of the meeting and provides links
to pages with more detailed information that you can review or manipulate. Using the Meeting
Information page, you have access to the following:

• A profile that describes the meeting; see “Viewing a meeting summary” on page 135 and
  “Editing a meeting profile” on page 137
• A participant list; see “Viewing a participants list” on page 135 and “Changing the meeting
  participant list” on page 138
• Meeting invitations options; see “Sending meeting invitations” on page 140
• A list of the meeting's uploaded content; see “Viewing an uploaded content list” on page 135
• A list of recordings made of the meeting; see “Viewing a recordings list” on page 136
• Meeting reports; see “Meeting reports” on page 142
Viewing a meeting summary

This information appears on the Meeting Information page. There are two ways to bring up this page. You can access this information from the Home tab; for information, see “Getting information about a meeting” on page 128. You can also navigate to the meeting from the Meetings tab.

To view a meeting profile from the Meetings tab:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the meeting for which you want to get information; for more information, see “Navigating the Meetings library” on page 145.
3. Click the name of the meeting in the meeting list.

The Meeting Information page appears.

Viewing a participants list

If you have Manage permissions for a particular meeting, you can view a list of all invited participants for each meeting room. However, if this meeting is presented as an event, you must view the information in the Event Management tab. For information, see Chapter 15, “Working with Events”.

To view a meeting participants list:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the meeting for which you want to get information; for more information, see “Navigating the Meetings library” on page 145.
3. Click the meeting name in the list.
4. Click the Edit Participants link on the navigation bar.

The names of invited participants and groups appear.

To edit the list of participants, see “Changing the meeting participant list” on page 138.

Viewing an uploaded content list

If you have Manage permissions for a meeting folder, you can view a list of all content that has been uploaded to the Breeze server from a meeting room within that folder.

To view a meeting uploaded content list:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the meeting for which you want to get information; for more information, see “Navigating the Meetings library” on page 145.
3. Click the meeting name in the list.

The Meeting Information page appears.
4. Click the Uploaded Content link on the navigation bar.
   A list of all uploaded content appears. From here, you can do any of the following:
   ■ To see the information about a specific item in the list, click on the item's name, then go to
     step 5. for further options.
   ■ To move this content to the Content library, see “Moving meeting recordings to the
     Content library” on page 150
   ■ To delete this content, see “Deleting uploaded content” on page 149.
5. Do either of the following:
   ■ To change the title or summary for the piece of uploaded content, click Edit, make your
     changes on the Edit page, and click Save.
   ■ To return to the uploaded content list, click Return To Uploaded Content.

Viewing a recordings list

If you are an administrator or have Manage permissions for a meeting folder, you can view a list of
all meeting recordings that have been uploaded to the Breeze server from a meeting room within
that folder.

To view a meeting recordings list:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the meeting for which you want to get information; for
   more information, see “Navigating the Meetings library” on page 145.
3. Click the meeting name in the list.
   The Meeting Information page appears.
4. Click the Recordings link on the navigation bar.
   A list of all recordings for the meeting room appears. From here, you can do any of the
   following:
   ■ To see the information about a specific item in the list, click on the item's name, then go to
     step 5. for further options.
   ■ To move this content to the Content library, see “Moving meeting recordings to the
     Content library” on page 150
   ■ To delete this content, see “Deleting a meeting recording” on page 151.
5. To change the title or summary for specific recording, click Edit, make your changes on the Edit
   page, and click Save.
Editing a meeting profile

If you are an administrator or a user with Manage permissions for this meeting folder, you can modify the following meeting properties on the Meeting Information page:

**Meeting Name**  A required field that appears in the meeting list and in reports.

**Summary**  A meeting description that appears on the Meeting Information page. A meeting summary can be as many as 750 characters long.

**Start time**  The month, day, year, and time that the meeting starts.

*Note:* Depending on the meeting pricing model your organization uses, if you change the meeting start date to a future date, participants and presenters might still be able to enter the meeting room at any time after you create the meeting. When you are logged in to a meeting room, you can stop participants from entering the room between meetings. For more information, see Macromedia Breeze Meeting User Guide for Hosts and Presenters.

**Duration**  The meeting’s length in hours and minutes that the meeting will last.

**Meeting Access** There are two options:

**Registered Breeze users only and accepted guests**  Individuals who share the same Breeze account with the meeting host. In this case, registered means having a valid Breeze account; it does not refer to the registration process that applies to an event (see “Meeting registration” on page 121). Registered Breeze users must enter their Breeze user name and password to enter the meeting room, and Breeze can generate an individual attendance report for the meeting. If you selected this option, you can select which group of attendees you want to send an invitation to (all presenters and participants, presenters only, or participants only) and modify the default message subject and text as appropriate. Breeze automatically sends the invitation to the appropriate groups.

An accepted guest is someone who has been accepted into the room by the host and, although this person’s attendance is added to the total number of meeting attendees on meeting reports, no individual attendance report is available.

**Anyone**  Anyone who receives the meeting URL. Click the Send E-mail Invitations button to create an e-mail invitation in your own e-mail application. The new message contains a prepopulated subject (Breeze Meeting Invitation) and a prepopulated message (containing the meeting date, time, duration, location, and summary) that you can edit.

For more information, see “Types of meeting participants” on page 121:

**Audio Conference Settings**  Whether there are audio conference settings necessary for this meeting, and if so, the telephone number, moderator code, and participant code for the guests who are calling in.

If you did not add audio conference settings when you initially created the meeting, and you want to add them while you are in the meeting itself, you can use the procedure below to create them in Breeze Manager, but in this case, you must first have all users log out of the meeting, add the telephony information, and wait five minutes. For more information, see the Breeze Manager User Guide for Hosts and Presenters.
To edit a meeting’s information:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the meeting for which you want to get information; for more information, see “Navigating the Meetings library” on page 145.
3. Click the meeting name in the list.
   The Meeting Information page appears.
4. Click the Edit Information link on the navigation bar.
   The Edit Information page appears.
5. Edit the meeting information.
6. Click the Save button.
   The Meeting Information page reappears with the new information.

Changing the meeting participant list
If you are an administrator or have Manage permissions for this meeting’s folder, you can add or remove participants for a meeting and change a participant’s permission setting (host, presenter or participant).

Participants who are removed from the meeting do not receive any notification; they simply cannot access the meeting unless the meeting’s access is changed to allow anyone who has the meeting URL to enter.

To add meeting participants:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the meeting for which you want to get information; for more information, see “Navigating the Meetings library” on page 145.
3. Click the meeting name in the list.
   The Meeting Information page appears.
4. Click the Edit Participants link on the navigation bar.
   The Edit Participants page appears.
5. In the Available Users and Groups list, do one of the following to select the names of the users or groups you want to add for your meeting:
   - Press Control-click or Shift-click to select multiple users or groups.
   - To expand a group to select any individual members, double-click the group name; when you are done with selection, double-click Up One Level in the list to restore the original list.
   - To search for a name in the list, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.
6. Click Add.
   The name(s) you selected appear in the Current Participants list.
7. For each new participant user or group that you added, select the appropriate permission type (participant, host, or presenter) from the pop-up Set User Role menu at the bottom of the Current Participants list.
   The user role you assigned for this user appears next to this user’s name in the list.
8. Click a link in the navigation bar to perform the next task or return to the Edit Information page.

To remove meeting participants:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the meeting for which you want to get information; for more information, see “Navigating the Meetings library” on page 145.
3. Click the meeting name in the list.
   The Meeting Information page appears.
4. Click the Edit Participants link on the navigation bar.
   The Edit Participants page appears.
5. In the Current Participant list, do either of the following to select the groups or users you want to remove:
   - Press Control-click or Shift-click to select multiple users or groups.
   - To search for a name in the list, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.
6. Click the Remove button.
   The name no longer appears in the Current Participants list.
7. Click a link in the navigation bar to perform the next task or return to the Edit Information page.

To change a participant’s meeting permission:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the meeting for which you want to get information; for more information, see “Navigating the Meetings library” on page 145.
3. Click the meeting name in the list.
   The Meeting Information page appears.
4. Click the Edit Participants link on the navigation bar.
   The Edit Participants page appears.
5. In the Current Participants list, do either of the following to select the users or groups whose meeting permissions you want to change:
   - Press Control-click or Shift-click to select multiple users or groups.
   - To search for a name in the list, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.
6. For each name, select the new user role (presenter, participant, or host) that you want to assign from the pop-up Set User Role menu at the bottom of the Current Participants list.

7. Click a link in the navigation bar to perform the next task or return to the Edit Information page.

**Sending meeting invitations**

You can send invitations for a specific meeting if you are an administrator or have Manage permissions for this meeting's folder.

A meeting invitation is an e-mail invitation sent to meeting participants to tell them about the meeting date, time, duration, and location. The way that invitations are sent depends on the type of meeting:

**Registered Breeze guests**  If your meeting is for Breeze users only, you create a custom e-mail message from within Breeze Manager. You can send the e-mail invitation to all hosts, participants and presenters, presenters only, or participants only. You can customize the subject and message body. You can also attach a Microsoft Outlook calendar invitation so that participants can add the Breeze meeting to their calendars.

**Anyone**  If your meeting is open to anyone who receives the meeting URL, click the Send E-mail Invitations button to create an e-mail invitation in your own e-mail application. The new message contains a prepopulated subject (Breeze Meeting Invitation) and a prepopulated message (containing the meeting date, time, duration, location, and summary) that you can edit.

**To send invitations for a registered Breeze guests-only meeting:**

1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the meeting for which you want to get information; for more information, see "Navigating the Meetings library" on page 145.
3. Click the meeting name in the list.
   The Meeting Information page appears.
4. Click the Invitations link on the navigation bar.
   The Invitations page appears.
5. Select the group to which you want to send the invitation in the To pop-up menu: hosts, participants, and presenters, presenters only, or participants only.
6. Edit the subject and the message body if appropriate.
7. Leave the check box selected next to the Attach Microsoft Outlook Calendar Event (vCal) to E-mail Message option if you want to include a Microsoft Outlook Calendar invitation; otherwise, clear the check box.
8. Click the Send button.
   The Meeting Information page appears.
To send invitations for a meeting open to anyone:

1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the meeting for which you want to get information; for more information, see “Navigating the Meetings library” on page 145.
3. Click the meeting name in the list.
   The Meeting Information page appears.
4. Click the Invitations link on the navigation bar.
   The Invitations page appears with the meeting details.
5. Do either of the following as appropriate:
   ■ Click the Send E-Mail Invitations button.
     A new blank message opens in your e-mail application.
   ■ Manually open a blank e-mail page, then copy and paste in the meeting URL shown in the meeting’s details.
6. Type in the e-mail addresses of the people to whom you want to send the e-mail invitation or add them from your address book.
7. Edit or type, as appropriate, the e-mail subject and message.
8. Send the e-mail invitation.
   The Meeting Information page appears.

Viewing the Dashboard

The Meeting Dashboard provides a graphical representation of statistical data about your meetings. To see the Dashboard, click the Meeting Dashboard link under the tab bar, at the top of the Meetings window. The data, which reflects all the meetings you have created, appears in three bar graphs; clicking in any of these brings up the Summary Report for this meeting (see “Meeting reports” on page 142):

**Most Active Meetings Over Last 30 Days**  Determined by the number of sessions.

**Most Participants Meetings Over Last 30 Days**  Determined by the number of participants.

**Most Viewed Archives Over Last 30 Days**  Determined by the number of views (that is, the number of times each archived meeting has been viewed).

The bar graphs appear within the Breeze Manager Meetings tab. However, you can also export the Dashboard to a browser window to print. To do this, click the Printable Version button on the left, above the display.
Meeting reports

The Reports feature of Breeze Manager lets you create reports that show you a given meeting from different perspectives. To use this feature, open the Meeting Information page (see “Viewing and modifying meeting information” on page 134), and then click the Reports link above the Meeting Information title bar. This displays links that let you define the following information that you can see for this meeting:

**Summary**  The first report type that appears when you access the Reports feature. The Summary shows you aggregate meeting information (that is, a profile of the meeting), which includes: name; viewing URL; Unique Sessions (a single instance in which a given user has joined and exited the meeting); the last time that any invitee entered the meeting room (Most Recent Session); number of people invited; number of those who attended; and the greatest number of people who entered the room at any one time (Peak Users).

**By Attendees**  Lists the name and e-mail address of each meeting participant, as well as the time they entered the meeting and the time they left it.

**By Sessions**  Lists the start and end time of each session and the session number; clicking on the session number displays the participant list for this session, including participant name and entry and exit times for each participant.

**By Polls**  Lists each poll by number and question. You can drill down to three separate views by clicking the appropriate link under the Report columns:

- “View answer distribution” displays a pie chart in which each answer is color-coded with a unique color
- “Responses” provides an answer key that lists each answer for this poll and its corresponding answer number; these numbers map to the pie chart
- “View users” shows a list of all the participants who responded in this poll and the number of the answer they selected; if the poll question allowed multiple responses, these are all shown for this user

Setting and removing report filters

Where appropriate, you can further define the information you see on a particular report by specifying report filters. For meeting files, these filters are operable for the By Attendee and By Session report types. For a description of report filters and procedures for setting and removing them, see “Setting and removing report filters” on page 25.

Downloading reports

You can export both the By Attendee and By Sessions reports to a CSV (Comma Separated Values) file by clicking the Download Report Data button below the report types links. After you do so, you have the option of saving or opening the report. If you are running Breeze Manager in an Internet Explorer browser and choose to open the report, Windows automatically opens it in Excel. In this case, you must double-click each cell to see its information. Another option is to save the CSV file to your desktop, then select Notepad from the Accessories menu (by clicking Start, Accessories, then Notepad), and open the file from Notepad, which makes it easier to read.
CHAPTER 10
Managing the Meetings Library

This chapter explains the administrative tasks for maintaining the Meetings library. It describes the library and provides procedures for the file and folder management activities that Breeze users can perform within the library. The Breeze users who can manage files and folders in the library are administrators or any other user who has Manage permissions for those files or folders. For a list of the tasks that Breeze users can perform in the Meetings library, as well as links to the procedures for each, see the table in “Meetings library tasks” on page 145.

This chapter does not discuss meetings per se. For information on how to work with meetings, including joining and creating meetings, as well as viewing and changing information for a specific meeting, see Chapter 9, “Working with Meetings,” on page 127. For background information Macromedia Breeze Meeting terminology and concepts, see Chapter 8, “About Meetings,” on page 119.

Structure of the Meetings library

The Meetings library contains all Macromedia Breeze meeting rooms organized in three high-level folders. You access the Meetings library by clicking the Meetings tab at the top of the Breeze Manager window. As you navigate the meeting folders, the names of the folders are displayed as a navigation trail at the top of the browser window.

Not all Breeze users can access the Meetings library, and even when they can, they can only access those folders within it for which they have Manage permissions. For a description of Meetings library permissions, see “Meetings library permissions and permission types” on page 123.
The Meetings library is structured as follows:

### Shared Meetings folder

When Breeze is installed in your organization, only your Breeze administrator has access privileges to the Shared Meetings folder. The administrator then creates subfolders within it and assigns Manage permissions for these folders in any way appropriate for your particular organization. However, although any Breeze user can be assigned Manage permissions for the Shared Meetings folder, only members of the Meeting Hosts built-in group can create new meetings within it. For information on Built-in groups, see “Built-in groups” on page 259.

### User Meetings folder

The User Meetings folder includes one folder for each meeting host. When a user is assigned to the Meeting Host group, Breeze automatically creates an individual user folder in the User Meetings folder. Administrators can manage all folders in this folder, whereas meeting hosts can manage only their own folders. Other users can manage individual folders only if they have been assigned Manage permissions for these folders.

### My Meetings folder

Each meeting host has an individual meeting folder within the User Meetings folder that is identified in the Meeting List by the host's user name. This folder appears in the navigation links on the Meetings tab as My Meetings, which is actually a shortcut in Breeze Manager that points to the host's folder in the User Meetings folder. Administrators can manage all the individual user folders. Normally, no one but a meeting host can manage their individual user folder in the User Meetings folder, but in some cases, the folder owner or an administrator might also assign Manage permissions for this folder to other users as well.
### Meetings library tasks

Within the Meetings library, you can perform the following tasks:

<table>
<thead>
<tr>
<th>Task</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open a folder and move up and down through folder levels.</td>
<td>“Navigating the Meetings library” on page 145</td>
</tr>
<tr>
<td>Locate profile information and content for past meetings.</td>
<td>“Searching the Meetings library archives” on page 146</td>
</tr>
<tr>
<td>Move a meeting to another folder.</td>
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### Navigating the Meetings library

You can perform the following tasks in the Meetings library:

- “Opening a folder” on page 146
- “Moving up one directory level” on page 146
- “Returning to any folder” on page 146
Opening a folder

You open a folder by clicking the folder name in the Meeting List. If the folder doesn't appear in the list, look in a different directory by following the procedure below.

To open a folder:
1. Click the Meetings tab located at the top of the Breeze Manager window.
2. Click the name of the appropriate directory (Shared Meetings, User Meetings, or My Meetings) in the navigation list.
3. Click the name of the folder.

The folders and files within that meeting folder appear, and the name of the selected folder appears in the navigation trail at the top of the browser window.

Moving up one directory level

You can move to the parent folder, the folder one level above the current folder, by clicking the Up One Level button on the navigation bar above the meeting list.

To move up one folder:
• Click the Up One Level button on the navigation bar above the meeting list.

The folders and files within the folder appear. The name and location of the folder appear in the navigation trail at the top of the browser window.

Returning to any folder

Above the functional links is a list of navigation links called the navigation trail, which indicates your current location in the directory structure. You can move to any folder, not just the one immediately above the current folder, by clicking the name of the folder in the navigation trail.

To return to any folder:
• Click the name of the folder in the navigation trail list.

The folders and files within the folder appear.

Searching the Meetings library archives

If you want meeting content and recordings to be available to other Breeze users, you must archive them in the Content library (for procedures, see “Moving uploaded content to the Content library” on page 149 and “Moving meeting recordings to the Content library” on page 150). You can also create archives of a Macromedia Breeze Meeting from within the live meeting itself (see Breeze Meeting User Guide for Hosts and Presenters).

Once the meeting content and recordings have been moved to the Content library, Breeze users with the proper permissions can use keywords to quickly locate archived information, including any Breeze content that was presented in the meeting. The text box for entering search keywords is located on the right end of the Breeze Manager tab bar.
For a detailed explanation of why you should archive meeting information in the Content library, see “About moving meeting contents to the Content library” on page 147; for instructions on searching the meetings archives, see “Searching the Content library” on page 36.

**Moving and deleting meetings and meeting content**

This section explains how to move and delete meetings, as well as the content and recordings associated with a specific meeting. You can perform these functions only if you are a Breeze administrator or a user with permissions to manage a specific Meetings library folder. See the following procedures for details:

- “About moving meeting contents to the Content library” on page 147
- “Moving a meeting to a folder” on page 148
- “Deleting a meeting” on page 148
- “Moving uploaded content to the Content library” on page 149
- “Deleting uploaded content” on page 149
- “Moving meeting recordings to the Content library” on page 150
- “Deleting a meeting recording” on page 151

**About moving meeting contents to the Content library**

Content that is loaded from a meeting room is stored only as part of that room; although the content is technically in the Meetings library, it is not immediately available for use in any other room. This means that you need to upload content again to every new meeting room that you create. By moving your uploaded content to your Content library folder, you make it accessible from every other room. You can also make this content available to other people’s rooms, if they have the proper access permissions or if the content is public.

When you load content into a meeting room from the Content library, you are simply making a reference to the content, not actually copying or moving it. You can reference the content from any meeting room, so you do not have to move content from the content folder to a specific meeting folder. The only way to populate a meeting room with content is to do it from within the room.

Recordings of a meeting contain everything that transpired in the meeting, both visually and aurally. Like the meeting content, recordings remain part of the meeting room and are not available to anyone without access permissions to that meeting room. Moving the recordings to the Content library preserves an archive of the meeting that is available to anyone with the proper permissions.

For information on uploading content outside of the meeting environment, see “Adding new content to the Content library” on page 44. For more information on uploading content from within a meeting, see *Breeze Meeting User Guide for Hosts and Presenters*.
Moving a meeting to a folder

You can move a specific meeting from one meeting folder to another if you are an administrator or a user with permission to manage both the original and target folders in the Meetings library.

To move a meeting:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the meeting that you want to move; for more information, see “Navigating the Meetings library” on page 145.
3. Click the check boxes that are located to the left of the meetings you want to move.
4. Click the Move button on the menu bar above the meeting list.
   A new window appears, listing the items that you selected and letting you specify their new folder location.
5. Navigate to the folder location where you want to place the meetings by clicking the folder titles or the Up One Level button.
   As you navigate to the new location, the new destination appears in the upper right of the Breeze Manager window.
6. Click the Move button.
   The Move Successful page appears, confirming that the move was successful.
7. Click OK.

Deleting a meeting

Administrators or users with permissions to manage a specific Meetings library folder can delete meetings in this folder.

When you delete a meeting, the following occurs:

- The meeting is removed from the Meetings library.
- Participants can no longer access the meeting room.
- Reports for the meeting are no longer available.
- The uploaded content and recordings associated with a meeting room are removed from the Meetings library.

To delete a meeting:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the meeting that you want to delete; for more information, see “Navigating the Meetings library” on page 145.
3. Click the check box to the left of the meeting that you want to delete.
4. Click the Delete button on the menu bar above the meeting list.
   A confirmation page appears.
5. Click the Delete button on the confirmation page to permanently delete the selected meeting.
   The Meetings List page appears without the meeting you deleted.
Moving uploaded content to the Content library

To move uploaded content to the Content library, you must be an administrator or a user with permissions to manage the specific Meetings library folder that contains this meeting.

For a description of uploaded content and an explanation of the benefits of moving it to the Content library, see "About moving meeting contents to the Content library" on page 147.

To move uploaded content:

1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the meeting that has uploaded content you want to manipulate; for more information, see "Navigating the Meetings library" on page 145.
3. Click the name of the meeting in the meeting list to open it.
   The Meeting Information page appears.
4. Click the Uploaded Content link on the navigation bar.
   The Uploaded Content page appears.
5. Click the check box to the left of each file that you want to move.
6. Click the Move To Folder button on the navigation bar.
   A new window appears, listing the items that you selected and letting you specify their new folder location in the Content library.
7. Navigate to the folder location in the Content library where you want to move the content file by clicking the folder titles or the Up One Level button.
   As you navigate to the new location, the new destination appears in the upper right of the Breeze Manager window.
8. Click Move.
   The Move Successful page appears, confirming that the move was successful.
9. Click OK.

Deleting uploaded content

You can delete uploaded content that is associated with a meeting in a Meetings library folder if you are an administrator or a user with permissions to manage the specific Meetings library folder in question. When you delete uploaded content, you are deleting it from the Meetings library, unless you have previously moved the content to the Content library. In this case, although the content has been removed from the meeting (that is, the Meetings library), it is still available from the Content library. To delete uploaded content that you moved to the Content library, see "Deleting a content file or folder" on page 46.

To delete uploaded content:

1. Click the Meetings tab at the top of the Breeze Manager window.
2. Go to the meeting that contains the uploaded content that you want to delete; for more information, see "Navigating the Meetings library" on page 145.
3. Click the name of the meeting in the meeting list to open it.
   The Meeting Information page appears.
4. Click the Uploaded Content link on the navigation bar.
   The Uploaded Content page appears with a list of content files for this meeting.
5. Click the check box to the left of each file that you want to delete.
6. Click the Delete button above the list.
   A confirmation page appears.
7. Click the Delete button on the confirmation page to permanently delete the selected content.
   The Uploaded Content page appears with an updated content list.

**Moving meeting recordings to the Content library**

You can move meeting recordings that are associated with a meeting in a Meetings library folder to the Content library if you are an administrator or a user with permissions to manage the specific Meetings library folder in question. For a description of meeting recordings and the purpose of moving them to the Content library, see “About moving meeting contents to the Content library” on page 147.

**To move a meeting room recording:**

1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the meeting that has recordings you want to move; for more information, see “Navigating the Meetings library” on page 145.
3. Click the name of the meeting in the meeting list to open it.
   The Meeting Information page appears.
4. Click the Recordings link on the navigation bar.
   The Recordings page appears.
5. Click the check box to the left of any recording that you want to move.
6. Click the Move button on the navigation bar.
   A new window appears, listing the items that you selected and letting you specify their new folder location in the Content library.
7. Navigate to the folder location in the Content library where you want to move the recording by clicking the folder titles or the Up One Level button.
   As you navigate to the new location, the new destination appears in the upper right of the Breeze Manager window.
8. Click Move.
   The Recordings page appears with an updated recording list.
Deleting a meeting recording

You can delete a meeting recording associated with a meeting in the folder if you are an administrator or a user with permissions to manage the specific Meetings library folder in question. When you do so, you are deleting it from the Meetings library unless you moved the recording to the Content library. To delete a meeting recording that you moved to the Content library, see “Deleting a content file or folder” on page 46.

To delete a meeting room recording:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the meeting whose recording you want to delete; for more information, see “Navigating the Meetings library” on page 145.
3. Select the name of the meeting in the meeting list to open it.
   The Meeting Information page appears.
4. Click the Recordings link on the navigation bar.
   The Recordings page appears with a list of recordings for this meeting.
5. Click the check box to the left of any recording you want to delete.
6. Click the Delete button above the list.
   A confirmation page appears.
7. Click Delete on the confirmation page to permanently delete the selected recordings.
   The Recordings page appears with an updated recording list.

Managing meeting folders

Administrators and users with permission to manage a specific Meetings library folder can organize the Meetings library by performing the following tasks for a specific folder:

You can manage meeting folders by doing the following:

- “Creating a meeting folder” on page 152
- “Moving a meeting folder” on page 152
- “Deleting a meeting folder” on page 153
- “Changing a meeting folder’s name and description” on page 153
- “Setting meeting folder permissions” on page 154
- “Modifying the permission access list” on page 155
Creating a meeting folder

Administrators and users with permission to manage a specific Meetings library folder can create folders and subfolders within it.

After you create the folder, you can move meetings into it; see “Moving a meeting to a folder” on page 148.

To create a meeting folder:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the location where you want to add the new folder; for more information, see “Navigating the Meetings library” on page 145.
3. Click the New Folder button on the menu bar above the meeting list.
4. Enter the name of the new folder on the new page that appears.
5. Click Save.

Moving a meeting folder

Administrators and users with permission to manage a specific Meetings library folder can move the location of the meeting folder in question. When you move a meeting folder, all the meetings within the folder also move to the new location.

To move a meeting folder:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the location of the meeting folder you want to move; for more information, see “Navigating the Meetings library” on page 145.
3. Click the check box to the left of any folder that you want to move.
4. Click the Move button on the menu bar above the meeting list.
   A new window appears, listing the items you selected and letting you specify their new folder location.
5. Click the folder titles or the Up One Level button to navigate to the folder location where you want to place the meetings.
   As you navigate to the new location, the new destination location appears in the upper right of the Breeze Manager window.
6. Click Move.
   The Move Successful page appears, confirming that the move was successful.
7. Click OK.
Deleting a meeting folder

To delete a meeting folder, you must be an administrator or a user with permissions to manage the specific meeting folder in question.

When a meeting folder is deleted, the following occurs:

- The meeting folder and all items in the folder and its subdirectories are permanently deleted; this means that this information cannot be retrieved.
- Participants cannot access the deleted meetings.
- Reports for the deleted meetings are not available.
- The uploaded content and recordings associated with a meeting are removed from the Meetings library.

To delete a meeting folder:

1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the folders that you want to delete; for more information, see “Navigating the Meetings library” on page 145.
3. Click the check box to the left of any folder that you want to delete.
4. Click the Delete button on the menu bar above the meeting list.
   A confirmation page appears.
5. Click Delete on the confirmation page to permanently delete the selected folder.
   The Meetings List page appears without the name of the folder that you deleted.

Changing a meeting folder’s name and description

To change a meeting folder name and description, you must be an administrator or a user with permissions to manage the specific meeting folder in question.

To create a meeting folder:

1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the location of the folder whose name and description you want to change; for more information, see “Navigating the Meetings library” on page 145.
3. Click the Edit Information link above the meeting list.
   The Edit Information page appears.
4. Click the folder name to open it.
   The folder name appears in the navigation trail and the list of files in this folder appears.
5. Enter the new name for this folder in the Title text input box, and, if desired, a description in the Summary text input box.
6. Click Save.
   The Meeting List page reappears with the new folder name in the navigation trail.
Setting meeting folder permissions

By default, when you create a meeting folder in the Meetings library (see “Creating a meeting folder” on page 152), the folder permissions are set the same as parent folder. In contrast to the permissions rules for the Content library, you cannot set permissions for a meeting within a given folder that are different from the parent folder. Meeting permissions thus apply to all meetings within a folder. However, administrators and users with permissions to manage a specific Meetings library folder can edit a meeting permissions profile at the folder level.

When you set folder permissions, you control which users and groups can manage this folder in the library. To set access permissions (that is, meeting roles) for a specific meeting once the meeting has been created, see “Changing the meeting participant list” on page 138.

When customizing the permission settings for a meeting folder, you can select either of the following options:

Create a custom permissions profile for users and groups  Add users or groups to the profile and set the access for each user or group to Denied or Manage. User or group permissions that you set for the folder take precedence over permissions that are set for the parent folder.

Reset to Parent  If a custom permissions profile has already been created for a meeting folder, you can reset it to the permissions profile of its parent folder.

You must first open the folder before you can change its permissions.

To set permissions for a meeting folder:

1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the meeting folder whose permissions you want to set; for more information, see “Navigating the Meetings library” on page 145.
3. Click the check box to the left of the meeting folder.
4. Click the Set Permissions button on the navigation bar. One of the following pages appears:
   - If this folder has never been customized, the customize page appears with the message “Current Setting: same as parent folder.”
     To maintain the same setting, click OK to return to the meetings and folders listing page.
     To customize the permissions, proceed to step 5.
   - If this folder has already been customized, the Set Permissions page appears with the Available Users and Groups list on the left and the Current Permissions list on the right.
     To modify this list, go to step 6.
     To reset to the permissions to those of the parent folder, click the Reset To Parent button above the Available Users and Groups list.
5. Click the Customize button.

The Set Permissions page appears with the Available Users and Group list on the left and the Current Permissions list on the right.
6. Create a custom profile for this folder or modify the existing profile as follows:
   ■ Press Control-click or Shift-click, as appropriate, to select multiple users or groups.
   ■ To expand a group so you can select individual members, double-click the group name. When you are done with this group, double-click Up One Level in the list to return to the parent folder list.
   ■ To search for a name in the list, click the Search button at the bottom of the window, enter the name to display it in the list, and then select it.
   
7. Click the Add button.
   
   The users and/or groups that you added appear in the Current Permissions window. To remove a name from this window, select it and click Remove.
   
8. Assign permissions for each user and group in the Current Permissions window, as follows:
   a Select a name in the list:
      Press Control-click or Shift-click, as appropriate, to select multiple users or groups.
      To search for a name, click the Search button at the bottom of the window, enter the name to display it in the list, and then select it.
   b For each selected name, click the Permissions button at the bottom of the window.
      A pop-up menu appears.
   c Click the permission appropriate for the selected name.

Modifying the permission access list

You can change the permission access list for a meeting folder by adding or removing users or groups from the list. Doing this lets you control exactly who has access to your file and the type of access.

To add a user or group to the permission access list:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the meeting folder whose permissions you want to set; for more information, see “Navigating the Meetings library” on page 145.
3. Click the check box to the left of the meeting folder.
4. Click the Set Permissions button on the navigation bar. One of the following pages appears:
   ■ If this folder has never been customized, the customize page appears with the message “Current Setting: same as parent folder.”
      To add users or groups, go to step 5.
   ■ If this folder has already been customized, the Set Permissions page appears with the Available Users and Groups list on the left and the Current Permissions list on the right.
      To add users or groups, go to step 6.
5. Click the Customize button.

The Set Permissions page appears with the Available Users and Group list on the left and the Current Permissions list on the right.

6. To add users or groups, in the Available Users and Groups list, do the following:
   a. Press Control-click or Shift-click, as appropriate, to select multiple users or groups.
   b. To expand a group so that you can select individual members, double-click the group name. When you are done with this group, double-click the Up One Level icon in the list to return to the parent folder list.
   c. To search for a name in the list, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.

7. Click the Add button.

The users and/or groups that you added appear in the Current Permissions window. To remove a name from this window, select it and click Remove.

8. Assign permissions for each user and group in the Current Permissions window as follows:
   a. Select a name in the list:
      Press Control-click or Shift-click, as appropriate to select multiple users or groups.
      To search for a name, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.
   b. For each selected name, click the Permissions button at the bottom of the window.
      A pop-up permissions menu appears.
   c. Click the permissions appropriate for the selected names.

To remove a user or group from the permission access list:
1. Click the Meetings tab at the top of the Breeze Manager window.
2. Navigate to the meeting folder whose permissions you want to set; for more information, see “Navigating the Meetings library” on page 145.
3. Click the check box to the left of the meeting folder.
4. Click the Set Permissions button on the navigation bar. One of the following pages appears:
   a. If this folder has already been customized, the Set Permissions page appears with the Available Users and Groups list on the left and the Current Permissions list on the right.
      To delete users or groups, go to step 6.
   b. If this folder has never been customized, the customize page appears with the message “Current Setting: same as parent folder.”
      To delete users or groups, go to step 5.
5. Click the Customize button.

The Set Permissions page appears with the Available Users and Group list on the left and the Current Permissions list on the right.
6. To delete users or groups, do the following in the Current Permissions list:
   - Press Control-click or Shift-click, as appropriate, to select multiple users or groups
   - To search for a name in the list, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.

7. Click the Remove button.
   The users and/or groups you removed disappear from the Current Permissions window.
A Macromedia Breeze seminar is a special kind of Macromedia Breeze Meeting. Like a Breeze meeting, it’s conducted online in real-time and provides a virtual room in which a presenter can show slides or multimedia presentations, share screens, chat, and broadcast live audio and video.

Like a Breeze meeting, a Breeze seminar takes place in a meeting room, a Macromedia Flash application that you run in a browser window by using Macromedia Flash Player. As with meetings, you create a seminar in Breeze Manager.

Seminars differ from meetings in keys ways. A meeting normally has 10 people or fewer and can be recurring. A seminar might have different limits for the number of users or the number of meetings that happen at the same time. (A user can click the information link to see what those limits are.) The default seminar room looks different than the default meeting room. Also, seminars can only be created in a shared area, while meetings can either be created in a shared area or a user folder.

You could consider holding a seminar in the following situations:

• You are hosting at least 50 participants.
• The seminar is a one-time or infrequent event.
• The meeting is noncollaborative, with very little audience participation or interaction.

Because of these differences, seminars have different templates than meetings, and a different licensing and pricing structure. These differences are also reflected in the structure of the Seminar library; for details, see Chapter 13, “Managing the Seminar Library,” on page 181.

About licensing for meetings and seminars

Although a seminar is similar to a meeting, the seminar feature is purchased separately. After purchasing the feature, a new Seminar tab is displayed in Breeze. If you have purchased both the Meetings application and the Seminars application, you cannot create a meeting from the Seminar Rooms tab or a seminar from Meetings tab. The pricing and licensing models for seminars and meetings are different.
Accessing the Seminar library

The Seminar library is where seminar files and folders are stored. Breeze users who have the correct permissions can manage and organize files and folders in the Seminar library. You reach the Seminar library through the Seminar Rooms tab. When you click the Seminar Rooms tab, the Seminar List page displays the contents of the Shared Seminars folder. Depending on your permissions, you can create these seminars or modify them. For more information, see “About the Seminar library” on page 181.

The seminars you are scheduled to attend appear on the Home tab of your Breeze Manager application, not the Seminar Rooms tab. For details, see Chapter 1, “Understanding the Workspace,” on page 15.

About seminar terminology and attributes

Before you can attend a seminar, or create and manage seminars, you should become familiar with the following terminology and characteristics of Breeze seminars:

- “Seminar versus meeting room” on page 160
- “Seminar roles” on page 160

Seminar versus meeting room

Macromedia Breeze Manager is unique among web meeting applications because you use it not only to schedule online seminars at particular times, but also to create meeting rooms. You create a virtual meeting room before a seminar starts and, just as a physical meeting room exists, the virtual meeting room continues to exist after a seminar ends.

A seminar is a gathering of people and resources in a particular place on a particular day between certain start and end times. The seminar itself exists only for that period of time.

A meeting room exists before, during, and after the seminar. The meeting room location is a URL, assigned by the system when the seminar is created. When you click the URL, you start the Flash application in your browser. Then you enter a virtual meeting room that Flash constructs for you; here, you can perform online all those activities that you would do in a physical meeting room. Depending on the permissions that the host has assigned to the seminar, attendees can visit the meeting room after the seminar to view content or follow up on action items, and so on.

Seminar roles

When hosts create a seminar, they can add Breeze users to its list of attendees and specify each attendee's role for the seminar as one of the following:

- Presenter A presenter can screen share, chat, broadcast live audio and video, customize the meeting room layout, and show content to the participants. The content can be Breeze presentations, slides (PPT files), Flash files and Captivate simulations (SWF files), Flash Video files (FLV files), images (JPEG files), and web pages (HTML files).

- Participant A participant can view the content that the presenter is showing or sharing, and hear and see the presenter's audio and video broadcast.
**Host**  A host sets up the meeting, invites the guests, chooses the content, and assigns both presenter and participant roles to the appropriate attendees. The host can also perform all the tasks that presenters can perform.

For procedures on setting permissions for seminar attendees, see Chapter 12, “Working with Seminars,” on page 165.

For more information on participating and presenting in Breeze seminars, see *Breeze Meeting User Guide for Participants* or *Breeze Meeting User Guide for Hosts and Presenters*.

**Types of seminar participants**

There are two types of access within the participant category for Breeze seminars:

**Registered Breeze users and accepted guests only**  Accessible to users who share the same Breeze account with the seminar host. *Registered* here means a valid Breeze account; it does not refer to the registration process that applies to an event (see “Registration and approval” on page 161).

Invitees who share the same Breeze account as the host see the seminar listed under My Scheduled Meetings on the Home tab after they log in to Breeze Manager. (If the seminar has been scheduled as an event, it is listed under My Scheduled Events.) In addition, if this user also has Microsoft Outlook and has received and accepted an invitation for this seminar, the seminar is automatically scheduled in their Outlook calendar and they can join from Outlook.

*Accepted guests* are those who are accepted into the room by a host.

**Anyone**  Accessible to anyone who receives the meeting URL.

**Registration and approval**

Depending on the type and purpose of a given seminar, the seminar host might want to have the guests register. If so, the host must have the Event Management tab as part of the Breeze Manager application, because registration for any meeting, training, presentation, or seminar can only be done through the Event Management tab. If the host has this tab, they must first create the seminar from the Seminar Rooms tab using the Seminar wizard. (For more information, see Chapter 12, “Working with Seminars,” on page 165). Then, they create an event and select the seminar they have created as the event. (For more information, see Chapter 14, “About Events,” on page 195. If the seminar is presented as an event, all guests, regardless of whether they have a Breeze account or whether the URL is public, must provide registration information prior to the seminar.
About permissions

There are two different aspects of permissions to consider when working with seminars:

- **Attendance permissions** These permissions define attendee roles in a seminar, such as participant, presenter, and host. For more information, see “Seminar roles” on page 160.

  You assign these permissions when you create a seminar. However, the seminar host can also modify them during the seminar, and after the seminar is over by editing the participant list. For more information, see “Creating a seminar” on page 167.

- **Seminar library permissions** These permissions define who can perform the different tasks associated with the Seminar library files and folders, such as adding and deleting files or searching the library archives. The groups that a user belongs to, and the individual permissions that are assigned to a user for specific files and folders, determine a user’s ability to create, delete, and edit seminars in various folders within the Seminar library. For more information, see “Seminar library permissions and permission types” on page 162. For more information about the Seminar library management tasks, see Chapter 13, “Managing the Seminar Library,” on page 181.

Seminar permissions for built-in groups

Breeze recognizes six default permission groups called “built-in groups.” You cannot change the permissions for these groups, but you can extend the permissions by assigning individuals or groups to more than one built-in group.

The following table shows the features that are accessible to each built-in group; for an explanation of the Shared Seminar folder, see “About the Seminar library” on page 181.

<table>
<thead>
<tr>
<th>Group</th>
<th>Shared Seminar folder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrators</td>
<td>Manage</td>
</tr>
<tr>
<td>Authors</td>
<td>None</td>
</tr>
<tr>
<td>Training Managers</td>
<td>None</td>
</tr>
<tr>
<td>Meeting Hosts</td>
<td>None</td>
</tr>
<tr>
<td>Seminar Hosts</td>
<td>None</td>
</tr>
<tr>
<td>Event Managers</td>
<td>None</td>
</tr>
</tbody>
</table>

Seminar library permissions and permission types

Seminar library permissions control which folders a user can access. Two permission types exist for the Seminar library: Manage and Denied. (There are no Publish or View permission types as there are for the Content library.) Manage and Denied are types associated with library folders.

**Note:** Seminar role permissions, such as participant, presenter, and host are assigned when you create a seminar. If the role permissions are changed after the seminar, the change must be done at the file level.
To manage a seminar folder in the Seminar library, you must have Manage permissions for that folder. To edit a seminar or change the participants list for a seminar, you must have Manage permissions and be the seminar host (that is, the person who created the seminar).

**Seminar room templates**

When you create a seminar, you select a default template for your seminar meeting room. This is a layout that you can change from within the meeting room itself. For information, see *Breeze Meeting User Guide for Hosts and Presenters*.

**Seminar tasks**

The following table explains the different tasks associated with seminars and directs you to the appropriate procedure in this guide for performing the task:

<table>
<thead>
<tr>
<th>Task</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Join a Breeze seminar from Breeze Manager that you are scheduled to attend.</td>
<td>“Joining a seminar” on page 166</td>
</tr>
<tr>
<td>Open a folder and move up and down through folder levels.</td>
<td>“Navigating the Seminar library” on page 182</td>
</tr>
<tr>
<td>View a brief profile of the seminar and meeting room, including name, description, time, and URL.</td>
<td>“Viewing seminar information” on page 171</td>
</tr>
<tr>
<td>View a list of seminar attendees.</td>
<td>“Viewing a participants list” on page 172</td>
</tr>
<tr>
<td>Use the Seminar wizard to perform all the steps necessary to set up a new seminar.</td>
<td>“Creating a seminar” on page 167</td>
</tr>
<tr>
<td>Move a seminar to a different seminar folder.</td>
<td>“Moving a seminar to a folder” on page 186</td>
</tr>
<tr>
<td>Delete seminars, including the meeting room, the contents, and recordings.</td>
<td>“Editing a seminar profile” on page 174</td>
</tr>
<tr>
<td>Change the seminar summary details for a seminar (must also be the seminar host).</td>
<td>“Changing the seminar participants list” on page 175</td>
</tr>
<tr>
<td>Add or remove participants, or change an attendee’s role (for example, from participant to presenter); must also be the seminar host.</td>
<td>“Changing the seminar participants list” on page 175</td>
</tr>
<tr>
<td>Generate e-mails with seminar details to all attendees.</td>
<td>“Sending seminar invitations” on page 177</td>
</tr>
<tr>
<td>Move content uploaded from a meeting room to a specified Content library folder.</td>
<td>“Moving uploaded content to the Content library” on page 187</td>
</tr>
<tr>
<td>Delete uploaded content associated with a specific meeting.</td>
<td>“Deleting uploaded content” on page 187</td>
</tr>
<tr>
<td>Move recordings from a meeting room to the Content library.</td>
<td>“Moving seminar recordings to the Content library” on page 188</td>
</tr>
<tr>
<td>Delete recordings associated with a specific seminar.</td>
<td>“Deleting a seminar recording” on page 189</td>
</tr>
<tr>
<td>Add a new meeting folder to a specific Seminar library folder.</td>
<td>“Creating a seminar folder” on page 189</td>
</tr>
<tr>
<td>Task</td>
<td>See</td>
</tr>
<tr>
<td>---------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Move a seminar folder to a different location within the Seminar library.</td>
<td>“Moving a seminar folder” on page 190</td>
</tr>
<tr>
<td>Delete seminar folders within the Seminar library.</td>
<td>“Deleting a seminar folder” on page 190</td>
</tr>
<tr>
<td>Assign permissions to a seminar folder.</td>
<td>“Setting seminar folder permissions” on page 191</td>
</tr>
<tr>
<td>View aggregate statistical information about all your seminars using graphs in Breeze Manager.</td>
<td>“Viewing the Dashboard” on page 179</td>
</tr>
<tr>
<td>View various kinds of information about a specific seminar and create filters to define report parameters.</td>
<td>“Viewing the Dashboard” on page 179</td>
</tr>
</tbody>
</table>
A seminar is a special type of Macromedia Breeze meeting. Unlike a meeting, however, a seminar has a minimum of 50 participants and is normally held as a one-time or infrequent event. A seminar cannot be recurring, like a meeting. In addition, there are differences in the library structure that reflect the differences between the pricing and licensing of meetings and seminars. For more information, see Chapter 11, “About Seminars,” on page 159.

You can use Breeze Manager for all activities relating to Macromedia Breeze seminars, except conducting a live seminar. From the Manager, you can perform the following activities:

• Obtain information. For more information, see “Obtaining information about a seminar” on page 166
• Join a seminar as a participant. For more information, see “Joining a seminar” on page 166
• Create a seminar, which involves setting up your seminar room and inviting guests. For more information, see “Creating a seminar” on page 167.
• Create and review seminar reports. For more information, see “Seminar reports” on page 179
• Manage the files in the Seminar library, if you have the proper permissions. For more information, see Chapter 13, “Managing the Seminar Library,” on page 181

This chapter explains how to perform the activities necessary for a specific seminar, such as viewing seminar information, joining a seminar, and creating a seminar. It also gives procedures for sending invitations and for editing specific attributes of an existing seminar.

For information on participating and presenting in Breeze seminars, see Breeze Meeting User Guide for Participants or Breeze Meeting User Guide for Hosts and Presenters.
Obtaining information about a seminar

If you are scheduled for a Breeze seminar, the seminar appears on your Home tab under My Scheduled Meetings. You can obtain information about a seminar by clicking on the seminar name in the My Scheduled Meetings list. If you have more scheduled seminars than can appear on the Home tab, click the More button after the list to view the additional seminars.

**To access the Seminar Information page:**
- Select the seminar name under My Scheduled Meetings on the Home tab.

The Seminar Information page appears with the following details:

- **Name**  
  The seminar title
- **Summary**  
  A brief description of the seminar.
- **Start time**  
  The date and time the seminar begins.
- **Duration**  
  The projected length of time of the seminar.
- **URL**  
  The web address where the seminar is to occur; the seminar room’s virtual location.
- **Status**  
  The current state of the seminar; for example, whether the seminar is in progress or whether there are any participants in the room.
- **Language**  
  The language in which the seminar will be conducted.
- **Telephony information**  
  The telephone number for participants who call in to this seminar and the code that they must enter when the seminar is in progress.

You can click Enter Meeting Room to join the seminar.

Joining a seminar

If you are scheduled to attend a Breeze seminar, the seminar name appears in the My Scheduled Meetings list on the Home tab in the Breeze Manager window. In addition, if you have Outlook and have accepted the invitation to the seminar, the seminar appears on your Outlook calendar.

The seminar may or may not be a live seminar that is in progress when you join; you can determine if the seminar is occurring by the date and time shown for the seminar. If the date is in the past, it appears on your meeting list under expired meetings, but you can still enter the room to view content.

Participants in a Breeze seminar may or may not have Breeze accounts. Participant status depends on parameters set by the seminar host when the seminar is created. For example, the seminar might be public, and possibly not even live; alternatively, it might require registration and preapproval. For details about the different types of guests that can participate in seminars, see “Types of seminar participants” on page 161 and “Registration and approval” on page 161.

**To enter a scheduled seminar:**

1. Click My Scheduled Meetings.
2. Click Enter.

A browser window opens, loads, and then displays the meeting room for this seminar. For instructions on participating in a seminar, see *Breeze Meeting User Guide for Participants.*
Creating a seminar

You create seminars using the Meeting wizard. Use this wizard following the procedure below to create a seminar that does not require registration.

Also, when you create a seminar, you select an existing meeting room template that provides you with a design layout you can use or customize. (You customize the seminar meeting room from the within the room itself.) For more information, see Breeze Meeting User Guide for Hosts and Presenters.

Note: To create a seminar that requires participant registration, you must have purchased the Events application. If you have the Events tab and want to create a seminar requiring registration, see “Creating an event” on page 201. (When selecting content for the event, select the Present a Breeze Seminar option.)

Note: Before trying to create a seminar, check with your system administrator to ensure that you have the correct permissions to create a seminar.

To open the Seminar wizard:

1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the folder where you want to add a new seminar.
3. Click the New Seminar button.

The Meeting wizard starts and displays the Enter Meeting Information page. You are now ready to define some basic parameters for the seminar. For more information, see “Entering seminar information” on page 167.

Entering seminar information

The first step in the Seminar wizard is to enter seminar information. You can edit this information any time after you create the seminar. For more information, see “Editing a seminar profile” on page 174.

Name  A required field that appears in the meeting list and reports.

Custom URL  An optional field that lets you recreate a personalized URL for this seminar that is reusable and easy to remember. If you do not enter one, the system automatically generates a URL for you. For information you must know before using a custom URL, see “Custom URLs” on page 24.

Summary  A description that appears on the Information page. A seminar summary can have a maximum of 750 characters.

Start Time  The month, day, year, and time that the seminar starts.

Duration  The approximate time (in hours and minutes) that the seminar will last.

Select Template  The layout of the seminar room; select from the pop-up menu. Breeze offers default templates that you can modify to accommodate the purpose of the seminar. For a description of templates and how to work with them, see “Meeting room templates” on page 123.
Access  There are two options:

**Only Registered Users and Accepted Guests May Enter the Room**  Individuals who share the same Breeze account with the seminar host. In this case, registered means having a valid Breeze account; it does not refer to the registration process that applies to an event. Registered Breeze users must enter their Breeze user name and password to enter the seminar room, and Breeze can generate an individual attendance report for the seminar.

An accepted guest is someone who has been accepted into the room by the host and, although this person's attendance is added to the total number of attendees on reports, no individual attendance report is available.

**Anyone Who Has the URL for the Meeting Can Enter the Room**  Anyone who has the URL for the seminar can enter the room. In this case, no attendance report is available.

For more information, see “Types of meeting participants” on page 121:

**Do Not Include Any Audio Conference with This Meeting**  Select this option if no one will call in to the seminar.

**Include Audio Conference Details with This Meeting**  Audio conference users can select this option to include the following telephony information:

- **Conference number** is the telephone number for attendees who call in to the seminar. This information is included in the e-mail seminar invitation for attendees.

- **Moderator Code** is the code that identifies the seminar host to the telephone-conferencing system. This code does not appear on the e-mail invitations, but the seminar host sees it when logging in to the web application.

- **Participant Code** is the code that identifies the participant to the telephone-conferencing system. This code appears on the e-mail invitation with the conference telephone number.

To enter seminar information:

1. Enter a seminar name on the Enter Meeting Information page.
2. If appropriate, enter a custom URL.
3. Enter a summary.
4. Select the month, day, year, and time for the seminar start date.
5. Select the duration of the seminar (hours and minutes).
6. Select a template for this seminar from the pop-up menu.
7. Select the appropriate Access option to designate who can attend the seminar.
8. Select the appropriate Audio Conference Setting option. (If you are adding audio conferencing, type in a conference phone number, a moderator code, and a participant code so seminar attendees can call in to the seminar.)
9. Do one of the following:
   - Click the Next button to go to the second step in the wizard and select participants. For more information, see “Selecting participants” on page 169.
   - Click the Finish button to end the Meeting wizard without selecting participants or sending seminar invitations at this time.
Selecting participants

If you limited your seminar to invited guests only, the next step is to select the seminar participants. If you are creating a seminar that anyone can attend if they have the URL, see “Sending invitations” on page 170.

For a Registered Users and Accepted Guests Only seminar, you can select users and groups to be participants or presenters in your seminar. These are the only Breeze users who can be assured they can log in to the seminar. Uninvited users who have the URL to the seminar meeting room can attempt to log in as guests. In this case, as a host, you can grant admission to guests on an individual basis.

You can also change the seminar participants or presenter any time after you create the seminar. For more information, see “Changing the seminar participants list” on page 175.

To select meeting participants:
1. In the Available Users and Groups list, do one of the following to select the users and groups that you want to invite to this seminar:
   - Press Control-click or Shift-click to select multiple users or groups.
   - To expand a group to select any individual members, double-click the group name; when you are done with selection, double-click Up One Level in the list to restore the original list.
   - To search for a name in the list, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.
2. Click the Add button.
   The users and groups that you added appear in the Current Participants list; to remove a name from this list, select it and click Remove.
3. Do the following to assign attendee role permissions to the participants:
   a Select the name from the Current Participants list.
   b Click the Permissions button at the bottom of the Current Participants list.
   c Click the appropriate permission for this name (participant, presenter, or host); for information on seminar attendee roles, see “Seminar roles” on page 160.
4. Do either of the following:
   - To send invitations, click the Next button. If you selected Registered Users and Accepted Guests Only, the Send Invitations page appears with multiple options and a default message for your invitation. If you have selected Anyone, the Send Invitations page appears with the URL and the Send E-mail Invitations buttons. See “Sending invitations” on page 170.
   - To stop the wizard without sending invitations at this time, click Finish. (To send invitations at a later date, see “Sending seminar invitations” on page 177.)
Sending invitations

The final step in the Meeting wizard is to send seminar invitations. A seminar invitation is an e-mail invitation sent to participants informing them about the seminar date, time, duration, and location. The invitation process differs depending on the type of seminar you are creating:

**Registered Breeze users only and accepted guests** Individuals who share the same Breeze account with the seminar host. In this case, *registered* means having a valid Breeze account; it does not refer to the registration process that applies to an event (see “Meeting registration” on page 121). Registered Breeze users must enter their Breeze user name and password to enter the seminar room, and Breeze can generate an individual attendance report for the seminar. If you selected this option, you can select which group of attendees you want to send an invitation to (all presenters and participants, presenters only, or participants only) and modify the default message subject and text as appropriate. Breeze automatically sends the invitation to the appropriate groups. You can also attach a Microsoft Outlook calendar invitation so that participants can add the Breeze meeting to their calendars.

An accepted guest is someone who has been accepted into the room by the host and, although this person’s attendance is added to the total number of seminar attendees on reports, no individual attendance report is available.

**Anyone** The Anyone option lets anyone who has the URL for the seminar enter the room. Click the Send E-mail Invitations button to create an e-mail invitation in your own e-mail application. The new message contains a prepopulated subject (the name of your seminar) and a prepopulated message (containing the seminar date, time, duration, location, and summary). You can edit the subject and the message as necessary.

You can also send seminar invitations any time after the seminar is created. For more information, see “Sending seminar invitations” on page 177.

**To send invitations for a Registered Breeze Users Only meeting:**
1. On the Send Invitation page, select the Send Invitations option.
2. Select the group to whom you want to send the invitation in the To pop-up menu: all hosts, presenters, and participants, hosts only, presenters only, or participants only.
3. Edit the subject and the message body as appropriate.
4. Do one of the following:
   - To let participants add the seminar to their Outlook calendars, leave the Yes check box selected next to Attach Microsoft Outlook Calendar Event (vCal) to E-mail Message.
   - To refrain from including an Outlook invitation, clear the Yes check box.
5. Click the Finish button.

The Meeting Information page appears.
To send invitations for a meeting open to anyone:
1. On the Meetings Information page, click the Send Email Invitations button. A new message open in your e-mail application.
2. Select the users to whom you want to send the invitation from your address book or enter their e-mail addresses manually in the To text box.
3. Edit the e-mail subject and message, if necessary.
4. Click Send.
5. Return to Breeze Manager, and click the Finish button.
The Meeting Information page appears.

Working with existing seminars

To view or modify an existing seminar, you must have both of the following permission types:

File management permissions  You must have Manage permissions for the seminar folder or file, because when you make any change to a seminar that you created, you are effectively changing the file or folder in the Seminar library.

Attendance permissions  You must be the host for the seminar, because you are also changing the parameters of the seminar itself.

For more information about permissions, see “About permissions” on page 162.

Viewing seminar information

You can view different kinds of information about a seminar from within the Breeze Manager application, including a profile that describes the seminar, a participant list, and a list of the seminar content.

Viewing a seminar profile

There are two ways of viewing a seminar profile:

• Access the information from the Home tab. For more information, see “Obtaining information about a seminar” on page 166.
• Navigate to the seminar from the Seminar Rooms tab using the procedure below.
To view a seminar profile from the Seminar Rooms tab:
1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the seminar for which you want to get information.
3. Select the name of the seminar from the seminar list.

The Seminar Information page appears.

Viewing a participants list

If you have Manage permissions for a particular seminar, you can view a list of all invited participants for each seminar room.

*Note:* If this seminar is presented as an event, you must view the information in the Event Management tab. For information, see Chapter 15, “Working with Events.”

To view a seminar participants list:
1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the seminar for which you want to get information.
3. Select the seminar name in the list.
4. Click the Edit Participants link.

The names of invited participants and groups appear. (To edit the list of participants, see “Changing the seminar participants list” on page 175.)
Viewing an uploaded content list

If you have Manage permissions for a seminar folder, you can view a list of all content that has been uploaded to the Breeze server from a seminar room within that folder.

To view a seminar uploaded content list:
1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the seminar for which you want to get information.
3. Select the seminar name from the list.
   The Seminar Information page appears.
4. Click the Uploaded Content link.
   A list of all uploaded content appears. From here, you can do any of the following:
   ■ To see the information about a specific item in the list, click on the item’s name, then go to step 5 below for further options.
   ■ To move this content to the Content library, see “Moving meeting recordings to the Content library” on page 150
   ■ To delete this content, see “Deleting uploaded content” on page 149.
5. Do either of the following:
   ■ To change the title or summary for the piece of uploaded content, click Edit, make your changes on the Edit page, and click Save.
   ■ To return to the uploaded content list, click Return To Uploaded Content.

Viewing a recordings list

If you are an administrator or have Manage permissions for a meeting folder, you can view a list of all seminar recordings that have been uploaded to the Breeze server from a seminar room within that folder.

To view a seminar recordings list:
1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the seminar for which you want to get information.
3. Select the seminar name in the list.
   The Seminar Information page appears.
4. Click the Recordings link.
   A list of all recordings for the seminar room appears. From here, you can do any of the following:
   ■ To see the information about a specific item in the list, click the item’s name, then go to step 5 for further options.
   ■ To move this content to the Content library, see “Moving meeting recordings to the Content library” on page 150
   ■ To delete this content, see “Deleting a meeting recording” on page 151.
5. To change the title or summary for specific recording, click Edit, make your changes on the Edit page, and click Save.
Editing a seminar profile

If you are an administrator or a host, you can modify seminar properties at any time after creating a seminar.

To edit a seminar’s information:

1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the seminar for which you want to get information.
3. Select the seminar name from the list.
   The Seminar Information page appears.
4. Click the Edit Information link.
   The Meeting Information page appears.
5. Edit the information.

   - **Name**: A required field that appears in the seminar list and in reports.
   - **Summary**: A seminar summary that appears on the seminar Information page and in seminar reports. A seminar summary can be as many as 750 characters in length.
   - **Start time**: The month, day, year, and time the seminar starts.
   - **Duration**: The hours and minutes that the seminar will last.
   - **Seminar Access**: The Only Registered Users and Accepted Guests option restricts users who can enter the room. The Anyone option lets anyone who has the URL for the seminar enter the room.
     - **Registered Breeze Users Only and Accepted Guests**: Individuals who share the same Breeze account with the meeting host. In this case, registered means having a valid Breeze account; it does not refer to the registration process that applies to an event (see “Meeting registration” on page 121). Registered Breeze users must enter their Breeze user name and password to enter the meeting room, and Breeze can generate an individual attendance report for the meeting. If you selected this option, you can select which group of attendees you want to send an invitation to (all presenters and participants, presenters only, or participants only) and modify the default message subject and text as appropriate. Breeze automatically sends the invitation to the appropriate groups.
     - **Anyone**: The Anyone option lets anyone who has the URL for the seminar enter the room. Click the Send E-mail Invitations button to create an e-mail invitation in your own e-mail application. The new message contains a prepopulated subject (Breeze Meeting Invitation) and a prepopulated message (containing the meeting date, time, duration, location, and summary) that you can edit. For more information, see “Changing the seminar participants list” on page 175:

   - **Note**: If you change the seminar start date to a future date, participants and presenters can still enter the seminar room at any time. When you are logged in to a seminar meeting room, you can stop participants from entering the room between seminars. For more information, see Breeze Meeting User Guide for Hosts and Presenters.
Audio Conference Settings  Whether there are audio conference settings necessary for this seminar, and if so, the telephone number, moderator code, and participant code for the guests who are calling in.

If you did not add audio conference settings when you initially created the meeting, and you want to add them while you are in the meeting itself, you can use the procedure below to create them in Breeze Manager, but in this case, you must first have all users log out of the meeting, add the telephony information, and wait 5 minutes. For more information, see the Breeze Manager User Guide for Hosts and Presenters.

6. Click the Save button.
   The Seminar Information page reappears with the new information.

Changing the seminar participants list

If you are an administrator or have Manage permissions for a seminar folder, you can add or remove participants and change participant permission settings (host, presenter or participant).

Participants who are removed from the seminar do not receive any notification; they simply cannot access the seminar unless the seminar’s access is changed to allow anyone who has the meeting URL to enter.

To add seminar participants:

1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the seminar for which you want to get information.
3. Select the seminar name in the list.
   The Seminar Information page appears.
4. Click the Edit Participants link.
   The Edit Participants page appears.
5. In the Available Users and Groups list, do one of the following to select the names of the users or groups you want to add for your seminar:
   - Press Control-click or Shift-click, as appropriate, to select multiple users or groups.
   - To expand a group to select any individual members, double-click the group name; when you are done with selection, double-click Up One Level in the list to restore the original list.
   - To search for a name in the list, click the Search button at the bottom of the window, enter the name to display it in the list, and then select it.
6. Click Add.
   The name(s) you selected appear in the Current Participants list.
7. For each new participant user or group that you added, select the appropriate permission type (participant, host, or presenter) from the Set User Role pop-up menu at the bottom of the Current Participants list.
8. Click a link in the navigation bar to perform another task or click Seminar Information to view details about the seminar.
To remove seminar participants:
1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the seminar for which you want to get information.
3. Select the seminar name from the list.
   The Seminar Information page appears.
4. Click the Edit Participants link.
   The Edit Participants page appears.
5. In the Current Participant list, do one of the following to select the groups or users you want to remove:
   ■ Press Control-click or Shift-click to select multiple users or groups.
   ■ To search for a name in the list, click the Search button at the bottom of the window, enter the name to display it in the list, and then select it.
6. Click the Remove button.
   The name no longer appears in the Current Participants list.
7. Click a link in the navigation bar to perform another task or click Seminar Information to view details about the seminar.

To change a participant’s seminar permission:
1. Click the Seminar rooms tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the seminar for which you want to get information.
3. Select the seminar name from the list.
   The Seminar Information page appears.
4. Click the Edit Participants link.
   The Edit Participants page appears.
5. Click the Edit Participants link.
   The Edit Participants page appears.
6. In the Current Participants list, do one of the following to select the users or groups whose seminar permissions you want to change:
   ■ Press Control-click or Shift-click to select multiple users or groups.
   ■ To search for a name in the list, click the Search button at the bottom of the window, enter the name to display it in the list, and then select it.
7. For each name, select the new user role (presenter, participant, or host) that you want to assign from the pop-up Set User Role menu at the bottom of the Current Participants list.
8. Click a link in the navigation bar to perform another task or click Seminar Information to view details about the seminar.
Sending seminar invitations

You can send invitations for a specific seminar if you are an administrator or have Manage permissions for this seminar's folder.

A seminar invitation is an e-mail invitation sent to seminar participants to tell them the seminar date, time, duration, and location. The method for sending invitations depends on the type of seminar:

Registered Breeze guests  If your seminar is for Breeze users only, you create a custom e-mail message from within Breeze Manager. You can send the e-mail invitation to all hosts, participants and presenters, presenters only, or participants only. You can customize the subject and message body. You can also attach a Microsoft Outlook calendar invitation so that participants can add the seminar to their calendars.

Anyone  If your seminar is open to anyone who receives the seminar URL, click the Send E-mail Invitations button to create an e-mail invitation in your own e-mail application. The new message contains a prepopulated subject (the name of the seminar) and a prepopulated message (containing the seminar date, time, duration, location, and summary) that you can edit.

To send invitations for a registered Breeze guest-only seminar:
1. Click the Seminar rooms tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the seminar for which you want to get information.
3. Select the seminar name from the list.
   The Seminar Information page appears.
4. Click the Invitations link.
   The Invitations page appears.
5. Select the group to which you want to send the invitation in the To pop-up menu: hosts, participants and presenters, presenters only, or participants only.
6. Edit the subject and the message body if appropriate.
7. To let participants add the seminar to their Outlook calendars, leave the Yes check box selected next to Attach Microsoft Outlook Calendar Event (vCal) to E-mail Message.
8. Click the Send button.

Registered Breeze users can be sent a seminar invitation directly from Breeze Manager.

**To send invitations for a seminar open to anyone:**

1. Click the Seminar Room tab at the top of the Breeze Manager window.
2. Navigate to the folder that contains the seminar for which you want to get information.
3. Select the seminar name from the list.
   - The Seminar Information page appears.
4. Click the Invitations link.
   - The Invitations page appears with the seminar details.
5. Do either of the following as appropriate:
   - Click the Send E-Mail Invitations button. A new blank message opens in your e-mail application.
   - Manually open a new, blank e-mail message in your e-mail application, then copy and paste in the meeting URL shown in the seminar’s details.
6. Type in the e-mail addresses of the people to whom you want to send the e-mail invitation or add them from your address book.
7. Edit the e-mail subject and message, if necessary.
8. Send the e-mail invitation.
   - The Meeting Information page appears.
Viewing the Dashboard

The Seminar Dashboard provides a graphical representation of statistical data about your seminars. To see the Dashboard, click the Seminar Dashboard link under the tab bar, at the top of the Seminar's window. The data, which reflects all the seminars you have created, appears in three bar graphs; clicking in any of these brings up the Summary Report for this seminar (see “Meeting reports” on page 142):

**Most Active Meetings Over Last 30 Days**  Determined by the number of sessions.

**Most Participants Meetings Over Last 30 Days**  Determined by the number of participants.

**Most Viewed Archives Over Last 30 Days**  Determined by the number of views (that is, the number of times each archived meeting has been viewed).

You can click on any individual seminar in any of the three bar graphs to view more detailed information about the seminar.

Seminar reports

The Reports feature of the Breeze Manager enables you to create reports that show you a given seminar from different perspectives. To create the reports, you open the Seminar Information page (see "Viewing a seminar profile" on page 171), and click the Reports link. For more information about reports, see "Meeting reports" on page 142.
CHAPTER 13
Managing the Seminar Library

This chapter explains the administrative tasks for maintaining the Seminars library. It describes
the library and provides procedures for the file and folder management activities that Breeze users
can perform within the library. The Breeze users who can manage files and folders in the library
are administrators or any other user who has Manage permissions for those files or folders. For a
list of the tasks that Breeze users can perform in the Seminar library, as well as links to the
procedures for each, see the table in “Seminar tasks” on page 163.

For information on how to work with seminars, including joining and creating seminars, as well
as viewing and changing information for a specific seminar, see Chapter 12, “Working with
Seminars,” on page 165. For background information on seminars, including Macromedia Breeze
seminar terminology and concepts, see Chapter 11, “About Seminars,” on page 159.

About the Seminar library

The Seminar library contains all Macromedia Breeze seminar meeting rooms organized in a single
high-level folder called Shared Seminars. You access the Seminar library by clicking the Seminar
Rooms tab at the top of the Breeze Manager window. As you navigate the seminar folders, the
names of the folders are displayed as a navigation links at the top of the browser window.

Shared Seminars folder

The Shared Seminars folder is accessible to users with Manage permissions. This usually means
administrators and seminar hosts. However, after you create a seminar, only certain people can
edit the seminar or change the seminar Participants List. These people include users with Manage
permissions for the seminar folder, who are also designated as hosts for the seminar, as well as
administrators. You can place seminar meeting rooms in the Shared Seminars folder that users
with Manage permissions can access and manipulate.
**Seminar library activities**

Within the Seminar library, you can perform the following tasks:

<table>
<thead>
<tr>
<th>Activities</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open a folder and move up and down through folder levels.</td>
<td>“Navigating the Seminar library” on page 182</td>
</tr>
<tr>
<td>Locate profile information and content for past seminars.</td>
<td>“Searching the Seminar library archives” on page 184</td>
</tr>
<tr>
<td>Change the seminar location.</td>
<td>“Moving a seminar to a folder” on page 186</td>
</tr>
<tr>
<td>Delete a seminar, including the seminar meeting room, its content, and recordings.</td>
<td>“Deleting a seminar” on page 186</td>
</tr>
<tr>
<td>Move content uploaded from a seminar meeting room to a specified Content library folder.</td>
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</tr>
<tr>
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</tr>
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<td>Move recordings from a seminar meeting room to the Content library.</td>
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<tr>
<td>Add a new seminar folder to a specific Seminar library folder.</td>
<td>“Creating a seminar folder” on page 189</td>
</tr>
<tr>
<td>Move a seminar folder to a different location within the Seminar library.</td>
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</tr>
<tr>
<td>Delete seminar folders in the Seminar library.</td>
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</tr>
<tr>
<td>Assign permissions to a seminar folder.</td>
<td>“Setting seminar folder permissions” on page 191</td>
</tr>
</tbody>
</table>

**Navigating the Seminar library**

You can perform the following tasks in the Seminar library:

- “Opening a folder” on page 183
- “Moving up one directory level” on page 183
- “Returning to any folder” on page 183
Opening a folder

You open a folder by clicking the folder name in the directory list. If the folder doesn't appear in the list, look in a different directory. Click the name of the appropriate directory above the navigation list, select the directory, and perform the following steps:

**To open a folder:**
1. Click the Seminar Rooms tab located at the top of the Breeze Manager window.
2. Click the name of the folder.

The folders and files within that seminar folder appear, and the name of the selected directory appears in the navigation links at the top of the browser window.

Moving up one directory level

You can move to the parent folder, the folder one level above the current folder, by clicking the Up One Level button on the navigation bar above the seminar list.

**To move up one folder:**
- Click the Up One Level button on the navigation bar above the seminar list.

The folders and files within the parent folder appear. The name and location of the parent folder appears in the navigation links list at the top of the browser window.

Returning to any folder

Above the functional links is a list of navigation links called the navigation trail, which indicates your current location in the directory structure. You can move to any folder, not just the one immediately above the current folder, by clicking the name of the folder in the navigation trail.
To return to any folder:

- Click the name of the parent directory in the navigation trail list. The folders and files within the higher parent directory appear. The name and location of the parent folder appears in the navigation links at the top of the browser window.

Searching the Seminar library archives

If you want seminar content and recordings to be available to other Breeze users, you must archive them in the Content library (for procedures, see “Moving uploaded content to the Content library” on page 187 and “Moving seminar recordings to the Content library” on page 188). You can also create archives of a Macromedia Breeze seminar from within the seminar itself (see Breeze Meeting User Guide for Hosts and Presenters).

For a detailed explanation of why you should archive seminar information in the Content library, see “About moving meeting contents to the Content library” on page 147; for instructions on searching the seminar archives, see “Searching the Content library” on page 36.

After the seminar content and recordings have been moved to the Content library, Breeze users with the proper permissions can use keywords to quickly locate archived information, including any Breeze content that was presented in the seminar. The text box for entering search keywords is located on the right side of the Breeze Manager menu bar.

**To use keywords to search for seminar information:**

1. Type one or more keywords into the Search Content text box.
2. Click the Search Content button.

The browser window shows the archive seminar name and information, along with a file preview.
Moving and deleting seminars and seminar content

This section explains how to move and delete seminars, as well as the content and recordings associated with a specific seminar. You can perform these functions only if you are a Breeze administrator or a user with permissions to manage a specific Seminar library folder. See the following procedures for details:

• “About moving seminar contents to the Content library” on page 185
• “Moving a seminar to a folder” on page 186
• “Deleting a seminar” on page 186
• “Moving uploaded content to the Content library” on page 187
• “Deleting uploaded content” on page 187
• “Moving seminar recordings to the Content library” on page 188
• “Deleting a seminar recording” on page 189

About moving seminar contents to the Content library

Content that is loaded from a seminar meeting room is stored only as part of that room; although the content is technically in the Seminar library, it is not immediately available for use in any other room. This means that you need to upload content again to every new seminar meeting room that you create. By moving your uploaded content to your Content library folder, you make it accessible from every other room. You can also make this content available to other people’s rooms, if they have the proper access permissions or if the content is public.

When you load content into a seminar meeting room from the Content library, you are making a reference to the content, not actually copying or moving it. You can reference the content from any seminar meeting room, so you do not have to move content from the content folder to a specific seminar folder. The only way to populate a seminar meeting room with content is to do it from within the room.

Recordings of a seminar contain everything that transpired in the seminar, both visually and aurally. Like the seminar content, recordings remain part of the seminar meeting room and are not available to anyone without access permissions to that seminar meeting room. Moving the recordings to the Content library preserves an archive of the seminar that is available to anyone with the proper permissions.

For information on uploading content outside of the seminar environment, see “Adding new content to the Content library” on page 44. For more information on uploading content from within a seminar, see Breeze Meeting User Guide for Hosts and Presenters.
Moving a seminar to a folder

You can move a specific seminar from one seminar folder to another if you are an administrator, a seminar host or a user with permission to manage both the original and target folders in the Meetings library.

To move a seminar:
1. Click the Seminar Room tab at the top of the Breeze Manager window.
2. Navigate to the seminar that you want to move.
3. Select the check boxes that are located to the left of the seminars you want to move.
4. Click the Move button on the menu bar above the seminar list.
   A new window appears, listing the items that you selected and letting you specify their new folder location.
5. Navigate to the folder location where you want to place the seminars by clicking the folder titles or the Up One Level button.
   As you navigate to the new location, the new destination appears in the upper right of the Breeze Manager window.
6. Click Move.
   The Move Successful page appears, confirming that the move was successful.
7. Click OK.

Deleting a seminar

Administrators or users with permissions to manage a specific Seminar library folder can delete seminar in this folder.

When you delete a seminar, the following occurs:
• The seminar is removed from the Seminar library.
• Participants can no longer access the seminar meeting room.
• Reports for the seminar are no longer available.
• The uploaded content and recordings associated with the seminar meeting room are removed from the Seminar library.

To delete a seminar:
1. Click the Seminar Room tab at the top of the Breeze Manager window.
2. Navigate to the seminar that you want to delete.
3. Select the check box located to the left of the seminar you want to delete.
4. Click the Delete button on the menu bar above the seminar list.
   A confirmation page appears.
5. Click the Delete button on the confirmation page to permanently delete the selected seminar.
   The seminars list page appears without the seminar you deleted.
Moving uploaded content to the Content library

To move uploaded content to the Content library, you must be an administrator or a user with permissions to manage the specific Seminars library folder that contains this seminar.

For a description of uploaded content and an explanation of the benefits of moving it to the Content library, see "Moving and deleting seminars and seminar content" on page 185.

To move uploaded content:

1. Click the Seminar Room tab at the top of the Breeze Manager window.
2. Navigate to the seminar that has uploaded content you want to move.
3. Click the name of the seminar in the seminar list to open it.
   The Seminar Information page appears.
4. Click the Uploaded Content link.
   The Uploaded Content page appears.
5. Select the check box to the left of each file that you want to move.
6. Click the Move To Folder button.
   A new window appears, listing the items that you selected and letting you specify their new folder location in the Content library.
7. Navigate to the folder location in the Content library where you want to move the content file by selecting the folder titles or the Up One Level button.
   As you navigate to the new location, the new destination appears in the upper right of the Breeze Manager window.
8. Click the Move button.
   The Move Successful page appears, confirming that the move was successful.
9. Click OK.

Deleting uploaded content

You can delete uploaded content that is associated with a seminar in a Seminars library folder if you are an administrator or a user with permissions to manage the specific Seminar’s library folder in question. When you delete uploaded content, you are deleting it from the Seminar library, unless you have previously moved the content to the Content library. In this case, although the content has been removed from the seminar (that is, the Seminars library), it is still available from the Content library.

To delete uploaded content:

1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the seminar with the content you want to remove.
3. Click the name of the seminar in the seminar list to open it.
   The Seminar Information page appears.
4. Click the Uploaded Content link.
   The Uploaded Content page appears with a list of content files for this seminar.
5. Select the check box to the left of each files that you want to delete.
6. Click the Delete button above the list.
   A confirmation page appears.
7. Click the Delete button on the confirmation page to permanently delete the selected content.
   The Uploaded Content page appears with an updated content list.

**Moving seminar recordings to the Content library**

You can move seminar recordings that are associated with a seminar in a Seminar library folder to the Content library if you are an administrator or a user with permissions to manage the specific Seminars library folder in question. For a description of seminar recordings and the reasons for moving them to the Content library, see “Moving and deleting seminars and seminar content” on page 185.

**To move a seminar meeting room recording:**

1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the seminar that has recordings you want to move.
3. Click the name of the seminar in the seminar list to open it.
   The Seminar Information page appears.
4. Click the Recordings link.
   The Recordings page appears.
5. Select the check box to the left of any recording that you want to move.
6. Click the Move to Folder button.
   A new window appears, listing the items that you selected and enabling you specify their new folder location in the Content library.
7. Navigate to the folder location in the Content library where you want to move the recording by clicking the folder titles or the Up One Level button.
   As you navigate to the new location, the new destination appears in the upper right of the Breeze Manager window.
8. Click the Move button.
   The Recordings page appears with an updated recording list.
Deleting a seminar recording

You can delete a seminar recording associated with a seminar in the folder if you are an administrator or a user with permissions to manage the specific Seminars library folder in question. When you do so, you are deleting it from the Seminar library unless you moved the recording to the Content library. To delete a seminar recording you have moved to the Content library, see “Deleting a content file or folder” on page 46.

To delete a seminar meeting room recording:
1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the seminar whose recording you want to delete.
3. Click the name of the seminar in the seminar list to open it.
   The Seminar Information page appears.
4. Click the Recordings link.
   The Recordings page appears with a list of recordings for this seminar.
5. Select the check box to the left of any recording you want to delete.
6. Click the Delete button above the list.
   A confirmation page appears.
7. Click the Delete button on the confirmation page to permanently delete the selected recordings.
   The Recordings page appears with an updated recording list.

Managing seminar folders

Administrators and users with permission to manage a specific Seminar library folder can organize the Seminar library by performing the following tasks for a specific folder:

You can manage seminar folders by doing the following:

• “Creating a seminar folder” on page 189
• “Moving a seminar folder” on page 190
• “Deleting a seminar folder” on page 190
• “Changing a seminar folder's name and description” on page 191
• “Setting seminar folder permissions” on page 191

Creating a seminar folder

Administrators and users with permission to manage a specific Seminars library folder can create folders and subfolders within it.

After you create the folder, you can move seminars into it; see “Moving a seminar to a folder” on page 186.

To create a seminar folder:
1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the location where you want to add the new folder.
3. Click the New Folder button on the menu bar above the seminar list.
4. Enter the name of the new folder on the new page that appears.
5. Click Save.

**Moving a seminar folder**

Administrators and users with permission to manage a specific Seminars library folder can move the location of the seminar folder in question. When you move a seminar folder, all the seminars within the folder also move to the new location.

**To move a seminar folder:**
1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the location of the seminar folder that you want to move.
3. Select the check box to the left of any folder that you want to move.
4. Click the Move button on the menu bar above the seminar list.
   - A new window appears, listing the items you selected and letting you specify their new folder location.
5. Click the folder titles or the Up One Level button to navigate to the folder location where you want to place the seminars.
   - As you navigate to the new location, the new destination location appears in the upper right of the Breeze Manager window.
6. Click the Move button.
   - The Move Successful page appears, confirming that the move was successful.
7. Click OK.

**Deleting a seminar folder**

To delete a seminar folder, you must be an administrator or a user with permissions to manage the specific seminar folder in question.

When a seminar folder is deleted, the following occurs:

- The seminar folder and all items in the folder and its subdirectories are *permanently deleted*; this means that this information *cannot be retrieved*.
- Participants cannot access the deleted seminars.
- Reports for the deleted seminars are not available.
- The uploaded content and recordings associated with a seminar are removed from the Seminars library.

**To delete a seminar folder:**
1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the folders you want to delete.
3. Select the check box to the left of any folder that you want to delete.
4. Click the Delete button on the menu bar above the seminar list.
   A confirmation page appears.
5. Click the Delete button on the confirmation page to permanently delete the selected folder.
   The Seminar List page appears without the name of the folder that you deleted.

**Changing a seminar folder’s name and description**

To change a seminar folder name and description, you must be an administrator or a user with permissions to manage the specific seminar folder in question.

**To create a seminar folder:**
1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the location of the folder whose name and description you want to change.
3. Click the folder name.
4. Click the Edit Information link above the seminar list.
   The Content Information page appears.
5. Enter the new name for this folder in the Title text input box, and, if desired, a description in the Summary text input box.
6. Click the Save button.
   The Seminar List page reappears with the new folder name in the navigation trail.

**Setting seminar folder permissions**

By default, when you create a seminar folder in the Seminar library (see “Creating a seminar folder” on page 189), the folder permissions are set the same as parent folder. In contrast to the permissions rules for the Content library, you cannot set permissions for a seminar within a given folder that are different from the parent folder. Seminar permissions thus apply to all seminars within a folder. However, administrators, seminar hosts, and users with permission to manage a specific Seminar library folder can edit a seminar permissions profile at the folder level.

When you set folder permissions, you control which users and groups can manage this folder in the library. To set access permissions (that is, seminar roles) for a specific seminar once the seminar has been created, see “Changing the seminar participants list” on page 175.

When customizing the permission settings for a seminar folder, you can select either of the following options:

- **Create a custom permissions profile for users and groups** Add users or groups to the profile and set the access for each user or group to Denied or Manage. User or group permissions that you set for the folder take precedence over permissions that are set for the parent folder.
- **Reset to Parent** If a custom permissions profile has already been created for a seminar folder, you can reset it to the permissions profile to its parent folder.

Note that you must first open the folder before you can change its permissions.
To set permissions for a seminar folder:
1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the seminar folder whose permissions you want to set.
3. Click on the folder name.
4. Click the Set Permissions button.
   One of the following pages is displayed:
   ■ If this folder has never been customized, the Current Setting page appears with the message
     “Current Setting: same as parent folder.”
     To maintain the same setting, click OK to return to the meetings and folders listing page.
     To customize the permissions, proceed to step 5.
   ■ If this folder has already been customized, the Set Permissions page appears with the
     Available Users and Groups list on the left and the Current Permissions list on the right.
     To modify this list, go to step 6.
     To reset to the permissions to those of the parent folder, click the Reset To Parent button
     above the Available Users and Groups list.
5. Click the Customize button.
   The Set Permissions page displays with the Available Users and Group list on the left and the
   Current Permissions list on the right.
6. Create a custom profile for this folder or modify the existing profile, as follows:
   ■ Press Control-click or Shift-click, as appropriate, to select multiple users or groups.
   ■ To expand a group so you can select individual members, double-click the group name;
     when you are done with this group, double-click Up One Level in the list to return to the
     parent folder list.
   ■ To search for a name in the list, click the Search button at the bottom of the window and
     enter the name to display it in the list, then select it.
7. Click Add.
   The users and/or groups you added appear in the Current Permissions list To remove a name
   from this window, select it and click Remove.
8. Assign permissions for each user and group in the Current Permissions window as follows:
   a Select a name in the list:
     Press Control-click or Shift-click, as appropriate to select multiple users or groups
     To search for a name, click the Search button at the bottom of the window and enter the
     name to display it in the list
   b For each selected name, click the Permissions button at the bottom of the window.
     A pop-up menu appears.
   c Select the permission appropriate for the selected name(s).
Modifying the permission access list

You can change the permission access list for a seminar folder by adding or removing users or groups in the list. Doing this lets you control exactly who has access to your file and the type of access.

**Note:** Users who belong to the Administrators group can view all seminars and folders. Users who belong to the Seminar Host group can only view any seminars and folders for which they have Manage permissions.

**To add a user or group to the permission access list:**
1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
2. Navigate to the seminar folder whose permissions you want to set.
3. Select the folder name.
4. Click the Set Permissions button.
   
   One of the following pages appears:
   - If this folder has never been customized, the Current Setting page appears with the message “Current Setting: same as parent folder.”
     To add users or groups, go to step 5.
   - If this folder has already been customized, the Set Permissions page appears with the Available Users and Groups list on the left and the Current Permissions list on the right.
     To add users or groups, go to step 6.
5. Click the Customize button.
   
   The Set Permissions page appears with the Available Users and Group list on the left and the Current Permissions list on the right.
6. To add users or groups, in the Available Users and Groups list, do the following:
   - Press Control-click or Shift-click, as appropriate, to select multiple users or groups
   - To expand a group so you can select individual members, double-click the group name; when you are done with this group, double-click Up One Level in the list to return to the parent folder list
   - To search for a name in the list, click the Search button at the bottom of the window and enter the name to display it in the list, then select it
7. Click the Add button.
   
   The users and/or groups you added appear in the Current Permissions window. To remove a name from this window, select it and click Remove.
8. Assign permissions for each user and group in the Current Permissions window as follows:
   a. Select a name in the list:
      Press Control-click or Shift-click, as appropriate to select multiple users or groups.
      To search for a name, click the Search button at the bottom of the window and enter the
      name to display it in the list, and then select it.
   b. For each selected name, click the Permissions button at the bottom of the window.
      A pop-up permissions menu appears.
   c. Click the permissions appropriate for the selected names.

   To remove a user or group from the permission access list:
   1. Click the Seminar Rooms tab at the top of the Breeze Manager window.
   2. Navigate to the seminar folder whose permissions you want to set.
   3. Click the folder name.
   4. Click the Set Permissions button.
      One of the following pages appears:
      ■ If this folder has already been customized, the Set Permissions page appears with the
        Available Users and Groups list on the left and the Current Permissions list on the right.
        To delete users or groups, go to step 6.
      ■ If this folder has never been customized, the Current Setting page appears with the message
        “Current Setting: same as parent folder.”
        To delete users or groups, go to step 5.
   5. Click the Customize button.
      The Set Permissions page displays with the Available Users and Group list on the left and the
      Current Permissions list on the right.
   6. To delete users or groups, do the following in the Current Permissions list:
      ■ Press Control-click or Shift-click, as appropriate, to select multiple users or groups
      ■ To search for a name in the list, click the Search button at the bottom of the window and
        enter the name to display it in the list, then select it
   7. Click the Remove button.
      The users and/or groups you removed are deleted from the Current Permissions window.
In Macromedia Breeze, the event application lets users manage the full life cycle of large or small events, including registration, invitations, reminders, and reporting. Breeze events can be used with meetings, seminars, presentations, or training.

An event generally involves many participants, so it requires careful pre-event planning and post-event management. For example, event hosts may want the ability to accept or reject participants after they register and the appearance of the event may be critical, so special company branding may need to be applied.

When to create events

You can create any of the following events: a Breeze meeting, seminar, presentation, course, or curriculum. An important distinction is that Breeze events support pre-event and post-event management, and Breeze meetings, seminars, presentations, courses, and curriculums are the events.

You can consider creating an event in the following situations:

• You want participants to register. You also want the option to screen participants for the event based on their registration information.

• You want to create branded event pages, such as event listing and description pages, which help build event awareness as well as branded registration and log-in pages.

• You want to customize the data that you collect about the participants for your reports. Because this data is based on registration information, it supplements the reports that relate to event content, such as the responses for quiz questions given in a course or polling questions for a specific meeting.

• You want people outside your organization to participate. Events are often listed on your organization's public website, so many participants will find your event there and register at the site.

• You want the ability to send out automatic e-mail messages such as invitations, reminders, registration confirmations, and thank you notes.
Event life cycle

You can divide the life cycle of a Breeze event into three phases:

- **Pre-event**, which includes determining the number of licenses available, creating content, establishing permissions, and inviting, registering, and reminding event participants.
- **In-event**, which is the actual presentation of the event using one or more presenters.
- **Post-event**, which involves redirecting the participant's browser to a specific URL, answering outstanding questions from participants, and monitoring various event-tracking activities through surveys and reports.

*Tip:* For a list of pre-event and post-event tasks you can perform with Breeze Manager, see "Post-Event Tasks" on page 198. For more background and detailed procedures on performing these tasks, see Chapter 15, "Working with Events," on page 201.

For detailed information on in-event activities, see *Breeze Meeting User Guide for Hosts and Presenters.*

Pre-event tasks

Careful pre-event planning and task maintenance can ensure that events run smoothly and that post-event activities can be completed quickly. The following are important pre-event tasks:

- Consider licensing considerations
- Determine event content
- Set event permissions
- Select approval setting

Licensing considerations

Before you set up an event, you should know how many licenses you have. If more people register for the event than you have licenses for, potential participants cannot join the event when they try to log in. Check with your Breeze administrator for licensing issues.

Content for events

Before you create an event, the content for the event must already exist in Breeze. (When you are setting up the event with the Event wizard, you must specify the content, meeting, course, curriculum, or seminar on which to build your event.) The following list shows several examples:

- To create a training event using a course or curriculum, the course or curriculum must already exist in the Macromedia Breeze Training library.
- To present content as an event, the content should be stored in the Breeze Content library.
- To use a meeting or a seminar as an event, the meeting or seminar must already exist in the Meetings or Seminar library.
Event permissions

Permissions are important to create events because permissions determine who can participate, view, and manage events. The following types of permissions should be considered when creating events:

- Attendance permissions
- Event library permissions

Attendance permissions

Attendance permissions determine the roles and functions of attendees in an event. The event host assigns the attendees' roles when setting up the event; for more information, see "Creating an event" on page 201.

Note: Attendees' roles appear in the Role column of the My Scheduled Events list in Breeze Manager.

Attendees can have the following roles and permissions:

- **Invited**  People who are sent an invitation to the event and are invited to register for the event.
- **Denied**  A person who has registered, but is not given access to the event by the host.
- **Participant**  People who attend the event as guests or as registered users from your organization. They have limited permissions.
- **Presenter**  A person who is showing content to attendees. Presenters are assigned Presenter permissions.
- **Host**  The person who creates the event, invites guests, selects content, and assigns roles to attendees. The host has full Presenter and Manage permissions (see Event library permissions) and can assign permissions to others. The host can assign Presenter and Manage permissions to others that will help manage the event.

Note: The Presenter and Host roles are used for live events (Breeze Meetings) only. For all non-live events, only the Participant, Invited, and Denied roles are used.

Event library permissions

Event library permissions define who can create events, modify events, and perform the tasks associated with the Event library files and folders, such as adding and deleting files and searching the library archives. The file management permissions are Manage and Denied.

For information on how to perform the tasks associated with creating, editing, and following up on an event, see Chapter 15, “Working with Events,” on page 201. For information on performing Event library file management tasks, see Chapter 16, “Managing the Event Library,” on page 221.
Registration and approval of attendees

Before an event occurs, the process of registering and approving attendees takes place. Events require registration but don’t always require approval. By default, an event does not require approval, but you can change this when you create the event. If you do not require approval, anyone who registers is approved automatically and can attend the event, providing you have a sufficient number of licenses. (As the event host, you can always go into Breeze Manager > Event > Participant Management and deny approval to anyone before the event occurs.) Requiring approval lets you control who attends the event.

In-event tasks

Much of the work involved in creating an event occurs during the content creation and pre-event stages. If you have the correct content and have completed the pre-event tasks, the actual event should go smoothly. There are tasks, however, that may need to be completed during an event, such as coordinating presenters and approving attendees, especially if the event is live. The following description shows the differences between nonlive and live events and the tasks that occur:

• **Nonlive on-demand events** do not happen in real time. Such events involve clicking a URL to view a presentation or self-paced course or curriculum. You can notify potential participants of the event through an e-mail invitation or by publishing the event on the public events listing page of the organization website. Both the e-mail invitation and the website listing contain a link that opens a registration form for the event. In many cases, nonlive events do not require any work during the time that the event occurs.

• **Live events** are scheduled, real-time events. During the event, it may be necessary to coordinate presenters, especially if there are multiple presenters.

Post-Event Tasks

One of the most important features of an event is to collect data. After an event is complete, the appropriate people should review the event reports. There may also be various administrative activities to do.

**Reporting** is the last activity in an event. It provides critical statistical data and participant feedback so event organizers and their managers can measure event success and make any necessary adjustments for future events. For more information about event reports, see “Event reports” on page 218.

**Administrative activities** such as file management tasks and answering follow-up questions from attendees occur after an event. For information on these tasks and how to perform them, see Chapter 16, “Managing the Event Library,” on page 221.
Event tasks

The following table is a summary of pre-event, in-event, and post-event tasks. For information and instructions on performing any of these activities, click the reference in the See column.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name event</td>
<td>Creates a name for each event.</td>
<td>“Entering event information” on page 202</td>
</tr>
<tr>
<td>Add description</td>
<td>Adds a description of the event’s details to encourage registration.</td>
<td>“Entering event information” on page 202</td>
</tr>
<tr>
<td>Add event image and branding</td>
<td>Sets branding and appropriate images on the page for the event.</td>
<td>“Entering event information” on page 202</td>
</tr>
<tr>
<td>Create unique registration</td>
<td>Enables the organizer to customize the questions asked of their registrants, including the number and types of questions and the appropriate response formats.</td>
<td>“Creating the registration page” on page 203</td>
</tr>
<tr>
<td>Set viewing status as public or private</td>
<td>Determines who can view the event and where the event should be positioned on the public page.</td>
<td>“Selecting participants and creating invitation mailing lists” on page 206</td>
</tr>
<tr>
<td>Preview the event</td>
<td>Lets a presenter view the content before it is posted to ensure that it is formatted correctly.</td>
<td>“Previewing registration and event pages” on page 210. Also, see the Breeze Meeting User Guide for Hosts and Presenters</td>
</tr>
<tr>
<td>Create detail page</td>
<td>Displays key properties regarding the event, such as time, presenter’s name, and description.</td>
<td>“Entering event information” on page 202</td>
</tr>
<tr>
<td>Set add, edit, delete capabilities</td>
<td>Enables the organizer to add, change, or remove descriptions of the event.</td>
<td>“Changing an existing event” on page 214</td>
</tr>
<tr>
<td>Create e-mail invitations</td>
<td>Creates an e-mail list and an e-mail template, including procedures for creating bulk e-mail addresses.</td>
<td>“Selecting participants and creating invitation mailing lists” on page 206</td>
</tr>
<tr>
<td>Send e-mail invitations</td>
<td>Lets you format and send e-mail to invitees.</td>
<td>“Selecting and customizing event e-mail messages” on page 208</td>
</tr>
<tr>
<td>Create e-mail notification of approval or denial</td>
<td>Sends an e-mail confirmation when a participant is approved or denied for an event.</td>
<td>“Selecting and customizing event e-mail messages” on page 208</td>
</tr>
<tr>
<td>Send e-mail reminders</td>
<td>Customizes e-mail reminders for the registered participants.</td>
<td>“Selecting and customizing event e-mail messages” on page 208</td>
</tr>
<tr>
<td>Task</td>
<td>Description</td>
<td>See</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Create guest profile</td>
<td>Enables a participant to create a guest profile at registration that is system-validated before the event. This security feature ensures that the individual who registered is the same person who is approved for entry.</td>
<td>“Event registration process” on page 219</td>
</tr>
<tr>
<td>Designate multiple initiators</td>
<td>Before an event, lets the host identify other people who have the permissions to start it.</td>
<td>“Viewing and changing the participant list” on page 216</td>
</tr>
<tr>
<td>Assign pre-event permissions</td>
<td>Before a meeting, lets the host define speakers who need Presenter permissions when they join the meeting.</td>
<td>“Viewing and changing the participant list” on page 216</td>
</tr>
<tr>
<td>Send follow-up e-mails</td>
<td>Sends follow-up e-mail messages to former event participants.</td>
<td>“Selecting and customizing event e-mail messages” on page 208</td>
</tr>
<tr>
<td>Create reports</td>
<td>Creates reports that provide participant-related information, as well as information related to the event itself, such as quiz scores.</td>
<td>“Event reports” on page 218</td>
</tr>
</tbody>
</table>
In Macromedia Breeze, the event application lets users manage the full life cycle of large or small events, including registration, invitations, reminders, and reporting. Breeze events can be used with meetings, seminars, presentations, or training.

This chapter provides procedures for creating, modifying, and joining events. It does not address the file management tasks associated with the Event library. For this information, see “Managing the Event Library” on page 221. For background information about events, including event workflow and activities, see “About Events” on page 195.

Creating an event

You create an event in Breeze using the Event wizard, which lets you do everything necessary to set up your event, including creating a name and summary, selecting an image to associate with the event, selecting the content, determining participants, and defining the different phases in your event in which e-mails are sent to participants.

Breeze events are built around content, such as a course or curriculum, a meeting, or a seminar. This means that the content must already exist in the appropriate library before you create the event; you cannot create the content when you create the event. You can use any single file or folder stored in your Content, Meetings, Training, or Seminar library. For information on storing content in the Content library, see Chapter 3, “Working with Content,” on page 35.

To open the Event wizard:

1. Click the Event Management tab in Breeze Manager.
2. Navigate to the folder where you want to add a new event.
3. Click New Event.

The Enter Event Information page appears. You are now ready to define some basic parameters for the event. For more information, see “Entering event information” on page 202.
Entering event information

The first step in the Event wizard is to enter event profile information and define basic parameters for the event.

**Note:** If you change the event start date to a date in the future, participants and presenters can still enter the meeting room at any time. When you are logged in to an event, you can stop participants from entering the room between events. For more information, see Breeze Meeting User Guide for Hosts and Presenters.

**To enter event information:**

1. On the Enter Event Information page, enter an event name. The name appears in the event list and in reports. This is a required field.

2. (Optional) In the Custom URL text field, enter a unique URL that is meaningful for your event; for example, it might be your name or the name of the event. If you do not enter a unique URL, the system automatically generates a URL for you. For more information, see “Custom URLs” on page 24.

3. (Optional) In the Event Information text field, enter a summary of the event, up to 750 characters in length. This information appears on the Event Information page and in events reports.

4. (Optional) In the Detailed Information text field, enter specific notes about the event, up to 1000 characters in length.

5. (Optional) In the Start Time text field, use the pop-up menus to select a month, day, year, and time for the event to begin.

6. (Optional) In the End Time text field, use the pop-up menus to select a month, day, year, and time for the event to end.

7. (Optional) In the Event Logo text field, click the Browse button to locate an image to use for your registration and event listing pages. The file can be in BMP, GIF, JPG, or PNG format. The best size is 100x135 pixels.

8. In the Presentation text field, select the type of event you are creating, such as a meeting, course, or seminar.

9. In the Attendee Approval text field, select the option to require that participants be approved after they register for the event. It is recommended that you select this option because it lets you control who can access the event.

10. Click Next.

    In the next step, you select the content for your event. For more information, see “Selecting content” on page 203.

**Note:** You can edit event information any time after you create the event. For more information, see “Changing event profile information” on page 215.
Selecting content

This is the second step in the process of creating an event. You must select the specific content you want to present in the event.

**Note:** The content must exist before you create an event (see “Adding content to be used for an event” on page 44).

To select content:

1. From the list of content that appears (meetings, seminars, presentations, and courses), select the content you want to use for your event.

   **Note:** If you select courses and curriculum, users are required to pass, fail, or complete the course or curriculum to be tracked as having attended the event. For content other than courses and curriculum, Breeze tracks only if the user has viewed the event. For example, if a user views a presentation, but only sees the first slide, they are still reported as having attended the event. In contrast, if a user views a course, but only a few of the slides, they are not shown in reports as having attended the event. In order to be shown in reports as having attended the event, the user would need to return and complete the course.(Also, you can view Time In and Time Out information by viewing the meeting By Attendee report.)

2. Click Next.

   **Note:** After you select a type of content (such as a meeting, seminar, presentation, or course), you cannot change the content type. You can, however, edit or delete the content and add a different type.

Now, you can create the registration page for the event.

Creating the registration page

This step of creating an event lets you identify the questions that participants must complete on the registration form. The information creates a guest profile for tracking the participant.

There are several required questions, which are preselected on the Create Registration form:

- E-mail address
- Password
- Retype password
- Name
You can select any of the other questions. For events that include guests outside your organization (those who find your event listing on your organization's public website), it's a good idea to get the company name and URL for screening purposes. For example, if the applicant works for a competitor, you might want to deny access.

**Create Registration**

Enter Event Information > Select Content > Create Registration > Customize Registration > Participant Management > E-mail Options

---

### Create Registration

<table>
<thead>
<tr>
<th>Registration Questions:</th>
<th>E-mail Address</th>
<th>Company Name</th>
<th>State</th>
<th>Mobile Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Password</td>
<td>Company URL</td>
<td>Zip</td>
<td>Home Phone</td>
</tr>
<tr>
<td></td>
<td>Retype Password</td>
<td>Address 1</td>
<td>Country</td>
<td>Fax</td>
</tr>
<tr>
<td></td>
<td>Name</td>
<td>Address 2</td>
<td>Direct Phone</td>
<td>Number of Employees</td>
</tr>
<tr>
<td></td>
<td>Title</td>
<td>City</td>
<td>Company Phone</td>
<td></td>
</tr>
</tbody>
</table>

---

You can create an event registration page that captures specific information from event attendees.

To add questions to the form:

1. Select the check box to the left of each item you want to include on the registration page.
2. Click Next.

Now, you can customize the registration page for the event.

**Customizing the Registration page**

You have a great deal of flexibility in designing a registration page for an event. You can create custom multiple choice, short answer, or true/false questions. You can also change the order of questions and delete questions at any time.

**Note:** True or false questions are always labeled True or False. If you want to create Yes or No questions, create a multiple-choice question with Yes and No as the two answer options (and set either Yes or No as the only correct answer).

1. Click the button that corresponds to the type of custom question that you want to include:
   - New Multiple Choice
   - New Short Answer
   - New True/False.
2. Do one of the following:
   ■ To add a new multiple choice question, proceed to step 3.
   ■ To add a new short answer question, proceed to step 5.
   ■ To add a new True/False question, proceed to step 7.

3. Click New Multiple Choice.
   The New Question window appears.

4. Do the following:
   a. Type a question in the text box.
   b. Type a possible answer for Answer 1.
   c. Click the Add Above or Add Below buttons to add another answer above or below Answer 1; if you click Add Above, Answer 1 becomes Answer 2.
   d. Type another possible answer.
   e. Repeat step c and step d for a maximum of four answers.
   f. To require that users answer the question, select Response Is Required.
   g. To delete an answer, click the Delete button next to the answer.
   h. Click Save.
      The Customize Registration window appears, showing your new question.
   i. Do one of the following:
      To add another multiple-choice question, repeat steps 3 and 4.
      To add a new open text question, proceed to step 5.
      To add a new True/False question, proceed to step 7.
      To end the registration set up, proceed to step 10.

5. Click New Short Answer question.
   The New Question window appears.

6. Do the following:
   a. Type a question in the text box.
   b. Select Response Is Required to require that users answer the question.
   c. Click Save.
      The Customize Registration window appears, showing your new question.
   d. Do one of the following:
      To add a new short answer question, repeat steps 5 and 6
      To add a new True/False question, proceed to step 7
      To end the registration set up, proceed to step 10

7. Click the New True/False question.
   The New Question window appears.
8. Type a question in the text box, and click Save.
   The Customize Registration window appears, showing your new question.

9. Do one of the following:
   ■ To add another True/False question, repeat steps 7 and 8.
   ■ To end the registration set up, proceed to step 10

10. (Optional) To move any question (except the required questions) up or down in the list, select
    the check box to the left of the question, and click Shift Up or Shift Down.

11. (Optional) To delete a question, select the check box to the left of the question, and click
    Remove.

12. Click Next.
    Now, you are ready to create a mailing list and send invitations.

**Selecting participants and creating invitation mailing lists**

This step lets you create invitation mailing lists. The following information is important when
creating mailing lists:

• A *guest* is someone who is not a Breeze user or who does not share the same Breeze account in
  which the event was created.

  **Note:** Guests cannot be converted to users. If you would like a guest to have access to other
  Breeze content that is not part of an event, you should add them as a user in the Administration
  section and then invite them as a user.

• A *user* is a Breeze user with a Breeze account in your organization.

  **Note:** Before sending out invitations, check with your Breeze Administrator for licensing issues. If
  more people register for the event than you have licenses for, potential attendees might not be able to
  join the event when they try to log in.

If the number of guests you are planning to invite is limited, you can type or copy and paste their
e-mail addresses using the Add Guest function. If the number is larger, in the hundreds or
thousands, you can import a comma separated values (CSV) file of users.

If you are inviting Breeze users, you can use the Select Participants page to add users to the event
invitation list and assign them permissions.

Finally, after you create the list, you can send out the invitations using default text or a customized
invitation.
To create event mailing lists:

1. To add a guest:
   a. Click the Add Guest button.
      The Add Guest window appears.
   b. Type or paste in e-mail addresses for all your invitees; use commas to separate each address.
   c. Click Save.
      The Invitations page appears, showing the e-mail addresses you entered in the list.

2. To add a user:
   a. Click the Add User button.
      The Add User window appears.
   b. In the Available Users and Groups list, select each user and/or group that you want to invite to this meeting as follows:
      Press Control-click or Shift-click to select multiple users or groups.
      To expand a group to select individuals, double-click the group name; when you finish, double-click Up One Level in the list to restore the original list.
      To search for a name in the list, click the Search button at the bottom of the window. When the text box appears, you can enter the name, and press Return. When the name appears in the list, you can select it.
   c. Click the Add button.
      The users and/or groups you added appear in the Current Participants list. To remove a name from this window, select the name, and click Remove.
   d. Click OK.
      The Invitations page appears, showing the names you added in the list.
3. When importing a CSV file of users, there are some specific requirements:
   - User names cannot contain commas (such as the comma after “Doe” in John Doe, Jr.). If any user names in the CSV file contain commas, it will not import.
   - The file should not contain empty lines. If the CSV file contains any empty lines, it will not import.
   - The column headers that are supported are name and login. For example, you can import a CSV file that has one column listing names and another column (separated by commas) listing corresponding logins, such as jane doe, jdoe@mycompany.com.
   - Only one e-mail address per user name is imported; duplicates are not. (The process starts from the bottom of the CSV file, so the last e-mail address and corresponding name are imported, not the first.)
     a. Click the Import List button.
     b. Click Browse to navigate to the correct CSV file.
     c. Select the CSV file, and click Open.
     d. Click Import to List.
     The Invitations page appears, showing the names you added to the list.
4. Click Next.
   Now, you can proceed to the final step in creating an event.

Selecting and customizing event e-mail messages

Breeze lets you specify nine kinds of e-mail messages that can be mailed at various stages of the event cycle. Eight of the messages are sent to participants either before or after the event, and the ninth message is an e-mail that you can receive each time a participant attends the event.
   • Send event invitations
   • Notify users that approval is pending
   • Notify users when approved for event
   • Notify users when denied for event
   • Show reminder when updates need to be sent
   • Remind participants closer to event
   • Send absentee follow-up after event
   • Send participants a thank you after event
   • Notify me when participants attend the event
You can select any, all, or none of these e-mail messages. Some messages are selected by default; if you do not want to send any e-mail messages, deselect the messages before you click Finish.

**E-mail Options**

Enter Event Information > Select Content > Create Registration > Customize Registration > Participant Management > E-mail Options

Select all e-mails that you would like to send once the event is published:

- [ ] Send event invitations
- [ ] Notify users that approval is pending
- [ ] Notify users when approved for event
- [ ] Notify users when denied for event
- [ ] Show reminder when updates need to be sent
- [ ] Remind participants closer to event
- [ ] Send absentees follow-up after event
- [ ] Send participants a thank you after event
- [ ] Notify me when participants attend the event

You can select from a variety of e-mail messages to communicate with attendees during an event cycle.

You can customize an e-mail message. Several types of messages let you attach a Microsoft Outlook calendar (vCal) event that adds the event to the recipient’s Outlook calendar.

**Note:** When customizing an e-mail form, there are several fields in braces ({}). Do not change any of these fields because they are variables that the system replaces with actual values that are specific to your event.

**To select, view, and/or customize e-mail messages for the event:**

1. Click the check box to the left of the e-mail messages you want to send.
2. To view or customize an e-mail message, click Customize.
   
   The default e-mail form appears.
3. You can make changes, but do not change any of the items in braces ({}).
4. Click Save to save your changes or Cancel to exit the e-mail form.
   
   The E-mail Options page appears.
5. When you finish customizing your messages, click Finish.
   
   The Event Information page appears. The event is not published, and no e-mail messages have been sent.
Previewing and modifying registration and event pages

Before you publish an event, you can do the following tasks:

- “Previewing registration and event pages” on page 210
- “Setting and previewing the event listing page” on page 210
- “Setting and previewing the event listing page” on page 210
- “Editing registration and event pages using Macromedia Contribute 3” on page 213

Previewing registration and event pages

You can view registration and event pages before publishing an event. You can preview the following pages:

- Event login
- Event information
- Registration login
- Registration form
- Registration confirmation

To preview a registration or event page:

1. Click the Events Management tab in Breeze Manager.
2. Navigate to the event that you want to preview.
3. Click the event name in the list.
   The Event Information page appears.
4. Do one of the following:
   ■ Click Preview event information, login, and registration pages.
   ■ Click Preview event listing page.
5. Click the desired item to preview.
   The page for that item appears as it will appear on the website.
6. Repeat step 4 for any other items you want to preview.

Setting and previewing the event listing page

An important page for your event is the event listing page. This page displays a list of all upcoming events with information about each event and can be branded for your organization. The event listing page shows the following information for each individual event:

- Event logo
- Event name
- Description (the Event Information text)
- A Register Now button, which takes the user to a registration form
- A More Information button, which takes the user to the event information page; it includes the Detailed Information text
All events within a single folder appear on one listing page. For example, you can create a folder that contains webinars your organization is hosting and then make that folder public so users can browse the event listings to find out about upcoming webinars. To create multiple event listing pages, simply create multiple folders.

You can create folders that are either public or private. A public event listing page is one that anyone can view from the hosted public pages. A private event listing page cannot be viewed publicly; a user must have login rights to view it. By default, event listing pages are private. To make an event listing page public, follow the procedure described next.

**To set a folder and event listing page as public:**

1. Click the Event Management tab in Breeze Manager.
2. Navigate to the desired folder.
3. Click Make This Folder Public.

   **Note:** If you want to change the folder setting from Public to Private, click “Make This Folder Private.”

The folder is now public and a URL is listed. The URL can be made available and the event listing page can be viewed by anyone from the hosted public pages.

<table>
<thead>
<tr>
<th>Name</th>
<th>Start Time</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiscal Year 2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Company Annual Earnings Report</td>
<td>05/12/2005 10:00 AM</td>
<td>01:00:00</td>
</tr>
</tbody>
</table>

*Event folders can be made private or public; public events have an associated event listing page (URL).*

A specific event listing can be previewed from the Event Information page.

**To preview an event listing page for a specific folder:**

1. Click the Event Management tab in Breeze Manager.
2. Navigate to the folder containing the events whose listing page you want to view.
3. Check that the folder is public. (Above the list of folders and events is a button that toggles between reading Make This Folder Public and Make This Folder Private. If the button says Make This Folder Private, the folder is currently public.)
4. Click on the URL below “Public Event Listing URL For This Folder.
   The event information appears exactly the way it will appear on the event listing page.
5. To close the preview window, click the Close button in the upper-right corner.

   **Note:** Remember to make this folder private again after you preview the page if you do not want the
   folder to be publically available yet.

A specific event listing can be previewed from the Event Information page.

**To preview the event listing for a single event:**
1. Click the Event Management tab in Breeze Manager.
   The Event folder list appears.
2. Navigate to the event whose listing page you want to view.
3. Click on the event.
4. Next to Participant View, click Preview event listing page.
   The event information appears exactly the way it will appear on the event listing page.
5. To close the preview window, click the Close button in the upper-right corner.

**Changing the event logo**

You can change the logo that you selected when you created an event.

**To change the logo associated with the event:**
1. Click the Event Management tab in Breeze Manager.
2. Navigate to the event whose image you want to change.
3. Click the event name in the list.
   The Event Information page appears.
4. Do one of the following:
   ■ Click the Edit Information link above the title bar
   ■ Click the Edit link inside the title bar.
   The Edit Event Information page appears.
5. Click Browse to find a new image for the event.
6. Select the image, and click Open.
   The Event Information page appears, showing the name of the graphics file in the text field
   next to Event Logo.
7. Click Save on the Edit Event Information page.
Editing registration and event pages using Macromedia Contribute 3

If you are a Macromedia Contribute 3 user, you can change the text and other components of Event pages using Contribute.

**Note:** Open Contribute by clicking Start > Programs > Macromedia > Macromedia Contribute 3.

The following items and the listed areas can be modified using Contribute:

- Registration login (banner logo, banner background color, event logo, text below event logo, and footer)
- Registration form (banner logo, banner background color, event logo, text below event logo, and footer)
- Registration confirmation (banner logo, banner background color, event logo, text below event logo, footer, and Thank You text)
- Event login (banner logo, banner background color, event logo, text below event logo, and footer)
- Event information (banner logo, banner background color, event logo, text below event logo, and footer)

**Note:** To edit the Registration login page, go to the Registration form page (you can make changes on this page), and click the Login link.

To edit event pages using Macromedia Contribute 3:

1. Click the Event Management tab in Breeze Manager.
2. Navigate to the event whose registration or event pages you want to edit.
3. Click the event name in the list.
   - The Event Information page appears.
   - **Note:** The URL link is listed as Edit URL.
4. Open Contribute 3.
5. Browse to Breeze Manager in the Contribute embedded browser, and log in.
6. Paste the Edit URL for the event into the Contribute address bar, and go to it.
7. Click the Create Connection button, and enter your settings (`Webdav / username = webapp login / password = webapp password`). Setup your webdav connection to Edit URL link in step 3, which will let you easily browse to the other event and registration pages.
8. Click Next.
9. Follow the on-screen instructions to complete the Connection wizard.
10. Edit and publish the pages, as desired.
Publishing events

When you publish an event, the following events occur:

- All selected e-mail message options become active. For example, if you selected the first option, send e-mail invitations, the invitations are automatically sent and you can no longer customize them. (You can, however, customize any other selected e-mail messages.)
- The registration form with its associated URL is available, so prospective attendees can begin registering for your event.

**Note:** It is best to make any changes to your event before publishing it, if possible. For more information, see “Changing an existing event” on page 214.

**To publish an event:**

1. Click the Events Management tab in Breeze Manager.
2. Navigate to the event you want to publish.
3. Click the event name in the list.
   
   The Event Information page appears. The status message says, “This event has not been published and listed on your site. E-mails have not been sent.”
4. Click Publish.
   
   A confirmation message appears, saying “Publishing this event will send e-mail based on your selected mail options.”
5. Click Publish.
   
   The Event Information page appears. The Publish button disappears and the Status message now states “This event has been published. E-mail options are active.”

Changing an existing event

You might want to make changes to an event before it occurs. For example, you might want to change the time the event begins or change participant permissions.

You should check the Current Participants list periodically to see the number of attendees. This will help you make sure that you have enough licenses and that all attendees meet approval criteria.

You should also check the most current registration reports, which show the names and status of your attendees and invitees. If you selected or customized questions to help identify potential participants, you can also view them. For information on using reports, see “Event reports” on page 218.

**Note:** If you make a change to an existing event, such as setting a new start time, there is an easy way to notify users by e-mail of the change. Open the E-mail Options page and check that the option “Show reminder when updates need to be sent” is selected. After you make a change, open the Event Information page and scroll to the Status field. A notice will appear in the Status field with the time and date of the change. Click Edit/Send Notifications, make any necessary changes, and click Send.
You can change an existing event in the following ways:

• “Changing event profile information” on page 215
• “Changing the registration questions” on page 216
• “Viewing and changing the participant list” on page 216
• “Changing event content” on page 217
• “Changing event e-mail options” on page 217

### Changing event profile information

You can edit the text on the Event Information page for event participants. If you select the e-mail option “Notify users when event has been updated,” any invitee whom you have previously notified about the event will automatically receive updated information.

**Note:** If you have sent invitations but did not select the “Notify users when event has been updated” option, you should do so before changing the profile information, so that potential attendees can be aware of your changes.

**To change event information:**

1. Click the Events Management tab in Breeze Manager.
   
   The Event folder list appears.

2. Navigate to the desired folder.

3. Click the event you want to change.
   
   The Event Information page appears.

4. Do either of the following:
   
   ■ Click the Edit link above the event information.
   
   ■ Click the Edit Information link at the top of the Event Management tab.
   
   The Edit Information page appears.

5. You can change any of the fields that appear, as well as browse for a new event listing image. For more information, see “Entering event information” on page 202.

6. Do one of the following:
   
   ■ Click Save.
   
   ■ Click Save and Rebuild. This option rebuilds HTML pages. (Only application if you use Macromedia Contribute to build pages. For more information, see “Editing registration and event pages using Macromedia Contribute 3” on page 213.)
   
   The Edit Information page appears, showing your changes.
Changing the registration questions

You can change any registration question, except the three required questions (name, e-mail, and password), which the system uses to validate a user.

To change registration questions:
1. Click the Events Management tab in Breeze Manager.

   The Event folder list appears.
2. Navigate to the desired folder.
3. Click the event you want to change.

   The Event Information page appears.
4. Click Registration Questions.

   The Registration Questions page appears.
5. Do one of the following:
   - To add a question to the registration page for this event, select the check box to the left of question, and then click Save.
   - To remove a question from the registration page, click the check box to the left of the question to deselect it, and then click Save.
6. To modify, delete, or add custom questions, click Customize.

   The Customize window appears, with all the questions you selected and created. Do any of the following, as desired:
   - To change the order of questions in the list, click the check box to the left of the question, and click Shift Up or Shift Down until the question is in the desired position.
   - To delete a question, click the check box to the left of the question you want to delete, and click Remove.
   - To modify a custom question, click the question text in the Customize window.
   - To add a question, click the button that corresponds to the type of custom question you want to add: New Multiple Choice, New Open Text, or New True/False.
7. When you finish, click Return to Registration Menu.

Viewing and changing the participant list

You can view the participant list at any time. For more information, see “Viewing a participants list” on page 223.

You can add or remove individuals or groups from the participant list. For more information, see “Managing event participants” on page 226.

You can also change any previously assigned permissions. For information about the different permissions you can assign for event participants, see “Changing permissions for event participants” on page 228.
Changing event content

You can replace event content with the same type of content, such as by replacing one meeting with another. If you purchased the Content application, you cannot add any new content to the Content library from here; you can only select existing content for your event. If you need to change the content, see “Working with Content” on page 35.

In addition, if you purchased the Macromedia Breeze Presenter, you can publish Breeze presentations from PowerPoint to the Content library for your event. For more information, see the Breeze Presenter User Guide.

To change event content:
1. Click the Events Management tab in Breeze Manager.
   The Event folder list appears.
2. Navigate to the desired folder.
3. Click the event you want to change.
   The Event Information page appears.
4. At the top of the Event Information page, click the Select Content link.
   The Select Contents page appears.
5. If the content you want does not appear in the list, navigate to the file or folder where the content that you want resides:
   a Click the appropriate link at the top of the tab (for example, Shared Content if you are replacing content).
      The directory for the selected link appears.
   b Scroll to the folder or file that you want and either select the check box to the left of it or click the folder or file, as appropriate; if you are in the Content library and need to go to a higher folder directory, click Up One Level.
6. Click Save.
   The Event Information page appears, showing your new content as the Presentation.

Changing event e-mail options

You can change e-mail options for any of the e-mail notification, reminders, or follow-up messages before they are sent.

To change event e-mail options:
1. Click the Events Management tab in Breeze Manager.
   The Event folder list appears.
2. Navigate to the desired folder.
3. Click the event you want to change.
   The Event Information page appears.
4. Click the Email Options link at top of the Events tab. Do any of the following:
   - Select any e-mail messages you want to send to participants.
   - Deselect any e-mail messages you do not want to send to participants.
   - Click Customize next to any messages that you want to edit. (You can edit messages, but do not change any of the items in braces ({})) on the Edit E-mail page.)
5. Click Save to save your changes or Cancel to exit the e-mail form.
The E-mail Options page appears.
6. Click Save.

Event follow-up

After an event, there are several tasks, which may be relevant to your event:

- Direct attendees’ browsers to a post-event termination URL where they can view product information and complete surveys. This can be done by customizing both the absentee and thank you follow-up e-mail messages to include this URL.
- Send thank you e-mail messages to attendees. To send these messages automatically after the event is over, see “Changing event e-mail options” on page 217
- Create an event meeting room where attendees can view content, if appropriate. This meeting room is the URL that participants used to enter the event. You can customize the thank-you e-mail message to include the URL and let the attendees know that the room is still available.
- Manage the event files in your library. For more information, see “Managing the Event Library” on page 221

Event reports

The Reports feature of Breeze Manager lets you create reports that show you an event from different perspectives. For more information about reports, see “Breeze reports” on page 22.

For more information about report filters, see “Setting and removing report filters” on page 25.

For information about downloading reports, see “Downloading reports” on page 28.

Event reports use the following definitions:

**Registered** The number of people who completed the registration form and were approved by the event host.

**Denied** The number of people who completed the registration form but were denied registration. For example, this might happen if the registration URL is made public on a website or through e-mail and people register for the event by mistake.

**Approved** The number of people approved to attend the event. This number includes people who completed the registration form and were approved. It also includes people who are approved directly, such as event presenters, who do not need to register.
Joining events as a participant

Any Breeze event that you are permitted to join appears in the event list. (To view the event list, navigate to the Breeze Manager Home tab, and click My Scheduled Events.)

Event registration process

All Breeze events require registration, although not all require approval. There are two ways to register for an event:

• From a link in the e-mail invitation, which applies only if you are invited by the event host.
• From a link in the event listing in the public pages of a company’s website; this applies if the event is open to the public.

After you click the registration link, a form appears. You can use this form to register for the event. (Registered Breeze users must log in before registering for the event.) During registration, you create a guest profile by typing in a password and answering questions. Then, depending on the way the event was created, you might receive a notification e-mail that provides your status (pending, approved, or denied). If you are approved, the e-mail message includes the following information:

• URL
• Dial-in telephone number and participant code that you use to phone in, if appropriate

In addition, if you received an e-mail invitation with a vCal attached and you have Microsoft Outlook, you can add the event to your Outlook calendar.

If you are a Breeze user and the event was created in the same Breeze account as yours, the event also appears in your Breeze Manager under My Scheduled Events.

Joining an event from Breeze Manager

It is simple to join an event from Breeze Manager.

To enter a scheduled event:

1. Click the My Scheduled Events link at the top of the Home tab.
   The My Scheduled Events list appears with your role identified in the Role column.
2. Scroll to the name of the event that you want to enter.
3. Click Enter.

In most cases, such as if you are the host or an approved participant, the event appears (the Breeze meeting opens). If you have not registered yet or need approval, you may need to enter your login, enter your password, and complete the registration form.
This chapter explains how to manage files in the Event library and addresses the administrative functions of event management.

To perform any of the procedures described in this chapter, you must have the proper permissions. Each procedure is preceded by the permission types that can perform the task. For more information about permissions, see “Event library permissions” on page 197.

If you want to enter, create, or change a specific event, see “Working with Events” on page 201.

If you need background information on events, see “About Events” on page 195.

Navigating the Event library

If you are an administrator, an event host, or a user with permissions to manage a specific Event library folder, you can navigate in the Event library. To locate and manage events, you must be able to navigate in the Event library.

Note: You can always click the Back button at the top of an Internet Explorer window to return to a previous page.

The following methods can help navigate in the Event library:

- “Opening a folder” on page 221
- “Moving up one directory level” on page 222
- “Returning to any higher parent directory level” on page 222

Opening a folder

You open a folder by clicking the folder name in the directory list.

To open a folder:

1. Click the Event Management tab in Breeze Manager.

   If the desired folder does not appear in the list, you are in the wrong directory. Click the name of the appropriate directory above the navigation trail (Shared Events, User Events, or My Events) to move to the correct directory.
2. Click the name of a folder.

The folders and files in that event folder appear, and the name of the selected directory appears in the navigation trail near the top of the browser window.

**Moving up one directory level**

You can move up to the parent folder (the folder one level above the current folder) by clicking the Up One Level button in the navigation bar above the event list. If this button is not displayed, you are already at the highest directory level.

**To move up one folder:**

- Click the Up One Level button in the navigation bar above the event list.

The folders and files in the parent folder appear. The name and location of the parent folder is displayed in the navigation trail near the top of the browser window.

**Returning to any higher parent directory level**

Above the navigation bar is a trail of navigation links, indicating your current location in the directory structure. You can move up to any parent folder, not just the one immediately above the current folder, by clicking a folder name in the navigation trail.

**To return to any parent folder:**

- Click the name of the parent directory in the navigation trail above the navigation bar.

The folders and files in the parent directory appear. The name and location of the parent folder appears in the navigation trail near the top of the browser window.

The navigation trail of folders and files indicates your current location in the directory structure.
Viewing information about an event

If you are an administrator, an event host, or a user with permissions to manage a specific Event library folder, you can view different kinds of information about an event from the Breeze Manager application. This information includes a participant list, an event content list, and a list of the event's audio recordings.

To view other information, you must have the appropriate permissions, as explained in the following procedures:

- “Viewing a participants list” on page 223
- “Viewing an uploaded content list” on page 223

Viewing a participants list

You can view a list of all registered participants for each event. To view the participant list, you must be an administrator, an event host, or a user with permissions to manage a specific Event library folder.

To view an event participants list:
1. Click the Event Management tab in Breeze Manager.
2. Navigate to the folder that contains the desired event.
3. Select the name of the event.
   The Event Information page appears.
4. Click the Participant Management link.
   The names of registered participants and groups appear.

To edit the list of participants, see “Viewing and changing the participant list” on page 216.

Viewing an uploaded content list

You can also view a list of all content that has been uploaded to the Breeze server from an event’s meeting room. To view the content list, you must be an administrator, an event host, or a user with permissions to manage a specific Event library folder.

To view a event uploaded content list:
1. Click the Event Management tab in Breeze Manager.
2. Navigate to the folder that contains the desired event.
3. In the event list, select the name of the event.
   The Event Information page appears.
4. Click the Select Content link.
   A list of all uploaded content appears.
Moving an event

Administrators, event hosts, and users with permission to manage a specific Event library folder can change the location of an event.

To move an event:
1. Click the Event Management tab in Breeze Manager.
2. Navigate to the location of the event that you want to move.
3. Select the check boxes to the left of the events that you want to move.
4. Click the Move button, located in the menu bar above the event list.
   A new window appears, listing the items that you selected and letting you specify their new location.
5. Navigate to the folder location where you want to place the event by clicking folder titles or the Up One Level button.
   You can select the exact folder to which you want to move an individual event.
6. When the correct folder location appears under Move to this folder, click the Move button.
   The Move Successful page appears, confirming that the move was successful.
7. Click OK.
Deleting an event

Administrators, event hosts, or users with permission to manage a specific Event library folder can delete events. When an event is deleted, the following actions occur:

• The event is removed from the Event library.
• Participants can no longer access the meeting room.
• Reports for the event are no longer available.
• The uploaded content and recordings associated with an meeting room are removed from the Event library.

If you want to prevent access to an event but retain reporting information, you can make the event accessible only to registered Breeze users and remove everyone from the event participants list. For more information, see “Editing event information” on page 225 and “Changing permissions for event participants” on page 228.

To delete an event:
1. Click the Event Management tab in Breeze Manager.
2. Navigate to the events that you want to delete.
3. Select the check boxes to the left of the events that you want to delete.
4. Click the Delete button in the menu bar above the event list.
5. On the Delete page, click the Delete button to permanently delete the selected events.

Editing event information

If you are an administrator or a presenter, you can modify the following event properties:

Name  A required field that appears in the event list and in reports.

Event Information  An event summary that appears on the Event Information page and in event reports. An event summary can be up to 750 characters in length.

Detailed Information  Specific information about the event, up to 1000 characters in length.

Start Time  The date and time the event begins.

End Time  The date and time the event ends.

Event Logo  A graphic or image for the event, usually used for company or organization branding of the event. The file can be in BMP, GIF, JPG, or PNG format. The best size is 100x135 pixels.

Attendee Approval  This option, when selected, requires that attendees are approved after they register for the event.
To edit event information:
1. Click the Event Management tab in Breeze Manager.
2. Navigate to the desired event.
3. In the event list, select the name of the event.
   The Event Information page appears.
4. Click the Edit Information link in the navigation bar.
   The Edit Information page appears.
5. Edit the event information.
6. Click Save.

Managing event participants
You can add or remove participants for an event and change participant or presenter permission settings if you are an administrator or a presenter for the event.

Note: Participants who are removed from the event do not receive an invitation, and they cannot access the event unless event access is changed to Anyone.

The following procedures can manage event participants:
- “Adding event participants” on page 226
- “Removing event participants” on page 228
- “Changing permissions for event participants” on page 228

Adding event participants
You can add participants to an event at any time after creating an event. Participants can be added as unregistered guests or as registered users or groups.

If you have a comma separated values (CSV) file that contains names and e-mail addresses, you can import the CSV file to add participants to an event. If you are importing a CSV file, there are some specific requirements:
- User names cannot contain commas (such as the comma after “Doe” in John Doe, Jr.). If any user names in the CSV file contains commas, it will not import.
- The file should not contain empty lines. If the CSV file contains any empty lines, it will not import.
- The supported column headers are name and login. For example, you can import a CSV file that has one column listing names and another column (separated by commas) listing corresponding logins, such as jane doe, jdoe@mycompany.com.
To add event participants as guests:

1. Click the Event Management tab in Breeze Manager.
2. Navigate to the desired event.
3. In the event list, select the name of the event.
   The Event Information page appears.
4. Click Participant Management in the navigation bar.
5. Click Add Guest.
6. In the text box, type or paste the e-mail addresses of the people you want to invite.
7. When you finish, click Save.

To add event participants as participants:

1. Click the Event Management tab in Breeze Manager.
2. Navigate to the desired event.
3. In the event list, select the name of the event.
   The Event Information page appears.
4. Click Participant Management in the navigation bar.
5. Click Add User.
6. In the Available Users and Groups list, select a user or group that you want to invite to the event and click Add. You can also click Search to find a user or group that is not listed.
   As you add users and groups, the Current Participants list on the right updates to show your changes.
7. When you finish, click OK.

To add event participants using a CSV file:

1. Click the Event Management tab in Breeze Manager.
2. Navigate to the desired event.
3. In the event list, select the name of the event.
   The Event Information page appears.
4. Click Participant Management in the navigation bar.
5. Click Import List.
6. Click Browse, and navigate to the desired CSV file.
7. Click Import to List.
   The names in the CSV file appear in the Users and Groups list.
Removing event participants

You can remove event participants at any time.

To remove event participants:
1. Click the Event Management tab in Breeze Manager.
2. Navigate to the desired event.
3. In the event list, select the name of the event.
   The Event Information page appears.
4. Click the Edit Participants link in the navigation bar.
5. Click the check boxes next to the groups or users that you want to delete from the participants list.
6. Click Remove.
   The updated Users and Groups list appears.

Changing permissions for event participants

You can change the permissions assigned to users or groups that are participating in an event.

To change a participant’s event permission:
1. Select the Event Management tab in Breeze Manager.
2. Navigate to the desired event.
3. In the event list, select the name of the event.
   The Event Information page appears.
4. Click the Participant Management link in the navigation bar.
   The Participant Management page appears.
5. In the Users and Groups list, select the user or group whose permission you want to change.
6. Click Set User Role and, from the pop-up menu, select the new permission type to assign. The permission types are: Denied, Invited, Pending, Participant, Presenter, or Host.
   The updated Users and Groups list appears.
Sending event invitations

If you are an administrator, an event host, or a user with permissions to manage a specific Event library folder, you can send event invitations.

An event invitation is an e-mail message that is sent to event attendees, informing them about the event date, time, duration, and location. The way that invitations are sent depends on the type of event:

**Invitees Only** If your event is for registered Breeze users only, you create a custom e-mail message from in the Breeze Manager. You can send the e-mail to all registered participants and presenters, presenters only, or participants only. You can customize the subject and message body. You also have the option to attach a Microsoft Outlook calendar vCard so participants can add the Breeze event to their calendars.

**Anyone** If your event is open to anyone who receives the event URL, you can create a new e-mail message in your default e-mail program. This message contains a prepopulated subject (Breeze event invitation) and a prepopulated message (event date, time, duration, location, and summary), but you can edit the text.

**To send invitations for an Invitees Only event:**
1. Select the Event Management tab in Breeze Manager.
2. Navigate to the desired event.
3. In the event list, select the name of the event.
   The Event Information page appears.
4. Click the Edit/Send Invitations link in the navigation bar.
   The Invitations page appears.
5. (Optional) If you want to send a blind copy of the invitation to anyone, add their e-mail address in the BCC Recipients text box. This can be useful if, for example, you want to send an invitation to key co-workers to let them know that you sent the invitation, but you don’t want invitation recipients to see that you sent the invitation to co-workers.
6. Edit the subject and the message body.
7. To attach a Microsoft Outlook Calendar vCard, select the check box next to the Attach Microsoft Outlook calendar event (vCal) to e-mail message option.
8. Click Send.

**To send invitations for an event open to anyone:**
1. Select the Event Management tab in Breeze Manager.
2. Navigate to the desired event.
3. In the event list, select the name of the event.
   The Event Information page appears.
4. Click the Participant Management link in the navigation bar.
5. Click Edit/Send Invitations.
   The Invitations page appears.

6. (Optional) If you want to send a blind copy of the invitation to anyone, add their e-mail address
   in the BCC Recipients text box. This can be useful if, for example, you want to send an
   invitation to key co-workers to let them know that you sent the invitation, but you don’t want
   invitation recipients to see that you sent the invitation to co-workers.

7. Edit the subject and the message body.

8. To attach a Microsoft Outlook Calendar vCard, select the check box next to the Attach
   Microsoft Outlook calendar event (vCal) to e-mail message option.

9. Click Send.

Managing event folders

Administrators, event hosts, and users with permissions to manage a specific Event library folder
can organize the Event library by creating, moving, and deleting folders. These users can also set
permissions for specific folders.

You can manage event folders by doing the following:

• “Creating an event folder” on page 230
• “Moving an event folder” on page 230
• “Deleting an event folder” on page 231
• “Setting event folder permissions” on page 231

Creating an event folder

Administrators, event hosts, and users with permissions to manage a specific Event library folder
can create folders and subfolders in it.

To create an event folder:
1. Select the Event Management tab in Breeze Manager.
2. Navigate to the location where you want to add the new folder.
3. Click New Folder.
4. Type in a name for the new folder.
5. Click Save.

Moving an event folder

Administrators, event hosts, and users with permissions to manage a specific Event library folder
can move the location of event folders. When you move an event folder, all the events in the
folder are also moved to the new location.

To move an event folder:
1. Click the Event Management tab in Breeze Manager.
2. Navigate to the location of the event folder that you want to move.
3. Select the check boxes to the left of the names of the event folders that you want to move.
4. Click Move.
   A new window appears, listing the items you selected.
5. Navigate to the folder location where you want to move the event by clicking folder titles or the Up One Level button.
6. When the correct folder location appears under Move to this folder, click the Move button.
   The Move Successful page appears, confirming that the move was successful.
7. Click OK.

Deleting an event folder

Administrators, event hosts, and users with permissions to manage a specific Event library folder can delete event folders.

When an event folder is deleted, the following occurs:

- The event folder and all items in the folder and its subdirectories are permanently deleted, and the information cannot be retrieved.
- Participants cannot access the deleted events.
- Reports for the deleted events are no longer available.
- The uploaded content and recordings associated with an event are removed from the Event library.

To delete an event folder:

1. Click the Event Management tab in Breeze Manager.
2. Navigate to the desired folders.
3. Select the check boxes to the left of the folders that you want to delete.
4. Click the Delete button in the menu bar above the event list.
5. On the Delete page, click the Delete button to permanently delete the selected items.

Setting event folder permissions

By default, when you create an event folder in the Event library, the folder permissions are set the same as the parent folder. The folder has the same permissions profile as that of the folder in which it is created.

Administrators, event hosts, and users with permissions to manage a specific Event library folder can edit the permission profile of an event folder.

Note: Unlike in the Content library, permissions cannot be set for a specific event in the Event library. Event permissions apply to all the events in a folder.
When customizing the permission settings for an event folder, you can choose either of the following options:

**Create a custom permissions profile for users and groups**  Add users or groups to the profile, and set the access for each user or group to Denied or Manage. User or group permissions that you set for the folder take precedence over permissions that are set for the parent folder.

**Reset to Parent**  If a custom permissions profile has already been created for an event folder, you can reset it to the permissions profile to its parent folder.

**To set permissions for an event folder:**
1. Click the Event Management tab in Breeze Manager.
2. Navigate to the desired event folder.
3. Select the name of the event folder whose permission settings you want to set.
4. Click Set Permissions.
   The Set Permissions page appears.
5. If you see a Customize button, click it; otherwise, go to step 6.
   **Note:** If the folder already has a custom profile, there is no Customize button.
6. On the Set Permissions page, do one of the following:
   - Create a custom profile for groups and users, or modify an existing profile for groups and users, and modify the access permissions. For more information, see “Modifying the permissions access list” on page 232.
   - If the folder already has a custom profile and you want to reset the permissions to those of its parent folder, click the Reset to Parent button.

**Modifying the permissions access list**
You can change the permissions access list for an event folder by adding or removing users or groups from the list. This ability lets you control exactly who has access to your file and the type of access.

**Note:** Users who belong to the Administrators group can view all events and folders. Users who belong to the Event Hosts group can view all events and folders in the Shared Events folder and their My Events folder.

**To add a user or group to the permission access list:**
1. Click the Event Management tab in Breeze Manager.
2. Click the check box to the left of the event folder.
3. Click the Set Permissions button.
   The Set Permissions page appears with the Available Users and Groups list on the left and the Current Permissions list on the right.
4. To add users or groups, in the Available Users and Groups list, do the following:
   - Press Control-click or Shift-click, as appropriate, to select multiple users or groups
   - To expand a group so that you can select individual members, double-click the group name. When you are done with this group, double-click the Up One Level icon in the list to return to the parent folder list.
   - To search for a name in the list, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.

5. Click the Add button.
   The users and/or groups that you added appear in the Current Permissions window. To remove a name from this window, select it and click Remove.

6. Assign permissions for each user and group in the Current Permissions window as follows:
   a. Select a name in the list:
      - Press Control-click or Shift-click, as appropriate to select multiple users or groups.
      - To search for a name, click the Search button at the bottom of the window and enter the name to display it in the list, and then select it.
   b. For each selected name, click the Permissions button at the bottom of the window.
      - A pop-up permissions menu appears.
   c. Click the permissions appropriate for the selected names.

To remove a user or group from the permission access list:
1. Click the Event Management tab in Breeze Manager.
2. Select the check boxes next to the names of the folders that you want to remove the user or groups permissions from.
3. Click the Set Permissions button.
4. On the Set Permissions page, select the check boxes next to the names of the users or groups for whom you want to remove the permissions.
5. Click Remove.
6. On the Remove page, click the Remove button.
   The Set Permissions page appears.
CHAPTER 17
About Administration

Breeze account administration comprises two basic functions, each represented by its own set of links on the Administration tab of Breeze Manager: managing accounts (account management) and managing users and groups (user management). Both functions are performed by the Breeze administrator, the only Breeze user who has access to the Administration tab.

The Administration tab contains the following links to the basic administration functionalities:

- **Account**, which enables you to define, view, and manage all aspects of your organization's Breeze account, as well as to view account-specific data using the Reports link; see Chapter 18, "Managing the Breeze Account," on page 237.

- **Users and Groups**, which is your access point to Breeze Manager's user management functionality. For information on all the user management activities you can perform, see Chapter 19, "Working with Users and Groups," on page 255.

- **Customization**, which enables you to customize and brand Breeze for your organization. This link is only operable if your organization has purchased the Customization feature. For details on Customization, see Chapter 18, "Managing the Breeze Account," on page 237.

- **Service Plan**, if your organization signed up for its Breeze account on the web, you can click the link to get more information.

- **Administration Dashboard**, which enables you to monitor different elements of your organization's Breeze account using a graphical interface; see Chapter 18, "Managing the Breeze Account," on page 237.

**Administration workflow**

You use the account management features to define the parameters for setting up Breeze users and, if your organization purchased Customization features, to create the look of the Breeze user interface.

After this, you define the attributes of your organization's Breeze account user profiles, as well as the login and password rules that Breeze users must follow. When these are in place, you can add users and groups to the Breeze account.
Finally, after Breeze is operational and you have set up users and groups in your organization’s Breeze account, you can use the Account Summary, Reports, and Administration Dashboard features as account maintenance tools to monitor system usage.

**Account management activities**

The account management aspects of the administrator’s job involve controlling the following elements of the company’s Breeze installation:

- Breeze account profile information, which defines the company’s Breeze account; see “About your organization’s Breeze account” on page 237 and “Editing Breeze account information” on page 240.
- Branding, which lets you customize the appearance of the Breeze Manager user interface, including banner, login, and meeting logos and colors; see “Customizing Breeze” on page 241.
- Reports, which let you view Breeze usage information; see “Viewing your account reports” on page 246.

**User management activities**

The Breeze administrator’s role is to define the user profile elements, manage login and password rules, and create, add, remove, and manage Breeze accounts for individual users and groups. This includes setting permissions for users and groups, either by assigning users to predefined groups with specific access privileges, or by setting permissions for users for high-level folders in the Breeze libraries. For information, see the following sections:

- Breeze permissions, as they apply to users, groups, and the Breeze libraries; see “Breeze permissions architecture” on page 255, “Types of groups and group permissions” on page 258, and “Library activities and their permissions” on page 264. These sections explain how permissions work in Breeze. You should read these sections before adding users and groups to your organization’s Breeze account.
- Defining user profile attributes and login and password rules, which let you define the attributes and parameters of user logins and passwords; see “Customizing user profile fields” on page 272 and “Managing login and password parameters” on page 275.
- Adding users and groups to your Breeze account, either manually or through other methods; see “Breeze account creation workflow” on page 275, “Working with LDAP-acquired users and groups” on page 276, “Importing user and groups CSV files” on page 276, “Creating groups manually” on page 280, and “Creating a new user manually” on page 282.
- Assigning permissions in the Breeze libraries for the groups and users that you have added; see “Setting custom permissions for the Breeze libraries” on page 285.
- Managing existing users and groups; see “Changing and viewing information for existing users” on page 286 and “Viewing and changing information for existing groups” on page 292.
CHAPTER 18
Managing the Breeze Account

If you are an administrator, you can administer all the details that pertain to your organization’s Breeze account by clicking the following links at the top of the Administration tab in Macromedia Breeze Manager:

• Account, which enables you to manage the settings of the Breeze account that are unique to your organization and to generate reports using the Report link; see “About your organization’s Breeze account” on page 237, “Editing Breeze account information” on page 240, and “Viewing your account reports” on page 246.

• Users and Groups provides your access point to Breeze Manager’s user management functionality. For information on all the user management activities that you can perform using this link, see Chapter 19, “Working with Users and Groups,” on page 255.

• Customization, which enables you to customize Breeze for your organization. This link is only operable if your organization purchased Customization features. For details on Customization, see “Customizing Breeze” on page 241.

• Service Plan, if your organization signed up for its Breeze account on the web, you can click this link to get more information.

• Administration Dashboard, which enables you to monitor different elements of your organization’s Breeze account; see “Viewing the Administration Dashboard” on page 246.

About your organization’s Breeze account

The Account page appears when you click the Administration tab. It provides information about your organization’s Breeze account, including account information and account features.

The Account page provides the following information:

• General account information, which is a profile of the entire Breeze account; see “General account information” on page 238.

• Feature information, which describes the applications that are enabled for this Breeze account, as well as the pricing and quota information available for each; see “System and application feature information” on page 238.

• Advanced features, which describes special products that are enabled for this account; see “Advanced feature information” on page 240.
General account information

The information under the Account Information heading shows profile information for the entire Breeze account. It contains the following information:

- **Name**  The name of your Breeze account.
- **Domain**  The domain where your Breeze account resides.
- **Default Time Zone**  The time zone set for your account.
- **Expiry Date**  The expiration date for your account.
- **Primary Contact**  The individual who was named as the primary contact when the Breeze account was established for your organization.
- **Primary Contact E-mail**  The primary contact's e-mail address.

System and application feature information

The information under the Features heading shows which Breeze applications are enabled for your organization's Breeze account, as well as the pricing model, quota, and usage information for each. The pricing model determines how your organization pays for its Breeze usage and is associated with the quota and usage information that you see under System Features. There are different models for training and meetings.

Training pricing models

There are two pricing models for training, the concurrent learner model and the named learner:

- **Named learners**  This applies a limit, which is based on how many users can have a valid account on the system. Only users with valid accounts may be active in courses or curriculums.
- **Concurrent learners**  This limits how many how many learners can be active in all courses or curriculums at the same time.

Meeting pricing models

Like training, there are two separate pricing models for meetings; you see the information appropriate for the model that your organization purchased:

- **Concurrent attendee**  This model applies a limit that determines how many participants can be active in a meeting at the same time. Attendees in a seminar are not affected by this limit.
- **Named organizer**  This model applies a limit that determines how many users can initiate meetings. Each named organizer can initiate only one active meeting at a time, and each meeting is limited to 15 participants including meeting organizers. A named organizer must be present to start a meeting, and a meeting will end if all named organizers exit from the meeting.
Pricing model rules

Concurrent and named users cannot mix. That is, you cannot have quotas for named organizers and concurrent users in the Meeting application at the same time, nor can you have named learners and concurrent learners in Training application.

However, you can have named organizers in the Meeting application and concurrent learners in the Training application at the same time, or you can have concurrent users in the Meeting application and named learners in the Training application at the same time. In other words, the Meeting and Training applications are treated separately.

Seminar room quotas

Seminar rooms are treated individually and do not impact any other quotas. There is a seminar attendee limit, which determines how many participants can be active in a particular seminar at the same time. The limits apply to each seminar room independently.

At least one Breeze user with presenter or host rights for the seminar must be in the room in order for others to enter, even if the seminar is a public meeting. A seminar ends if all meeting users with presenter or host rights exit from the meeting.

Features

This section provides examples of the kind of information that you see under the System Features heading. Such information is specific to your organization's Breeze account, which means that you only see the applications that your organization has purchased. The check mark to the left of the application name means it is enabled, and the information you see for it relates directly to the pricing model and quotas that your organization uses for this application. For example, you do not see Presentation listed if it is not enabled in your Breeze installation.

System Features  This provides the following information:

- Bandwidth per Month (MB), the monthly amount of data transmitted to or from your Breeze account is shown to the left of the slash; to the right of the slash is how much bandwidth you are allowed to use.
- Disk Usage (MB), the amount of hard disk spaced consumed by your Breeze account is shown to the left of the slash; to the right of the slash is how much disk usage you are allowed to use.

Presentation  How many authors your installation currently has over how many are permitted.

Training  The type of pricing model that your organization uses for training; for details, see “Training pricing models” on page 238 and “Pricing model rules” on page 239.

Meeting  The type of pricing model your organization uses for meeting attendees (see “Meeting pricing models” on page 238 and “Seminar room quotas” on page 239) and its associated information.
Advanced feature information

This section lists all the possible features that your organization has purchased to address specific needs. Depending on the features that your organization has purchased, you see any of the following:

**FlashPaper**  This is a Macromedia product that enables you to convert HTML, Microsoft Word, and PowerPoint files into Macromedia Flash documents for the web.

**Customization and Rebranding**  This feature allows you to customize and brand your Breeze installation for your organization. If you have customization enabled, for information, see “Customizing Breeze” on page 241.

**Secure Connection/Non-secure Connection**  This determines whether or not your Breeze installation uses SSL to encrypt all communication between the server and connected users.

Editing Breeze account information

Most of the account information that you see on the Account Summary page derives from your organization’s Breeze installation and cannot be changed through Breeze Manager. As the Breeze administrator, you can only modify two attributes: the time zone for your Breeze account and the administrator contact information (first and last names and e-mail address).

The information that you alter here applies to the entire Breeze account. To change your own account profile information, click My Profile in the upper-right corner and use the Edit My Preferences option.

**To change the account information:**

1. Click the Administration tab at the top of the Breeze Manager window.
   
   The Administration page appears, with the Account Summary information visible.

2. Click Edit Information.

   The Edit Information page appears, with the Default Time Zone pop-up menu under the Account Information header, and the contact information text boxes under the Primary Contact header.

3. Do either or both of the following, as appropriate:

   - To change the default time zone, click the arrow on the Default Time Zone pop-up menu and select the appropriate time zone.

   - To change the account contact information, enter your first name, your last name, and your e-mail address in the Primary Contact text boxes.

4. Click Save.
Customizing Breeze

If your organization purchased the Breeze Customization features, the Customization link is enabled on the Administration tab. This link includes features that let you adapt the appearance of your Breeze installation to match your organization's identity. When you click Customization, three additional links appear that allow you to customize the following Breeze attributes:

- Customize Banner, for customizing the Breeze Manager user interface (UI); for this information, see “Customizing Breeze Manager” on page 241.
- Customize Login, for customizing the Breeze login page; see “Customizing the Breeze login page” on page 243. The Breeze login page is used for all Breeze functions except Breeze Events; that is, users see the Breeze log in page when they log into Breeze Manager, a Breeze Meeting, or on-demand trainings or presentations. The Events login page is a separate login page created by the event manager when an event is initially set up, and is tied only to that particular event.
- Customize Meeting, for customizing the Macromedia Breeze Meeting appearance; see “Customizing the Breeze Meeting” on page 244 (this does not include the meeting room layout; for this information, see Breeze Macromedia User Guide for Hosts and Presenters).

Customizing Breeze Manager

Use the Customize Banner link to customize the following elements of the Breeze Manager user interface (UI):

- Background color.
- Top links text color; these are the persistent links in the upper-right corner: My Profile, Help, and Logout.
- Navigation text color; these are the links below the tab bar.
- Selection highlight color.
- Table header color, the bars that identify page titles or columns on list pages.
• Banner logo, the image that appears in the upper-left corner of Breeze Manager. This image is clickable, and takes the user to the web address specified in the logo URL text box. The image must be a JPEG, PNG, GIF, or BMP file and must be 275 by 50 pixels.

To customize Breeze Manager:

1. Click the Administration tab.
2. Click Customization.
   The Customization page appears with the Customize Banner option selected.
3. To change the color of the background, top links text, navigation text, selection highlight, or table header, do the following:
   a. Click the appropriate item name in the list to the left of the color selection box.
   b. Move the mouse over the color selection box to find the color for the item that you selected.
   c. Click the color that you want for this item.
      The color for the corresponding item in the preview display above changes to the color that you chose. To clear this selection, click Clear to return to the previous setting, or Reset to Default to restore the original setting.
   d. Repeat step a through step c for each item whose color you want to change.
   e. To select a banner logo, see step 4.; to end this procedure, see step 5.
4. Click Browse below the Banner Logo heading to browse for the image (JPEG, PNG, GIF, or BMP file) that you want; if you do not select another logo, the default logo is Macromedia Breeze.

After you select the image, it appears in the upper-left corner of the preview area.

5. Click Apply to save your changes.

Your changes appear within 5 to 10 seconds; alternatively, you can refresh the page.

**Customizing the Breeze login page**

Use the Customize Login link to customize the Breeze login page. You can modify any of the following four attributes:

- Meeting name color
- Pod border color (the border surrounding the text input windows)
- Background color (login area color)
- Main logo image; this must be a JPEG, PNG, GIF, or BMP file, 410 by 310 pixels
To customize the Breeze login page:

1. Click the Administration tab.
2. Click Customization.
   The Customization page appears with the Customize Banner option selected.
3. Click Customize Login.
   The Custom Login page appears.
4. To change the color of the meeting name text, pod border, or background color, do the following:
   a. Click the appropriate item name in the list to the left of the color selection box.
   b. Mouse over the color selection box to find the color for the item you selected.
   c. Click the color you want for this item.
      The color for the corresponding item in the preview display above changes to the color you selected. To clear this selection, click Clear to return to the previous setting, or Reset to Default to restore the original setting.
   d. Repeat step a through step c for each item whose color you want to change.
   e. To select a main logo, see step 5.; to end this procedure, see step 6.
5. Click Browse below the Main Logo heading to browse for the image (JPG, PNG, GIF, or BMP file) you want; if you do not select another logo, the default logo is Macromedia Breeze.
   After you have selected the image, it displays in the upper-left corner of the preview display.
6. Click Apply to save your changes.
   Your changes appear within five to ten seconds; alternatively, you can refresh the page.

Customizing the Breeze Meeting

Just as for Breeze Manager, you can customize seven attributes of the Macromedia Breeze Meeting appearance. The customization settings you apply here appear in every Breeze Meeting created in your organization's Breeze account.

However, these settings do not affect the meeting layout, which the meeting host designs to accommodate the meeting's function (for details on creating a meeting layout, see Macromedia Breeze Meeting User Guide for Hosts and Presenters). The Customize Meeting option addresses the cosmetic aspects of a meeting by allowing you to change the following:

- Menu selection highlight color for the first selection of a menu
- Menu selection highlight color for the second selection of a menu; this highlights the selection made on the secondary menu that appears after the first menu selection is made
- Button rollover color, the color outline that appears around a button when you mouse over it
- Background color
- Title bar color, the pod title color
• Meeting logo, a unique image for your organization’s meetings; this must be a JPG, PNG, BMP, or GIF file, 50 by 20 pixels wide.

• Meeting URL, a website to which users are directed when they click the meeting logo

To customize the Breeze Meeting

1. Click the Administration tab.

2. Click Customize.

   The Customize page appears with the Customize Banner option selected.

3. Click Customize Meeting.

   The Customize Meeting page appears.

4. To change the color of the menu highlights, button rollover, background, or title bar, do the following:
   a. Click the appropriate item name in the list to the left of the color selection box.
   b. Move the mouse over the color selection box to find the color for the item that you selected.
   c. Click the color you want for this item.

   The color for the corresponding item in the preview area changes to the color that you selected. To clear this selection, click Clear to return to the previous setting, or Reset to Default to restore the original setting.
   d. Repeat step a through step c for each item whose color you want to change.
   e. To select a meeting logo, see step 5.; to enter a meeting logo URL, see step 6.; to end this procedure, see step 7.
5. Click Browse below the Meeting Logo heading to browse for the image (JPEG, PNG, GIF, or BMP file) you want; if you do not select a logo, the default logo Macromedia Breeze is used. After you select the image, it appears in the upper-left corner of the preview area.
6. Enter the appropriate logo that you want in the Logo URL text box; if you enter another URL, the default is www.macromedia.com.
7. Click Apply to save your changes.
   Your changes appear within 5 to 10 seconds; alternatively, you can refresh the page.

**Viewing the Administration Dashboard**

You can click the Administration Dashboard link on the Administration tab to see a graphical representation of your usage information. It consists of five bar graphs that display the following information:

- Authors quota, the number of authors your Breeze account allows
- Learners quota
- Meeting administrators quota (Meeting hosts quota)
- Monthly bandwidth (in megabytes)
- Disk space per month (in megabytes)

**Dashboard options**

The light green bar represents your current usage and the dark green represents your limit. You can use both these bars to obtain the following information:

- The height of each bar falls within a specific range, but you can move the mouse over either bar to see the precise maximum figure for that bar.
- If you click in either bar for any of the three group quota graphs, the corresponding group members list appears for this group.
- The monthly bandwidth and disk space graphs map to the information shown under the Features header in the account profile (see “System and application feature information” on page 238).

**Viewing your account reports**

On the Accounts Summary page, you can click the Reports link to access several reports:

- “Training Reports” on page 247
- “Meeting Reports” on page 247
- “Event Reports” on page 247
- “Downloadable Reports” on page 247
- “Custom URL Management” on page 252
Training Reports

This feature provides summary learner quota information (number of learners compared with the number allowed). The Training Reports appear when you click the Reports link from the Accounts page after you access the Administration tab.

Meeting Reports

This feature provides the maximum number of Macromedia Breeze Meeting attendees that have been supported by Breeze at one time (concurrent peak) for the current month compared with the allowable quota, and the number of users, if any, currently participating in any active meetings, both live and non-live.

Under the attendees information is a list of active meetings. These are meetings that are currently in progress that you can monitor from this page. This list shows the meeting name, the name of the host or presenter, the number of participants, the meeting start date, and its duration. You can click the meeting name to enter the meeting to intervene, in case there are any problems. For example, in a situation where you needed to free up more meeting spaces for another meeting, you could enter an active meeting and type a message to the host that some people must exit from the meeting. Conversely, if there are no active meetings occurring, this list is blank.

Event Reports

This feature shows the number of active (current) events for the Breeze account, and a list of these. For each, the report shows the event name, number of registered users, event start date, and event completion date. You can click the name of a specific event to open the Event Information page for this event and see more information.

Downloadable Reports

This feature provides the ability to download five different kinds of reports as CSV files that you can export to external systems, such as spreadsheets. You can also apply report filters that show data for specified time periods or users; see “Setting and removing report filters” on page 25.

When you download a CSV file, you have the option of saving or opening the report. If you are running Breeze Manager in an Internet Explorer browser and choose to open the report, Windows automatically opens it in Excel. In this case, the information is difficult to read because you must double-click each cell to see its information.

Another option is to save the CSV file to your desktop, and open the file from Notepad, which makes it easier to read. (To open Notepad, select Start > Accessories > Notepad.)

You can download the following reports; see the relevant section for a description of each report:

- “Interactions” on page 248
- “Users” on page 249
- “Assets” on page 250
- “Questions” on page 250
- “Slide Views” on page 251
To obtain a downloadable report:
1. Click the Administration tab.
2. Click Reports.
   The Reports page appears.
3. Click Downloadable Reports.
   The Downloadable Reports page appears, with the available report types and a description of each one.
4. Click the Download link or the Download Report Data button.
   The File Download window appears, giving you the option of saving or opening the CSV file.
5. Click Open or Save, as appropriate.

   **Note:** Each download report of any type that you save is named "data.csv" by default. When you save the file, you should give it a unique identifying name; for example, "interactionsMarch05.csv."

**Setting and removing report filters**

Where appropriate, you can further define the information for a particular downloadable report by using report filters. For information about these filters, including the implications of applying them and the procedures for setting them, see “Setting and removing report filters” on page 25.

**Interactions**

This reports on user access. A unique transaction ID is generated each time a user accesses an object. The Interactions report uses the data listed in the following table:

<table>
<thead>
<tr>
<th>Column name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>transaction-id</td>
<td>Unique ID for this transaction.</td>
</tr>
<tr>
<td>name</td>
<td>Object name as it appears in the content listing.</td>
</tr>
<tr>
<td>url</td>
<td>Object that the user accessed.</td>
</tr>
<tr>
<td>principal-id</td>
<td>Unique ID for the user.</td>
</tr>
<tr>
<td>login</td>
<td>Name of user who accessed this transaction.</td>
</tr>
<tr>
<td>user-name</td>
<td>Unique user name.</td>
</tr>
<tr>
<td>score</td>
<td>How the user scored.</td>
</tr>
<tr>
<td>status</td>
<td>Status of transaction: passed, failed, complete, or in-progress.</td>
</tr>
<tr>
<td>date-created</td>
<td>Date this transaction was taken or viewed.</td>
</tr>
</tbody>
</table>

The following user actions generate data in this view:

- Attending a meeting
- Attending a seminar
- Viewing a piece of content
- Taking a course
- Taking a curriculum
Constraints

The Interaction report excludes the following information:

- Certificate number, which does not exist in the database
- Max score, which is often unavailable

Users

This report lists users and associated profile attributes using data listed in the following table:

<table>
<thead>
<tr>
<th>Column name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>principal-id</td>
<td>Unique ID for the user</td>
</tr>
<tr>
<td>login</td>
<td>Unique user identifier.</td>
</tr>
<tr>
<td>name</td>
<td>Unique user name.</td>
</tr>
<tr>
<td>email</td>
<td>User’s unique e-mail address.</td>
</tr>
<tr>
<td>manager</td>
<td>The login of the user’s manager. Manager is always set to NULL.</td>
</tr>
<tr>
<td>type</td>
<td>User or guest. Type is always set to user.</td>
</tr>
</tbody>
</table>

Data is generated in this view whenever a user creates, updates, or deletes a user.

Constraints

The Users report excludes the following information:

- Password, which is not stored in plain text.
- Time zone and language, which are not available in human readable form; for example, PST is 323.

Note: Deleted users do not appear in the Users report. Deleted users continue to exist in the Interactions report.
Assets

This a description of all Breeze resources, such as meetings, events, content, and seminars. This report lists all system objects (such as meetings, content, courses, and so on) and their attributes, as the following table shows:

<table>
<thead>
<tr>
<th>Column name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>url</td>
<td>Unique identifier for the object.</td>
</tr>
<tr>
<td>type</td>
<td>Either a presentation, course, FLV file, SWF file, image, archive, meeting,</td>
</tr>
<tr>
<td></td>
<td>curriculum, folder, or event.</td>
</tr>
<tr>
<td>name</td>
<td>Object name as it appears in the content listing.</td>
</tr>
<tr>
<td>date-created</td>
<td>Date on which the object is scheduled to begin.</td>
</tr>
<tr>
<td>date-end</td>
<td>Date on which the object is scheduled to end.</td>
</tr>
<tr>
<td>date-modified</td>
<td>Date this object was modified.</td>
</tr>
<tr>
<td>description</td>
<td>Object summary information entered when creating a new meeting, content,</td>
</tr>
<tr>
<td></td>
<td>course, or other object type.</td>
</tr>
</tbody>
</table>

Data is generated in the Asset report whenever a user does any of the following:

- Creates a meeting, event, seminar, curriculum, or course
- Uploads content

Questions

This report is a list of polling questions and quiz interactions within all the Breeze applications, including event registration questions. The Questions report retrieves data from meeting polls, user forms, and quizzes, as the following table shows:

<table>
<thead>
<tr>
<th>Column name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>transaction-id</td>
<td>Unique ID for this transaction.</td>
</tr>
<tr>
<td>question</td>
<td>Text of the question.</td>
</tr>
<tr>
<td>response</td>
<td>User’s response to the question.</td>
</tr>
<tr>
<td>score</td>
<td>Number of points awarded for the response.</td>
</tr>
<tr>
<td>principal-id</td>
<td>Unique ID for the user</td>
</tr>
<tr>
<td>date-created</td>
<td>Date the record was created</td>
</tr>
</tbody>
</table>

A multiple-answer question is returned as one row for every answer chosen. For example, when the user answers 1 and 4, there are two separate rows. One row contains the value 1 and the other row contains the value 4.
Data is generated in this report whenever a user does any of the following:

- Answers a question in a quiz within a course or curriculum
- Answers a registration question
- Answers a poll within a meeting or seminar
- Adds a custom form to a meeting, seminar, course, or curriculum

Constraints

The Question report excludes the following information:

- Correct or Incorrect, which can be determined by checking for a non-zero score
- Date answered, which does not exist in the version 410 schema

Slide Views

This report is a history of slide views within Breeze. It provides data about the slides or pages viewed by users. The Slide Views report uses the data listed in the following table:

<table>
<thead>
<tr>
<th>Column name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>transaction-id</td>
<td>Unique ID for this transaction.</td>
</tr>
<tr>
<td>page</td>
<td>Slide or page number that was viewed.</td>
</tr>
<tr>
<td>date-created</td>
<td>Date this view occurred.</td>
</tr>
<tr>
<td>principal-id</td>
<td>Unique ID for the user.</td>
</tr>
</tbody>
</table>

Data is generated in this view whenever a user views content or a course or curriculum.
Custom URL Management

Breeze allows the creation of custom URLs for meetings, training, events, or seminars. A custom URL is reusable and easy to remember. This name is appended to the domain name of your Breeze server, and is created when a user sets up a meeting, training, event, or seminar. A custom URL is recyclable; that is, it becomes available if the item to which it was initially assigned is subsequently deleted.

Users might want to use custom URLs that correspond to their first names, or ones that are meaningful for the organization, so it is possible that multiple users might enter the same URL when they set up a particular function. If the name is already in use, an error message appears.

You can use the Custom URL Management feature to find and report on the owner and attributes of a specific custom URL.

To use the Custom URL search:
1. Click the Administration tab.
2. Click Reports.
   The Report page appears, with links to the different Administration reports.
3. Click Custom URL Management.
   The Custom URL Management page appears.
4. Enter the name that you are searching for in the Search For text box and click Search.

The page displays the Content Information report, which provides the following information:

- **Title**, the title of the meeting, content, course, curriculum, seminar, or event that is using this URL.
- **Type**, the type of function this URL is currently being used for (meeting, content, training, and so on).
- **User**, the individual who is currently using the URL.
- **URL**, the full path of which this custom URL is part.
- **Date Created**, the date and time the function using this URL was created.
- **Date Modified**, the date and time the function using this URL was modified, if any. If it was never modified, this is the same as the Date Created.
Macromedia Breeze is a permissions-based application. The permissions structure protects the integrity of Breeze data and defines the parameters of each user's access. In Breeze, every user account is defined by its access permissions to the application's various information repositories and features. The Breeze administrator's job is to create, add, remove, and manage Breeze accounts, both for individual users and groups. The administrator performs these functions using the Administration tab, which is not available to other Breeze users.

To access the user management functions of Macromedia Breeze Manager, click the Administration tab at the top of the Breeze Manager window, and then click the Users and Groups link below the tab names.

Breeze permissions architecture

Breeze information is stored in libraries, each of which is associated with a different activity and application, and each application is represented by its own tab on Breeze Manager. You only see the tabs for the applications that your organization purchased. The libraries are Content, Training, Meetings, Seminar, and Event.

Regardless of your configuration, however, each file and folder in all of your Breeze libraries has different access permissions for different users. This is the basis of how setting permissions works in Breeze; that is, access to any file or folder is tied to the file or folder itself. These folder and file permissions are set in one of the following ways:

- By the creator of the folder or file
- By the Breeze administrator
- By default to members of Built-in groups (see “Built-in groups” on page 259)

The permissions associated with a specific file or folder are called its permission profile.

Although there are four types of permissions that apply across all the Breeze libraries, not all the libraries have the same combination of these permissions, so you must be aware of the permission set that applies to each library. For a description, see “Library activities and their permissions” on page 264.
In addition, there is another set of permissions that you can assign to a file or folder; these are the attendance permissions. The attendance permissions designate the access permissions and the role of each attendee in a meeting, training, event, or seminar. The Breeze library permission types address who can manage library files. The attendance permissions designate what role an attendee plays in a specific Breeze meeting, training, event, or seminar, and who can view Breeze library content. The attendance roles are defined by the user who creates the meeting, training, event, seminar, or content.

As an administrator, you might be less involved with this type of permission set. For a description of the participation types, see “Breeze attendance permissions” on page 257.

Breeze library folders

With the exception of the Seminar library (see “Seminar library folders” on page 256), each Breeze library has two high-level folder directories, Shared folders and User folders. Their usage is as follows:

- **Shared folders.** When Breeze is installed, only the administrator has access privileges to the Shared folders. As the administrator, you can assign permissions for the Shared folders in any way appropriate to your particular organization. However, although you can assign Manage permissions for a Shared folder to any Breeze user, only members of the Built-in group associated with that library can create new occurrences of the corresponding library’s functions within the folder. For example, in the Meetings library, although any user with Manage permissions for a specific Shared Meetings folder can manage this folder, only meeting hosts can create new meetings in it. For information on Built-in groups, see “Built-in groups” on page 259.

- **User folders.** When you assign members to a specific Built-in group, Breeze automatically creates a user folder for each individual in the library associated with that group. For example, any user you assign to the meeting host group, automatically receives his or her own folder in the User Meetings folder in the Meetings library. It is this folder the user sees when accessing the Meetings tab. Users can manage their user folders in whatever way they want, including setting permissions that give other users access privileges to the folders, but users can only do this for their own folders, unless the administrator or another user with Manage permissions for another folder has assigned them Manage privileges for that folder.

Seminar library folders

Seminar library folders have a different structure than the other folders. There are no user folders in this library; instead, each folder represents a different seminar license that your organization purchased. When you assign a user to the Seminar Host group, this user automatically has Manage permissions for all Seminar Rooms folders; such a user can add and delete seminars, and assign Manage permissions to other seminar hosts. Like other Shared folders in other libraries, anyone with Manage permissions can manage a Seminar Rooms folder, but only a seminar host can create new seminars in this folder.
Breeze library folder permissions

Breeze library folder permissions determine who can perform routine file and folder maintenance for a given library. For details on these, as well as tables that list the permissions possible for each task in the Breeze libraries, see “Library activities and their permissions” on page 264.

Breeze attendance permissions

Each of the Breeze libraries is associated with a different structure for presenting information to different audiences. This means that there are different roles for the individuals who are presenting the information and for those who are receiving it. The following sections describe the different participation permissions for each application:

- “Meetings application attendance permissions” on page 257
- “Content application attendance permissions” on page 257
- “Training application attendance permissions” on page 258
- “Seminars application attendance permissions” on page 258
- “Events application attendance permissions” on page 258

Meetings application attendance permissions

The following attendance permissions are associated with the Meetings application:

**Host**  
A host sets up meetings, invites guests, adds content from the Content library, customizes the meeting room layout, and assigns presenter and participant roles to the appropriate attendees. The host can also perform all the tasks that presenters can.

**Presenter**  
A presenter can share the desktop, windows, and applications, text chat, broadcast live audio and video, and show content to the participants. However, the presenter does not have access to the Content library.

**Participant**  
A participant can view the content that the presenter is showing or sharing, hear and see the presenter's audio and video broadcast, use text chat, and broadcast audio and video, if given permission.

*Note:* Administrators have host permissions for all meetings by default.

Content application attendance permissions

There is not a separate set of attendance permissions for the Content library. These permissions correspond to those assigned for the file or folder; for a description of these, see “Breeze library permission types” on page 264. After a piece of content is placed in the Content library, it can be accessed by all the other applications or publicly viewed.
Training application attendance permissions

The Training application has two components, courses and curriculums. Both components have two attendance permissions, Enrolled and Denied. Enrolled indicates a learner whom a training manager placed in a course or curriculum; Denied indicates a user who is denied access to that course or curriculum, usually when a whole group is enrolled, but the training manager wants to exclude the specific member. (For example, in a situation where the member already took a course that the rest of the group still must take.) In this case, the training manager is using the principle of multiple permissions precedence; for details, see “Multiple permissions precedence” on page 269.

Seminars application attendance permissions

The attendance permissions for seminars are the same as those for meetings; see “Meetings application attendance permissions” on page 257.

Events application attendance permissions

Events require registration, and some of the permissions apply to the status of the registration. The attendance permissions are the same as those for meetings; see “Meetings application attendance permissions” on page 257. The event status permissions are as follows:

- **Invited**  A permission that applies to an individual who the event manager invited but who has not yet registered.
- **Denied**  A registration status that applies to an individual whose registration was denied by the event manager.
- **Pending Approval**  A registration status that applies to an individual whose registration is not yet approved by the event manager.

Types of groups and group permissions

As an administrator, you are responsible for setting up individual users with Breeze accounts, and assigning them to groups.

Whenever possible, it is best practice to assign users to groups, and then assign permissions only at the group level instead of the individual level. Although this means that you must create groups, account administration is simpler when you are managing groups rather than individuals.

You can create and use groups to do the following:

- Assign groups of users Manage permissions for various folders in the Content, Training, Meetings, Event, and Seminar libraries.
- Assign groups of users View permissions for folders in the Content library.
- Assign groups of users, who are also authors, Publish permissions for folders in the Content library.

There are two kinds of groups: Built-in groups and custom groups.
Built-in groups

Breeze is installed with six Built-in groups, each reflecting a specific set of access needs across all the Breeze libraries. The administrator, at the company level, assigns users and groups to the appropriate Built-in groups. Membership in a specific Built-in group enables you to create new instances of the function associated with that library; that is, new files. For example, if you are a meeting host, you can create new meetings.

The permissions set for Built-in groups cannot be changed, and the administrator can assign specific individuals to more than one of these groups. In such cases, it’s possible that this can cause a conflict between types. For example, one of the groups to which the user or group is assigned may be denied permission for a specific folder, whereas the other group to which they belong lets them manage that folder. To address this conflict, there are rules for permission precedence (see “Multiple permissions precedence” on page 269).

With the exception of the administrator, the only default Manage permissions a Built-in group member has is for their personal user folder. These are user folders automatically assigned to Built-in group members for their associated library; see “Breeze library folders” on page 256. However, Built-in group members cannot access the Shared folder directory of the library they’re associated with unless you assign them Manage permissions. If you do, they can also create new instances of their associated function: meetings, courses, events, and so on because they belong to the corresponding Built-in group for that library. You can also assign Manage permissions for a folder in the Shared folder directory to other users who are not part of that library's Built-in group. But whereas they can Manage folders, they cannot create anything in that library, because they are not part of that library's Built-in group.

The Built-in groups are as follows:

- Administrator; see “Administrators” on page 259
- Author; see “Authors” on page 260
- Training manager; see “Training managers” on page 261
- Event manager; see “Event managers” on page 261
- Meeting host; see “Meeting hosts” on page 262
- Seminar host; see “Seminar hosts” on page 263

Administrators

Administrators have complete control of the entire Breeze system. You can make any user an administrator by adding them to the Administrator group. For information on adding users to groups, see “Assigning a user to a group” on page 290 or “Adding members to a group” on page 294.

An administrator can perform the following actions:

- Manage the users and groups in Breeze account, including creating, deleting, and editing them.
- Manage the Content library, including viewing, deleting, moving, and editing Content library files or folders, viewing reports for Content library files, setting permissions for Content library files or folders, and creating new subfolders within Content library folders.
• Manage the Training library, including viewing, deleting, moving, and editing Training library files or folders, viewing reports for Training library files, setting permissions for Training library files or folders, and creating new subfolders within Training library folders, as well as enrolling users, sending enrollee notifications, and setting up course and curriculum reminders.

• Manage the Meetings library, including viewing, deleting, moving, and editing Meetings library files or folders, viewing reports for Meetings library files, setting permissions for Meetings library files or folders, and creating new subfolders within Meetings library folders, as well as adding participants.

• Manage the Event library, including viewing, deleting, moving, and editing Event library files or folders, viewing reports for Event library files, setting permissions for Event library files or folders, and creating new subfolders within Event library folders, as well as adding participants, sending invitations, and changing content and e-mail options.

• Manage the Seminar library, including viewing, deleting, moving, and editing Seminar library files or folders, viewing reports for Seminar library files, setting permissions for Seminar library files or folders, and creating new subfolders within Seminar library folders, as well as adding participants.

• View account information, account features, account quotas, and account reports, and, if your organization has purchased this option, customize the look of Breeze for your organization (see Chapter 18, “Managing the Breeze Account,” on page 237).

In addition, by default, the administrator has Host permissions for every meeting.

Users who are members of the Administrator group have permission to do everything except the following:

• Publish content
• Create new meetings
• Create new courses or curriculums
• Create new seminars
• Create new events

Permissions for members of the Administrator group cannot be overridden with individual or other group permissions. For more information, see “Multiple permissions precedence” on page 269.

Authors

Authors can publish or upload content, including Macromedia Breeze Presentations, to the Content library. To do so, a user must be a member of the Authors group. To publish presentations to a specific folder, a user must be a member of the Authors group and have Publish permissions for that folder.

If you assign a user to this group, Breeze creates a folder for this user in the User folder of the Content library (the shortcut called My Content points to this folder). By default, a member of the Author group has both Publish and Manage permissions only for their own My Content folder.
Your Breeze account has a limit on the number of users that you can add to the Author group. To view your author limit, see “About your organization’s Breeze account” on page 237.

Members of the Author group can perform all of the following actions if they have Publish permissions on the specified folder:

- View content and content folders.
- Publish and update content.
- Send e-mail messages containing links that send a notification to the author as soon as the recipient accesses the link.

Training managers

As users who are responsible for training, training managers are associated with the Training library. You can make any user a training manager by adding the user to the Training Manager group. For information on adding users to groups, see “Assigning a user to a group” on page 290 or “Adding members to a group” on page 294.

If you assign a user to this group, Breeze creates a folder for this user in the User folder of the Training library, which has a shortcut pointing to it called My Training. By default, training managers can manage only their own folder in the User Training folder.

A training manager can perform the following actions:

- Manage his or her own user folder in the Training library, including all Training library file management functions, as well as create and manage courses and curriculums, enroll users, send enrollee notifications, and set up reminders.
- View training reports for the courses or curriculums that the training manager created.

If a user belongs to the Training Manager group but you do not want this user to have all the permissions that go with that group, as an administrator you can place more restrictive permissions on the individual user or on a group to which the user belongs. For more information, see “Multiple permissions precedence” on page 269.

Event managers

Event managers can create events and manage their own folders in the Event library. You can make any user an event manager by adding the user to the Event Manager group. For information on adding users to groups, see “Assigning a user to a group” on page 290 or “Adding members to a group” on page 294.

If you assign a user to this group, Breeze creates a folder for the user in the User folder of the Event library. This group can only manage their individual My Events folder in the User Events folder. They also can manage any events in the Shared folders of the Events library, if they are the host of the event that they want to modify, and they have Manage permissions for the folder that contains the event.
An event manager can perform the following actions:

- Manage his or her own Event library user folder, including all file management functions, and create and manage all aspects of an event in this folder
- View event reports

If a user belongs to the Event Managers group but you do not want the user to have all the permissions that go with that group, you can place more restrictive permissions on the individual user or on a group to which the user belongs. For more information, see “Multiple permissions precedence” on page 269.

Meeting hosts

Meeting hosts create meetings, and as such are associated with the Meetings library. You can make any user a meeting host by adding them to the Meeting Host group. For information on adding users to groups, see “Assigning a user to a group” on page 290 or “Adding members to a group” on page 294. For more information on the structure of the Meetings library, see “Structure of the Meetings library” on page 143.

If you assign a user to the Meeting Host group, Breeze creates a folder for this user in the User folder of the Meetings library. This group can only manage their individual My Meetings folder in the User Meetings folder. In addition, they can manage any meetings in the Shared folders of the Meetings library, if they have Manage permissions for that folder and are also the host of the meeting they want to modify.

A meeting host can perform the following actions:

- Manage their individual User Meetings folder, including file management functions and create and manage meetings, which involve adding, deleting, and assigning attendance permissions to presenters and participants; creating and organizing meeting rooms; and editing a meeting or changing its participant list
- View meeting reports
- Create content
- View content and content folders for which you have permission to access
- Publish and update content

If a user belongs to the Meeting Host group but you do not want this user to have all the permissions that go with that group, you can place more restrictive permissions on the individual user or on a group to which the user belongs. For more information, see “Multiple permissions precedence” on page 269.
Seminar hosts

Because of the way seminars are licensed, the permissions for seminar hosts are different from other groups.

Unlike other libraries, the Seminar library does not have a high-level User folder prepopulated with folders for the individual hosts. Instead, the Seminar library consists only of the Shared folder directory, and each folder in this directory corresponds to a seminar license that your organization purchased. No users except seminar hosts and administrators can manage these folders. This is different from other libraries’ Shared folder permissions, where the administrator can assign Manage permissions to users who are not part of the Built-in group associated with the library. Another difference is that unlike other libraries, a seminar host can manage all the folders in the Seminar library.

A seminar host can perform the following actions:

- Manage all Seminar library folders, including file management functions and create and manage seminars, which involve adding, deleting, and assigning attendance permissions to presenters and participants; creating and organizing seminar rooms; and editing a seminar or changing its participant list
- View seminar reports

Built-in groups permission

The following table shows the permissions for each group’s access to each of the Breeze libraries:

<table>
<thead>
<tr>
<th>Group</th>
<th>Content library</th>
<th>Training library</th>
<th>Meetings library</th>
<th>Seminar library</th>
<th>Events library</th>
<th>Additional permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>Everything but Publish</td>
<td>Manage</td>
<td>Manage</td>
<td>Manage</td>
<td>Manage</td>
<td>Manage users, groups, and accounts; view all users’ content folders</td>
</tr>
<tr>
<td>Author</td>
<td>Publish/Manage</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Training Manager</td>
<td>None</td>
<td>Manage</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Meeting Host</td>
<td>None</td>
<td>None</td>
<td>Manage</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Event Manager</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>Manage</td>
<td>None</td>
</tr>
<tr>
<td>Seminar Host</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>Manage</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
Custom groups

Custom groups are groups that you create yourself. You can define specific folder and file permissions for the group within the different Breeze libraries. In addition, because a group can contain both users and other groups, you can assign permissions to a custom group by assigning it to the appropriate Built-in groups.

As an example of how you can set up custom groups, you can create a group called Global that contains a group for each country in which your company has an office (for instance, United States, Germany, and so on). Each country group can contain a group for each office in that country (for example, San Francisco, Boston, and so on). Within each of these offices, you can define more groups by job function, and then assign each of these groups the appropriate Built-in group designations.

In this example, you created a hierarchical set of groups called nested groups, because each group is contained within the one above it in the hierarchy. By default, the nested groups have the permissions of the parent group, but you can expand or restrict these by setting custom permissions for these groups in the relevant libraries. For information on expanding and restricting permissions, see “Multiple permissions precedence” on page 269; for information on assigning permissions to custom groups, see “Setting custom permissions for the Breeze libraries” on page 285.

Library activities and their permissions

Every library has its own set of permissions, as well as its own set of tasks. This section describes both the permissions and the tasks associated with them.

Breeze library permission types

There are four types of permissions. Each library has a combination of two or more of these types that form a permission set applicable to that library. The types are as follows:

Manage Users or groups with a Manage permission setting for a folder or file can view, delete, move, and edit the file or folder, view reports for files in that folder, set permissions for the file or folder, and create new subfolders within that folder. However, they cannot create new files within a folder unless they are also members of the Built-in group associated with that folder’s library; see “Built-in groups” on page 259. Creating a new file is the same as creating a new instance of the function associated with a library; for example, you can only create a new file in a meetings folder when you create a new meeting.

Publish Users or groups with a Publish permission setting for a folder or presentation can publish, update, and view content, as well as view reports. Users with Publish permissions for a folder cannot create new subfolders within it or set permissions for it unless they also have Manage permissions for it.
Users or groups with a View permission setting for a folder can view any content in that folder. A View permission for an individual file allows view access for that particular file.

Users or groups with a Denied permission setting for a folder or file cannot view it, access it, or manage it in any way.

For detailed information on each task that can be performed within a given library and its associated permissions, see “Library tasks and their permissions” on page 265.

Library tasks and their permissions

The following tables list the task associated with each Breeze library and which permission types can perform the task. Use these tables to understand the permissions necessary for a given user’s job responsibilities within the different libraries when assigning this user to a Built-in or custom group. For tips on assigning permissions to users and groups, see “Tips on working with permissions” on page 271. The tables are as follows:

- “Content library” on page 265
- “Meetings library” on page 267
- “Event library” on page 269
- “Seminar library” on page 268
- “Event library” on page 269

Content library

A summary of Content library functionalities allowed for each permission type is shown in the following table:

<table>
<thead>
<tr>
<th>Functionality</th>
<th>Denied</th>
<th>View</th>
<th>Publish</th>
<th>Manage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigate/search content folders</td>
<td>none</td>
<td>enabled</td>
<td>enabled</td>
<td>enabled</td>
</tr>
<tr>
<td>View content file information</td>
<td>none</td>
<td>enabled</td>
<td>enabled</td>
<td>enabled</td>
</tr>
<tr>
<td>View content files</td>
<td>none</td>
<td>enabled</td>
<td>enabled</td>
<td>enabled</td>
</tr>
<tr>
<td>Publish/update presentations</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
<td>enabled</td>
</tr>
<tr>
<td>Add content</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
<td>none</td>
</tr>
<tr>
<td>Move content files</td>
<td>none</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Delete content files</td>
<td>none</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Edit content file information</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
<td>enabled</td>
</tr>
<tr>
<td>Send e-mail messages containing links that send return receipts</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
<td>enabled</td>
</tr>
<tr>
<td>Download content</td>
<td>none</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Set content file permissions</td>
<td>none</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Create content folders</td>
<td>none</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
</tr>
</tbody>
</table>

* Must be a member of the Administrators group.
## Training library

A summary of Training library functionalities allowed for each permission type is shown in the following table:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Denied</th>
<th>View</th>
<th>Publish</th>
<th>Manage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move content folders</td>
<td>none</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Delete content folders</td>
<td>none</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Set content folder permissions</td>
<td>none</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View reports</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
<td>enabled</td>
</tr>
<tr>
<td>View My Content</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
<td>enabled</td>
</tr>
<tr>
<td>View Users Content*</td>
<td>none</td>
<td>none</td>
<td>none</td>
<td>enabled</td>
</tr>
</tbody>
</table>

* Must be a member of the Administrators group.
Meetings library

A summary of Meetings library functionalities allowed for each permission type are shown in the following table:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Denied</th>
<th>Manage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigate meetings folders</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View meeting summaries</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View and edit meetings’ participants lists</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View and manage meetings’ uploaded content lists</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View and manage meetings’ recordings lists</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Create new meetings</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Move meetings</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Delete meetings</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Edit meeting information</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Change meeting participants</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Send meeting invitations</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Move uploaded content to the Content library</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Delete uploaded content</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Move meeting recordings to the Content library</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Delete meeting recordings</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Create meeting folders</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Move meeting folders</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Delete meeting folders</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Set meeting folder permissions</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View meeting reports</td>
<td>none</td>
<td>enabled</td>
</tr>
</tbody>
</table>
Seminar library

A summary of Seminar library functionalities allowed for each permission type are shown in the following table.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Denied</th>
<th>Manage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigate seminar folders</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View seminar summaries</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View and edit seminar participants lists</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View and manage seminar uploaded content lists</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View and manage seminar recordings lists</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Create new seminars</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Move seminars</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Delete seminars</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Edit seminar information</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Change seminar participants</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Send seminar invitations</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Move uploaded content to the Content library</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Delete uploaded content</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Move seminar recordings to the Content library</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Delete seminar recordings</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Create seminar folders</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Move seminar folders</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Delete seminar folders</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Set seminar folder permissions</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View seminar reports</td>
<td>none</td>
<td>enabled</td>
</tr>
</tbody>
</table>
**Event library**

A summary of Event library functionalities allowed for each permission type are shown in the following table.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Denied</th>
<th>Manage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigate event folders</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View and edit event summaries</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View and edit event participants and e-mail lists</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View and edit event registration page and questions</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Create new events</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Create registration page and questions</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Manage participants, which includes:</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>• Adding Breeze users</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Adding non-Breeze users</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Importing guest lists in CSV format for mass mailings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Sending e-mail invitations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit e-mail options</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Send e-mail invitations and other event-related e-mail messages</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Move events</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Delete events</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Edit event information</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Approve/deny event participants’ entry</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Change event content</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Create event folders</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Move event folders</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Delete event folders</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>Set event folder permissions</td>
<td>none</td>
<td>enabled</td>
</tr>
<tr>
<td>View event reports</td>
<td>none</td>
<td>enabled</td>
</tr>
</tbody>
</table>

**Multiple permissions precedence**

If a user belongs to one or more groups, it is possible that multiple permissions apply to a single file or folder. In such a case, the user’s permissions are resolved as follows (higher numbered steps take precedence):

1. If the user acquires View, Publish, or Manage permissions through group-acquired permissions, the permission granting the greatest access to features applies. These three group permissions are additive.

2. If the user acquires any Denied permission through group-acquired permissions, all group-acquired View, Publish, or Manage permissions are removed and the user is not allowed access.
3. If the user acquires View, Publish, or Manage permissions through user-specific permissions, these are additive to the corresponding group-acquired permissions. In addition, these override any group-acquired Denied permission.

4. If the user is specifically assigned the Denied permission setting through user-specific permissions, the user is denied access regardless of any group-acquired permissions.

5. If the user is a member of the Administrator group, the administrator permission applies, regardless of any other individual or group setting.

6. If there are no permissions applied by either user or group (and none is inherited from a parent folder), the user cannot access or perform any actions on the folder or file.

The following table illustrates the way that group and user permissions apply:

<table>
<thead>
<tr>
<th>Group G1 permissions</th>
<th>Group G2 permissions</th>
<th>Union (G1, G2) permissions</th>
<th>User permissions</th>
<th>Resulting permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Publish</td>
<td>Publish</td>
<td>Manage</td>
<td>Publish+Manage</td>
</tr>
<tr>
<td>Manage</td>
<td>None</td>
<td>Manage</td>
<td>Publish</td>
<td>Publish+Manage</td>
</tr>
<tr>
<td>Denied</td>
<td>Publish</td>
<td>Denied</td>
<td>Manage</td>
<td>Manage</td>
</tr>
<tr>
<td>View</td>
<td>Manage</td>
<td>Manage</td>
<td>View</td>
<td>Manage</td>
</tr>
<tr>
<td>Manage</td>
<td>None</td>
<td>Manage</td>
<td>Denied</td>
<td>Denied</td>
</tr>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

Here are some facts to keep in mind about permission precedence:

**Setting user permissions** Keep in mind that user-specific permissions are additive to the corresponding group-acquired permissions and override any group-acquired Denied permissions. Individual Denied permissions also override any group-acquired permissions.

User permissions take precedence over all group-acquired permissions. For example, to ensure that a specific user gets Manage permission for a content presentation, you can set the Manage permission for that specific user. This permission always applies, regardless of any other group permissions that are set.

**Setting group permissions** Use group permissions to set rules for groups of users.

**Ensuring that access is denied** To ensure that access is denied, the Denied permission must be set for the specific user. This permission overrides any group-acquired permissions.

**Ensuring access** To ensure that a specific user is given at least Publish permission for a given content presentation, you must set their user-specific permission to Publish. Any group-acquired permissions are only additive; they cannot deny access.
Tips on working with permissions

By assigning groups or users certain permission types for a file or folder, you can control which users or groups can access certain features for that folder. For example, you can set a folder’s permissions so that only certain users or groups can publish content to the folder. You can also set a folder to have the same permission as its parent folder. If the parent folder’s permissions change, the underlying content that was assigned to use the parent folder’s permissions changes as well. To create or assign permissions for a file or folder, you must first navigate to the library’s tab and open the file or folder from there.

To avoid listing and managing large numbers of users on the permission profile for a file or folder, you should use a group-based permission system. Create your system as follows:

**Design a folder and group system** so that certain groups can be given permissions for parts of the system as appropriate.

**Create folders using descriptive names** that describe the folder’s contents—for example, Human Resource Content, Product Support Content, and so on. For more information on creating folders, see “Creating a content folder” on page 45, “Creating a training folder” on page 112, “Creating an event folder” on page 230, “Creating a seminar folder” on page 189, and “Creating a meeting folder” on page 152.

**Create groups using descriptive names** that describe the group’s permissions—for example, Human Resource Content Managers, Shared Content Viewers, and so on. For more information, see “Creating a custom group” on page 281.

**Assign permission types for your groups to specific folders or files**. For example, assign the Human Resource Content Managers group permission to manage the Human Resources folder in the Shared Content folder. For more information, see “Setting custom permissions for the Breeze libraries” on page 285.

**Create users after you have created groups**. For more information, see “Creating a new user manually” on page 282.

**Add users to groups**. Add users to whichever groups are necessary for them to obtain appropriate permissions. For more information, see “Assigning a user to a group” on page 290.

If you must set up exceptions such as denying access to certain folders for a specific user, you can assign a user-based permission setting that takes precedence over the group permission, ensuring that access is prevented. User-assigned permissions always take precedence over group-assigned permissions (except for members of the administrators group); see “Multiple permissions precedence” on page 269.

For information on setting permissions for files and folders in the different Breeze libraries, see “Setting custom permissions for the Breeze libraries” on page 285.
Customizing user profile fields

A user profile field is an attribute of your organization’s Breeze user profile. The Customize User Profile feature in Breeze Manager lets you access these fields in three ways:

• By selecting one or more components from the default list that Breeze provides
• By selecting additional components from a list of predefined fields
• By creating your own custom components

The fields for First Name, Last Name, and E-mail are all required for Breeze; you cannot select, remove, or modify these. However, you can modify any other existing field to designate it as required and to include a descriptive comment, and do the same for any new fields that you create. You can also move a component up or down in the profile list, depending on its importance.

To customize the user profile for your organization, use the Customize User Profile link and refer to the appropriate procedure:

• To select predefined user fields, see “Selecting user profile fields” on page 272.
• To add predefined user fields, see “Adding a predefined field” on page 273.
• To create your own user profile fields, see “Creating a custom user profile field” on page 273.
• To change, add a descriptive comment to, or flag a field as required, see “Modifying a user profile field” on page 274.
• To delete a user field, see “Importing a user CSV file (create new users)” on page 277.

Selecting user profile fields

Use the following procedure if all the fields you must add are on the first Customize User Profile page.

To select user profile fields:

1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The Users and Groups list appears.
3. Click the Customize User Profile link above the Users and Groups list.
   The list of the user profile fields appears; First Name, Last Name, and E-mail are flagged with red asterisks (*) to indicate that they are required.
4. Select the check box for any field on this page that you want to include as part of the Breeze account profile.
5. To move an item up or down in the list, select its check box and click the Shift Up or Shift Down button, as appropriate.
6. To flag this field as required or add a description for it, see “Modifying a user profile field” on page 274.
Adding a predefined field

You can select and add a predefined field from a list that Breeze provides.

To add a predefined field:
1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The Users and Groups list appears.
3. Click the Customize User Profile link above the Users and Groups list.
   The list of the user profile fields appears.
4. Click the Add Predefined Field button.
   A list of additional predefined fields appears.
5. Click the check box for any fields that you want to add.
6. Click Save.
   The main (first) Customize User Profile list page reappears with the items that you added.
7. To move an item up or down in the list, select its check box and click the Shift Up or Shift Down button, as appropriate.
8. To flag this field as required or add a description for it, see “Modifying a user profile field” on page 274.

Creating a custom user profile field

You can create a field that does not appear on the main Customize User Profile page or in list of predefined user profile fields.

To create a custom field:
1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The Users and Groups list appears.
3. Click the Customize User Profile link above the Users and Groups list.
   The list of the user profile fields appears.
4. Click the New Field button.
   The New Field page appears.
5. Do the following:
   a (Required) Type a name for this field.
   b (Optional) Type a comment in the Comment text input box.
   c (Optional) Select the Required check box for the Field Type if you want this field to be required.
6. Click Save.
   The main (first) Customize User Profile list page reappears with the items that you added.
7. To move an item up or down in the list, select its check box and click the Shift Up or Shift Down button, as appropriate.

8. To flag this field as required or add a description for it, see “Modifying a user profile field” on page 274.

Modifying a user profile field

You can change any attributes of an existing field, set a Required field, or add a comment for a field that you just selected.

To modify a user profile field:
1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The Users and Groups list appears.
3. Click the Customize User Profile link above the Users and Groups list.
   The list of the user profile fields appears.
4. Click the name of the field that you want to modify to open it.
   The Edit Field page appears.
5. Do any of the following, as appropriate:
   a. Change the field name (this is a required field; you cannot delete the name, only change it).
   b. Type, change, or delete a comment in the Comment text input box.
   c. Select or deselect the Required check box for the Field Type.
6. Click Save.
   The main (first) Customize User Profile list page reappears with the changes you have made.

Removing a user profile field

You can remove any user profile field except First Name, Last Name, and E-mail, which are required for Breeze.

To remove a user profile field:
1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The Users and Groups list appears.
3. Click the Customize User Profile link above the Users and Groups list.
   The list of the user profile fields appears.
4. Select the check boxes for the fields that you want to remove.
5. Click Remove.
   The remove confirmation page appears, listing the names of the fields you selected for removal, and asking if these are the items that you want to permanently delete.
6. Check that the fields shown on this page are the ones that you selected for removal.
7. Do either of the following, as appropriate:
   ■ Click Remove to delete these fields.
   ■ Click Cancel to cancel the operation.

The main (first) Customize User Profile list page reappears. If you removed the fields, they are no longer in the list; if you canceled the operation, the fields are still listed.

**Managing login and password parameters**

The Edit Login and Password Policies link on the Breeze Manager Administration tab lets you customize your login and password policies to conform to those of your company. Any policies you establish are unique across the entire Breeze application.

**Login policy** You can specify whether the Breeze login should be the same as the user’s e-mail address. The login must be unique for each user.

**Password expiration** You can specify how long a password is valid. If you do not enter a value, passwords do not expire.

**Password format** You can include a special character that is mandatory in all passwords, as well as specify whether the password must contain a number or a capital letter.

**Password length** You must specify a minimum or maximum number of characters, each of which must be between 4 and 16 characters long.

To edit Breeze login and password policies:
1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The Users and Groups list appears.
3. Click Edit Login and Password Policies.
   The Edit Login and Password Policies page appears.
4. Make any changes as appropriate.
5. Click Save.
   The Users and Groups list reappears.

**Breeze account creation workflow**

Before you set up new Breeze users or groups in the system, you must first set up your account parameters. This includes defining which attributes you want to include as part of Breeze user profiles (see “Customizing user profile fields” on page 272), as well as defining the Breeze login and password policies to conform with those of your organization (see “Managing login and password parameters” on page 275).

After you define your account parameters, you can proceed to create accounts for the company’s users and groups.
There are three ways to add users and groups to Breeze:

- Using the Lightweight Directory Access Protocol (LDAP), used for large organizations. If your company supports LDAP, you would probably not be involved in adding new users or groups, as this is maintained outside of Breeze Manager functionality. However, you might have to work with your corporate IT department to determine user and group mappings within Breeze. For more details about LDAP, see “Working with LDAP-acquired users and groups” on page 276.

- Importing the users and groups through a comma-separated values (CSV) file, used to quickly import large numbers of users and groups if your organization does not have LDAP; see “Importing user and groups CSV files” on page 276.

- Creating users and groups manually, used if the number of users and groups in your organization is not too large or you do not use CSV files or LDAP; see “Creating groups manually” on page 280 and “Creating a new user manually” on page 282.

After you add these users and groups, you must set their permissions for folders in the Breeze libraries, as well as perform routine maintenance activities, such moving users between groups to reflect promotions or transfers. The procedures for all of these apply, and are the same, regardless of how you initially added the users and groups.

**Working with LDAP-acquired users and groups**

In LDAP-enabled organizations, Breeze acquires all its user data directly from the company's user directory; this includes required information such as login, name, phone number, as well as other optional information, such as the user's department. However, you must still manually assign these users or groups, as applicable, to the Built-in group appropriate for their job function. For information on doing this, see “Assigning a user to a group” on page 290 and “Adding members to a group” on page 294, as appropriate.

You also need to manually set permissions for individual users and custom groups, to expand or restrict access to various folders as necessary. For this information, see “Setting custom permissions for the Breeze libraries” on page 285.

**Importing user and groups CSV files**

If your organization's directory has a utility for exporting users and groups to CSV files, or you have a list of users available, you can create a CSV file that you can import into Breeze using the Import feature of the Administration function. Breeze allows you to import CSV files to accomplish the following tasks:

- Create new users; see “Importing a user CSV file (create new users)” on page 277.
- Create new groups; see “Importing a group CSV file (create new groups)” on page 278.
- Create new users and add them to a designated group; see “Importing users and adding them to groups (create new users and add them to a group)” on page 279.
In order to perform any of these imports, you must follow the CSV format that Breeze provides. Each procedure includes examples of acceptable formats. These examples show the values that are required for Breeze, though you can also specify additional attributes on the file that are standard for your organization.

After you import the users and groups, you must set permissions for them. For instructions, see “Setting custom permissions for the Breeze libraries” on page 285. You can modify the imported users and groups in exactly the same way you would any users and groups that were manually created.

**Importing a user CSV file (create new users)**

You can use this option if you have users in your company that you don’t want to add to a group, or if you want to manually create a custom group later for these users (see “Creating a custom group” on page 281).

Before you can perform this procedure, you must create a user CSV file for the individual users whom you want to add to your Breeze system. Due to browser limitations, and also because the import process can take quite a while, Macromedia recommends that you create separate CSV files of 10,000 or fewer users per import.

The following example shows the user information required for a CSV file that is adaptable for Breeze:

**To import a user CSV file:**

1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.
3. Click the Import link above the list.
   The Import page appears.
4. Do the following:
   a. Under the Select Import Type bar, select the Create New Users option.
   b. Under the Select File to Import bar, browse to the CSV file you want to import.
   c. Click the Upload button.
   The upload runs. After the upload is done, a page appears that allows you to download a revised CSV file with the results of the import operation. This file is a revised version of your original CSV file, and it indicates which users were successfully created and which users, if any, were not, due to an error in your CSV file.

   **Note:** If the CSV file contains the names of users who are already in the system, the system ignores them, but logs a message stating that duplicate users were encountered.

5. Download the revised CSV file to check for errors.
6. Do either of the following, as appropriate:
   - If there were no errors, proceed to step 7
   - If there were errors, make your edits and re-import the file, and then proceed to step 7
7. Set permissions for these users; see “Setting custom permissions for the Breeze libraries” on page 285.

**Importing a group CSV file (create new groups)**

Use the group import option to import groups into the Breeze database. After you import the group CSV file, you can assign new users to the groups (see “Importing users and adding them to groups (create new users and add them to a group)” on page 279). You do not have to import any of the Built-in groups, because these are pre-installed and automatically appear in the list.

When you create the CSV export file, ensure that it’s in a format that Breeze can use. The following is an example of a group CSV file that is adaptable for Breeze:

After you add these groups, you can assign the users to these groups (see “Assigning a user to a group” on page 290). After this, you still must set permissions for these groups for the Breeze libraries.

**To import a group CSV file:**

1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.
3. Click the Import link above the list.
   The Import page appears.
4. Do the following:
   a. Under the Select Import Type bar, select the Create New Groups option.
   b. Under the Select File to Import bar, browse to the CSV file that you want to import.
   c. Click the Upload button.
      The upload runs. After the upload is done, a page appears that allows you to download a revised CSV file with the results of the import operation. This file is a revised version of your original CSV file, and it indicates which groups were successfully created and which groups, if any, were not, due to an error in your CSV file.
      
      **Note:** If the CSV file contains the names of groups that are already in the system, the system ignores them, but logs a message stating that duplicate groups were encountered.
5. Download the revised CSV file to check for errors.
6. Do either of the following:
   a. If there were no errors, proceed to step 7
   b. If there were errors, make your edits and re-import the file, and then proceed to step 7
7. Do either of the following:
   a. Proceed to “Importing users and adding them to groups (create new users and add them to a group)” on page 279.
   b. Set permissions for these groups, see “Setting custom permissions for the Breeze libraries” on page 285.
Importing users and adding them to groups (create new users and add them to a group)

Use this option to import new users and add them to a Built-in or previously created group. The Built-in group names appear in the pop-up menu for group selection as default groups. After you create a group manually, its name also appears in the menu, so you can use the import option to assign large numbers of users to multiple groups. However, you can only select one group for the users whom you imported from one CSV file. This means that you should create a different CSV file for each set of users that you want to add to a specific group. Due to browser limitations, and also because the import process can take quite a while, Macromedia recommends that you create separate CSV files of 10,000 or fewer users per import.

After you imported these users, you can:

- Assign these users to additional groups, see “Assigning a user to a group” on page 290.
- Assign the whole group to another group, see “Adding members to a group” on page 294.

Since you can add groups, as well as users, to an existing group, you can use this procedure to assign the group to which you've just added these users to another group. For example, if you have just imported new users in a single department in your company and assigned them to the Sales and Promotion group, and you also want to give them Publish permissions for the Content library, you can assign the entire Sales and Promotion group to the Authors group.

- Expand or restrict permissions for the group or any of the people with it, you can set the appropriate permissions in the specific libraries. For example, if there are members within the Sales and Promotion department that you do not want to have Publish permissions for a specific set of folders the Content library, you can assign these individuals Denied permissions for these folders.

After you add the new users to a group, you must assign permissions for these imported users for the Breeze libraries.

The following example shows the minimum user information requisite for a Breeze-adaptable CSV; you can add other information in the CSV file to prepopulate other user properties:

To import a user CSV file and add the users to a group:
1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.
3. Click the Import link above the list.
   The Import page appears.
4. Do the following:
   a. Under the Select Import Type bar, select the Create New Users and Add Them to a Group option.
   b. Under the Select File to Import bar, browse to the CSV file that you want to import.
   c. Click the Upload button.
The upload runs. After the upload is done, a page appears that lets you download a revised CSV file with the results of the import operation. This file is a revised version of your original CSV file, and it indicates which users were successfully created and which users, if any, were not, due to an error in your CSV file.

**Note:** If the CSV file contains the names of groups that are already in the system, the system ignores them but logs a message stating that duplicate groups were encountered.

5. Download the revised CSV file to check for errors.

6. Do either of the following, as appropriate:
   - If there were no errors, proceed to step 7
   - If there were errors, make your edits and re-import the file, and then proceed to step 7

7. Select the group to which you want to add these users.

8. Set permissions for these users, see “Setting custom permissions for the Breeze libraries” on page 285.

**Creating groups manually**

Because part of setting up new Breeze users in the system involves assigning them to their appropriate groups, it is best to create these groups first. Although Breeze provides the six Built-in default groups, you must create groups that are specific to your organization. Such groups might mirror your company's organizational structure or regional locations. Because these groups must be manually created, Breeze refers to them as custom groups.

When the custom groups are created, you can simply add users to them as you set up each new user account, or use the CSV import option to import large numbers of users into a group you created (see “Importing users and adding them to groups (create new users and add them to a group)” on page 279).

To create a custom group, see “Creating a custom group” on page 281.

After you create the custom groups, you can set permissions for them in the Breeze libraries. Those permissions apply specifically to the folders and files within that library. For more information, see “Setting custom permissions for the Breeze libraries” on page 285.
When creating groups manually, use the Users and Groups list, which is the page that appears when you click the Users and Groups link on the Administration tab.

Creating a custom group

Remember that a group can contain both users and other groups. This means that you can add Built-in groups and other custom groups, as well as users, to the custom group. Use the following procedure to create a custom group.

To create a new custom group:
1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.
   
   **Note:** You can check that this group does not already exist by entering its name in the Search text input box at the bottom of the list. If such a group does exist, it will display; otherwise a blank list appears; click Clear to return to the list page or type another name to search.
3. Click the New Group button at the bottom of the list.
   The New Group Information wizard appears.
4. Enter the new group’s name and description.
5. Do either of the following, as appropriate:
   ■ To add this group without adding members, click Finish.
     The Group Information page appears; if you decide to add members at this point, click the View Group Members button and proceed to step 6
   ■ To add members, click Next.
     The Edit Group Membership page appears with the Possible Groups list on the left and the Current Group Membership list on the right.

6. In the Possible Groups list, select each user and group that you want to assign to this group, as follows:
   ■ To select multiple users or groups, press Control-click or Shift-click, as appropriate.
   ■ To expand a group so you can select individual names, double-click the group name; when you are done, double-click Up One Level in the list to return to the original list.
   ■ To search for a name in the list, click Search at the bottom of the list and enter the name to display it in the list, and then select it in the window.

7. Click Add.
   The message “Submitting Request” appears, and then the message “Operation Successful.” After this, the users and groups that you added appear in the Current Group Membership window; to remove a name from this window, select it and click Remove.

8. Repeat step 3 through step 7 for each group to be added.

9. Click Finish.
   The View Group Membership page appears.

10. Click the View Group Membership button to review the group members and make any adjustments.
    The Edit Group Membership page reappears with the Possible Groups list on the left and the Current Group Membership list on the right.

Creating a new user manually

Once you have set up all the necessary custom groups, you can now proceed with creating Breeze accounts for new Breeze users and adding them to these groups. When you add a new user, you must enter a new password for them so that they can log in to Breeze, then change this password to a private one; this password is sent to them by e-mail. You also have the option of adding audio conference settings for this user, though this is not required information.

To create a new user:

1. Click the Administration tab at the top of the Breeze Manager window.

2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.

   Note: You can check that this name does not already exist by entering the name in the Search field at the bottom of the list. If such a group does exist, it appears; otherwise a blank list appears; click Clear to return to the list page or type another name to search.
3. Click the New User button at the bottom of the list.
   The New User Information wizard appears.

4. (Required) Enter the new user’s last name, first name, and e-mail address; (optional) enter any
   other profile information.

5. Type a new password to mail to this user in the New Password text box, and then retype it for
   confirmation; if the user has an e-mail address, leave the E-mail the New User Account
   Information, Login and Password box selected. If they do not have e-mail, deselect it.

6. (Optional) Enter any audio conference settings in the appropriate text boxes.

7. Do either of the following, as appropriate:
   ■ To end the wizard without assigning this user to any groups, click Finish.
     The User Information page for this user appears; if you decide to assign the user to a group
     at this point, click the View Group Members button and proceed to step 6
   ■ To assign this user to one or more groups, click Next.
     The Edit Group Membership page appears with the Possible Groups list on the left and the
     Current Group Membership list on the right.

8. In the Possible Groups list, select the each group to which you want to assign to this user as
   follows:
   ■ To add this group without adding members, click Finish.
     The User Information page appears; proceed to step 9
   ■ To add members, click Next.
     The Edit Group Membership page appears with the Possible Groups list on the left and the
     Current Group Membership list on the right. Proceed to step 10

9. Do either of the following:
   ■ To send a link to the user so that they can reset their password, click the “Send a link to reset
     this user’s password” link in the Password field.
     A message appears informing you that the e-mail was sent. Click OK to return to the User
     Information page.
   ■ To set a temporary password for this user that you can provide directly (for example, by
     telephone), click the Set a Temporary Password for this user.
     The temporary password page appears with a system-generated password for this user. Click
     Save to return to the User Information page.

10. In the Possible Groups list, select each group to which you want to assign this user, as follows:
    ■ To select multiple groups, press Control-click or Shift-click, as appropriate.
    ■ To expand a group so you can select individual names, double-click the group name; when
        you are done, double-click Up One Level in the list to return to the original list.
    ■ To search for a name in the list, click Search at the bottom of the window and enter the
        name to display it in the list, and then select it.
11. Click Add.

The message “Submitting Request” appears, and then the message “Operation Successful” appears. After this, the groups you added appear in the Current Group Membership window; to remove a group from this window, select it and click Remove.

12. Click Finish.

The User Information page reappears for this user.

Next, you can perform one of the following procedures:

• “Selecting a manager for a user” on page 284
• “Adding team members for a user” on page 285

**Selecting a manager for a user**

Use this procedure to designate a user’s manager. You can only select one manager for a given user; when you select another manager’s name, it replaces the first one that you added.

**To select a user’s manager:**

1. Click the Administration tab at the top of the Breeze Manager window.

2. Click Users and Groups.

   The list of all users and groups with Breeze accounts appears.

3. If necessary, click Search and enter the user’s name in the Search text box to locate the name in the list.

4. Select the user’s name and click Info at the bottom of the list.

   The User Information page appears for this user.

5. Click the Select Manager link to select a manager for this user.

   The Select Manager page appears, with the Possible Managers list on the left and the Current Team Manager list on the right.

6. In the Possible Managers list, select the manager to whom you want to assign this user; to search for a name in the list, click Search button at the bottom of the window and enter the name to display it in the list, and then select it.

7. Click the Set Manager button.

   The message “Submitting Request” appears, and then the message “Operation Successful” appears. After this, the name you selected appears in the Current Team Manager list; to remove this manager from list, select it and click Remove; to replace the manager, repeat step 6 and step 7.
Adding team members for a user

If a user is a manager, you can use this procedure to assign team members to the manager. When you do so, the manager can view report data for this user using the Manager Reports option on the Home tab.

To add team members for this user:

1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.
3. If necessary, click Search and enter the user’s name in the Search text box to locate the name in the list.
4. Select the user’s name and click Info at the bottom of the list.
   The User Information page appears for this user.
5. Click Edit Team Members link to select team members for this user.
   The Edit Team Members page appears, with the Possible Users list on the left and the Current Team Members list on the right.
6. In the Possible Users list, select each name to which you want to assign this user as follows:
   - To select multiple users, press Control-click or Shift-click, as appropriate.
   - To search for a name in the list, click Search at the bottom of the window and enter the name to display it in the list, and then select it.
7. Click Add.
   The message “Submitting Request” appears, and then the message “Operation Successful” appears. After this, the name you selected appears in the Current Team Members list; to remove this manager from list, select it and click Remove; to add more team members, repeat step 6 and step 7.

Setting custom permissions for the Breeze libraries

After creating or importing users in a custom group, the administrator assigns the group’s permissions. If you create the users manually or use the CSV import function, you can do this by assigning the users to one or more of the Built-in groups to reflect this group’s access needs. For information on these groups’ permissions, see “Built-in groups” on page 259. When you create the group, you can also assign custom groups of users to Built-in groups; see “Creating groups manually” on page 280.

Regardless of how you add these users to Built-in groups, you might also want to add or restrict permissions for this group for a specific library. You do this by going to the respective tab where you want to add the group (Content, Meetings, Training, Event Management, and Seminar Rooms) and adding the group to the appropriate folders on that tab.

Whereas individuals with Manage permissions in the Breeze libraries can assign permissions for their own folders or files, the administrator is responsible for assigning permissions to the Shared folder itself in each of these libraries to Breeze groups.
For information on setting custom permissions for a library, see the appropriate procedure below:

- Content library; see “Setting custom permissions for content files and folders” on page 51
- Meetings library; see “Setting meeting folder permissions” on page 154
- Event library; see “Setting event folder permissions” on page 231
- Training library; see “Setting training folder permissions” on page 114
- Seminar library; see “Setting seminar folder permissions” on page 191

Changing and viewing information for existing users

It is the administrator's responsibility to maintain all aspects of Breeze user accounts. This involves changing the user’s details, manager, team members, and group memberships as needed. For information see the following procedures:

- “Viewing user information” on page 286
- “Changing a user's details” on page 288
- “Changing a user's manager” on page 288
- “Changing a user's team members” on page 289
- “Assigning a user to a group” on page 290
- “Removing a user from a group” on page 290
- “Deleting a user” on page 291

Any change that necessitates modifying any of these details usually involves changing the user's access permissions in the Breeze libraries, as well. For information, see the procedure in the appropriate chapter:

- For Content library permissions, see “Modifying file or folder permissions” on page 53
- For Meetings library permissions, see “Modifying the permission access list” on page 155
- For Event library permissions, see “Modifying the permissions access list” on page 232
- For Training library permissions, see “Modifying the permission access list” on page 116
- For Seminar library permissions, see “Modifying the permission access list” on page 193

Viewing user information

If you are an administrator, you can view the following information about any user:

- E-mail address
- First name
- Last name
- Login
- Audio conferencing settings
- Any other information in custom fields that you created for user profiles

To edit user information, see “Editing user information” on page 287, “Assigning a user to a group” on page 290, or “Removing a user from a group” on page 290.
To view a user’s information:

1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   
   The list of all users and groups with Breeze accounts appears.
3. If necessary, click Search and enter the user’s name in the Search text box to locate the name in the list.
4. Select the user’s name and click Info at the bottom of the list.
   
   The User Information page appears for this user.
5. To view additional information for this user, click the appropriate link above the User Information title bar:
   ■ Edit Group Membership
   ■ Select Manager
   ■ Edit Team Members

Editing user information

The administrator creates all the components of Breeze user’s account when adding the user into the Breeze system, and only the administrator can modify these components. The procedures in this section explain how to change any of the following elements of a user’s account once a user exists in the system:
• E-mail address
• First name and last name
• Breeze login
• Audio conferencing information
• Any other information you added for custom fields that you created for user profiles
• Group membership
• Manager
• Team members

However, you cannot change this user’s password. Although you assign a temporary password to a new user when you create this user’s account, you cannot subsequently change this password. This is true even if a user forgets the password; the user must click the “Forgot your password? Click here” link when logging in to Breeze Manager.

No one can change another user’s password; you can only change your own password. For information on changing passwords, see Chapter 1, “Understanding the Workspace,” on page 15. For details on changing other user attributes, use the following procedures.
Changing a user’s details

Follow this procedure to change the user’s first or last name, e-mail, audio conference settings, or information in any custom field that you added for your company’s user profiles.

To change a user's manager, see “Changing a user's manager” on page 288; to change a user's team members, see “Changing a user's team members” on page 289; to change a user's group membership, see “Assigning a user to a group” on page 290 or “Removing members from a group” on page 294.

To change a user’s details:

1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.
3. If necessary, click Search and enter the user’s name in the Search text box to locate the name in the list.
4. Select the user’s name and click Info at the bottom of the list.
   The User Information page appears for the user.
5. Click the Edit Information link above the User Information title bar.
   The Edit Information page appears.
6. Edit any of the fields that you want to change.
7. Click the Save button.
   The User Information page reappears for this user, reflecting the new information.

Changing a user’s manager

Follow this procedure when a user's manager has changed, either because the user moved to a different department or because the user's manager has been replaced. If the user has transferred to another department, then you might need to change the user’s group membership or their permissions for various Breeze libraries, as well.

To change a user’s manager

1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.
3. If necessary, click Search and enter the user’s name in the Search text box to locate the name in the list.
4. Select the user’s name and click Info at the bottom of the list.
   The User Information page appears for this user.
5. Click the Select Manager link above the User Information title bar.
   The Select Manager page appears, with the Possible Managers list on the left and the Current Team Manager list on the right.
6. In the Possible Managers list, select the manager to whom you want to assign this user; to search for a name in the list, click Search at the bottom of the window and enter the name to display it in the list, and then select it.

7. Click the Set Manager button.

The message “Submitting Request” appears, and then the message “Operation Successful” appears. After this, the name that you selected appears in the Current Team Manager list; to remove this manager from list, select the name and click Remove; to replace the manager, repeat step 6 and step 7.

**Changing a user’s team members**

Follow this procedure to add or remove team members for an existing user. You would do this in a situation where a team member left a manager’s group, or entered it, or where a user became a manager and was assigned new direct reports.

**To change a user’s team members**

1. Click the Administration tab at the top of the Breeze Manager window.

2. Click Users and Groups.

The list of all users and groups with Breeze accounts appears.

3. If necessary, click Search and enter the user’s name in the Search text box to locate the name in the list.

4. Select the user’s name and click Info at the bottom of the list.

The User Information page appears for this user.

5. Click the Edit Team Members link above the User Information title bar.

The Edit Team Members page appears, with the Possible Users list on the left and the Current Team Members list on the right.

6. In the Possible Users list, select the manager to whom you want to assign this user; to search for a name in the list, click Search at the bottom of the window and enter the name to display it in the list, and then select it.

7. Click Add.

The message “Submitting Request” appears, then the message “Operation Successful.” After this, the name you selected appears in the Current Team Manager list; to remove this manager from list, select it and click Remove; to replace the manager, repeat step 6 and step 7.
Assigning a user to a group

Follow this procedure to add a user to a specific group in situations where a user has transferred to another department in the organization, was promoted, or made any change that necessitated adding this user to a new Built-in or custom group. You can also use this procedure to assign a user to a specific seminar licensed folder.

To assign a user to a group

1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.
3. If necessary, click Search and enter the user’s name in the Search text box to locate the name in the list.
4. Select the user’s name and click Info at the bottom of the list.
   The User Information page appears for this user.
5. Click the Edit Group Membership link above the User Information title bar.
   The Edit Group Membership page appears, with the Possible Groups list on the left and the Current Group Membership list on the right.
6. In the Possible Groups list, select each group to which you want to assign this user as follows:
   - To select multiple groups, press Control-click or Shift-click, as appropriate.
   - To expand a group so you can select individual names, double-click the group name; when you are done, double-click Up One Level in the list to return to the original list.
   - To search for a name in the list, click Search at the bottom of the window and enter the name to display it in the list, and then select it.
7. Click Add.
   The message “Submitting Request” appears, and then the message “Operation Successful” appears. After this, the groups that you added appear in the Current Group Membership window; to remove a group from this window, select it and click Remove.

Removing a user from a group

Follow this procedure to remove a user from a specific group in situations where a user has transferred to another department in the organization, was promoted, or made any change that necessitated removing this user from a group.

To remove a user from a group:

1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.
3. If necessary, click Search and enter the user’s name in the Search text box to locate the name in the list.
4. Select the user’s name and click Info at the bottom of the list.
   The User Information page appears for this user.
5. Click the Edit Group Membership link above the User Information title bar.
   The Edit Group Membership page appears with the Possible Groups window on the left and
   the Current Group Membership window on the right.
6. In the Current Group Membership window, select the group from which you want to remove
   this user as follows:
   ■ To select multiple groups, press Control-click or Shift-click, as appropriate.
   ■ To search for a name in the list, click Search at the bottom of the window and enter the
     name to display it in the list, and then select it.
7. Click Remove.
   The list refreshes without the group(s) you removed.

Deleting a user

If you are an administrator, you can delete any Breeze user account. Once the account has been
deleted, this user is permanently deleted from the system and the following occurs:
• The user is removed from all group lists.
• The user is removed from the enrollee lists for all courses.
• Reports for the user are no longer available.

To delete a user:
1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.
3. If necessary, click Search and enter the user’s name in the Search text box to locate the name in
   the list.
4. Select the user’s name.
5. Click Delete at the bottom of the list.
   A confirmation page appears with this user’s name, confirming that you have selected the
   correct user to delete and instructing you to click Delete to permanently remove this user.
6. Do either of the following, as appropriate:
   ■ If this is the user you want to delete, click Delete below the message text.
   ■ If this is not the user you want to delete, click Cancel below the message text.
   In either case, the Users and Groups list reappears; if you removed this user, the name no
   longer appears in the list. If you clicked Cancel, it remains in the list.
Viewing and changing information for existing groups

The administrator sets up groups to conform with Breeze users’ permissions needs. Often, the membership of such groups changes, and you must change the group’s composition to reflect this. Whereas a group’s composition automatically changes when you add or remove an individual user at the user level, you use the group editing feature to move large numbers of users in and out of groups, as well as to change group details.

In addition, you can change the names of Built-in groups; however, this makes support more difficult, and Macromedia does not recommend this practice. You can also change the descriptions and the group membership of Built-in groups, but you cannot change permissions for these groups. For custom groups, however, you can change any attribute, or delete the group, if necessary.

This section contains the following procedures for viewing and changing attributes for a given group:

• “Viewing group information” on page 292
• “Changing a group name or description” on page 293
• “Viewing or changing a group’s permissions” on page 293
• “Adding members to a group” on page 294
• “Removing members from a group” on page 294
• “Deleting a group” on page 295

Viewing group information

If you are an administrator, you can view information about any group. This includes the group name, description, and a list of members.

To edit group information, see “Changing a group name or description” on page 293, “Adding members to a group” on page 294, or “Removing members from a group” on page 294.

To view a group’s information:

1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.
3. If necessary, click Search and enter the group’s name in the Search text box to locate the name in the list.
4. Select the group’s name and click Info at the bottom of the list.
   The Group Information page appears for this user.
5. To view the group’s membership, click the View Group Members button.
   The Edit Group Membership page appears with the Possible Groups window on the left and the Current Group Membership window on the right.
Changing a group name or description

If you are an administrator, you can edit the name or description for any group, even Built-in groups, although Macromedia does not recommend this practice. If necessary, you can also use this procedure to change the name of a particular seminar license group to associate it with a specific organizational or functional group in your organization.

To change a group name or description:
1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.
3. If necessary, click Search and enter the group’s name in the Search text box to locate the group’s name and click Info at the bottom of the list.
   The Group Information page appears for this group.
4. Click the Edit Information link above the Group Information title bar.
   The Edit Information page appears.
5. Edit the fields you want to change.
6. Click the Save button.
   The Group Information page reappears for this group, reflecting the new information.

Viewing or changing a group’s permissions

To view or change permissions for an existing group, you must be in the library for which these permissions exist. In addition, because permissions are assigned to a file or folder, if the files are contained in multiple folders in different libraries, you must change the permissions for all the folders in those libraries. For example, if you are changing a group’s permissions for a specific meeting folder in the Meetings library, and the meeting uses a presentation in a folder in the Content library, you must also change the group’s permissions for that Content library folder, as well.

If you adjust the permissions for a folder, permissions for all files or subfolders contained in that folder are set to that permission level. The exception is Content library files or folders; here, you can change the permissions for the individual files or folders below this folder to something other than the parent folder.

To view or change permissions for a file or folder, you must open it. To do so, click the tab for the library whose file or folder permissions you want and refer to the appropriate procedure below:

- For Content library permissions, see “Modifying file or folder permissions” on page 53
- For Meetings library permissions, see “Modifying the permission access list” on page 155
- For Event library permissions, see “Modifying the permissions access list” on page 232
- For Training library permissions, see “Modifying the permission access list” on page 116
- For Seminar library permissions, see “Modifying the permission access list” on page 193
Adding members to a group

If you are an administrator, you can add both users and groups to a group.

To add members to a group:
1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.
3. If necessary, click Search and enter the group’s name in the Search text box to locate the name in the list.
4. Select the group’s name and click Info at the bottom of the list.
   The Group Information page appears for this group.
5. Click the View Group Members button.
   The Edit Group Membership page appears with the Possible Group Members list on the left and the Current Group Members list on the right.
6. In the Possible Group Members list, select each group to which you want to assign this user as follows:
   - To select multiple groups, press Control-click or Shift-click, as appropriate.
   - To expand a group so that you can select individual names, double-click the group name; when you are done, double-click Up One Level in the list to return to the original list.
   - To search for a name in the list, click Search at the bottom of the window and enter the name to display it in the list, and then select it.
7. Click Add.
   The message “Submitting Request” appears, then the message “Operation Successful.” After this, the groups you added appear in the Current Group Membership window; to remove a group from this window, select it and click Remove.

Removing members from a group

If you are an administrator, you can remove any members, including groups, from a group.

To remove members from a group:
1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   The list of all users and groups with Breeze accounts appears.
3. If necessary, click Search and enter the group’s name in the Search text box to locate the name in the list.
4. Select the group’s name and click Info at the bottom of the list.
   The Group Information page appears for this group.
5. Click the View Group Members button.
   
The Edit Group Membership page appears with the Possible Group Members list on the left and the Current Group Members list on the right.

6. In the Current Group Membership window, select each user and group that you want to remove from this group, as follows:
   - To select multiple users or groups, press Control-click or Shift-click, as appropriate.
   - To search for a name in the list, click Search at the bottom of the window and enter the name to display it in the list, and then select it.

7. Click Remove.
   
The message “Submitting Request” appears, and then the message “Operation Successful” appears. After this, the name that you removed disappears from the Current Group Membership window.

Deleting a group

If you are an administrator, you can delete any group except the Built-in groups.

Before deleting a group, consider the impact on the permissions of the members and other groups. If the group was added to the permissions profile for any file or folder in any library, deleting the group affects the permissions of its members because they no longer have permissions for those files or folders (unless the members also belong to other groups with permissions for those files or folders).

To delete a group:
1. Click the Administration tab at the top of the Breeze Manager window.
2. Click Users and Groups.
   
The list of all users and groups with Breeze accounts appears.
3. If necessary, click Search and enter the group’s name in the Search text box to locate the name in the list.
4. Select the group’s name.
5. Click Delete at the bottom of the list.
   
A confirmation page appears with this group’s name, confirming that you selected the correct user to delete and instructing you to click Delete to permanently remove this user.
6. Do either of the following, as appropriate:
   - If this is the user you want to delete, click Delete below the message text.
   - If this is not the user you want to delete, click Cancel below the message text.

In either case, the Users and Groups list reappears; if you have removed this group, the name no longer appears in the list. If you pressed Cancel, the name remains in the list.
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