Unified Conference Calling Guide

Moderator

Starting a Conference

To start a conference

- Dial the access telephone number for the Conferencing service.
- You are prompted for the moderator code. Enter this on your telephone keypad, then press the # (pound/hash) key.
- You are then prompted to record your name. This will be used in announcements within the conference (to indicate that you have joined or left, or in a roll-call listing who is in the conference). Say your name clearly, then press the # key.
- To request a "roll call" of all participants currently in the conference, press *4. You hear an announcement giving the names that the moderator and participants recorded when joining the conference.
- To request a count of all participants currently in the conference, press *5. You hear an announcement informing you how many participants are in the conference.
- To request the name of the last participant who joined the conference, press *7. You hear an announcement giving the name that this participant recorded when joining the conference.

If a participant did not record a name, but just pressed the # key when prompted to record a name:

- No announcement is played when this participant joins or leaves the conference; only the tones are played (if enabled).
- The participant's name is not included in roll call announcements. This means that the number of names in the roll call may not match the number indicated by the participant count announcement

To lock the conference so that no further participants can join it, press *3.
You may want to do this when all of the expected participants have joined and you want to make sure that no unauthorized participants can join, or if you want to restrict the number of participants on a first come, first served basis. To unlock the conference so that further participants can join it, press *3 again.

To start a recording of the conference (if your service provider has enabled this feature), press *8. If your service provider has not permitted you to record conferences, this key has no effect. To stop recording, press *8 again. The recording is saved on the Conferencing server. You can download it later using the Moderator Web Interface, either to listen to it or to save it to your local computer. If you start and stop recording more than once in the same conference, the recordings are saved as separate files, and count separately towards your maximum permitted number of recordings.

To mute your phone so that no sound is played into the conference, press *2.
You may want to do this while you talk privately to someone in the room. To unmute your phone so that you can resume talking in the conference, press *2 again.

To mute all other participants' phones so that no sound from their phones is played into the conference, press *9. You may want to do this if you are the only speaker and do not need to allow other participants to speak in the conference, so that background noise picked up by their phones is not played into the conference.

A participant whose phone is muted can press a key to alert the moderator's attention if he or she wants to speak in the conference. The web interface displays this alert status, but the Telephone Admin Interface does not inform you of the alert. If you choose to mute all participants, you are recommended to use the web interface to monitor the conference, so that you can check for alerts from participants.

1. Moderator Web Interface

This section explains how to use the Moderator Web Interface to set up and manage conferences.

Some of the features of the Moderator Web Interface are also available in the Telephone Admin Interface, described in Chapter 3, or in the Conference Widget, CommPortal Conference for iPhone or CommPortal Conference for Android.

1.1 Accessing the web interface

To access the web interface, you will need the following information, which your service provider should give to you.

- The website address (URL) of the Moderator Web Interface.
- Your participant code and moderator code for conferences. You will need both of these codes to log in.

Start your web browser and enter the web address in the address bar. You may see one or more security dialogs; choose **OK** or **Yes** to accept these.

You should then see the web interface logon window, which asks you for the participant and moderator codes.

Figure 2. Moderator Web Interface logon window

Type the two codes in the appropriate edit boxes, then click the **Log On** button.

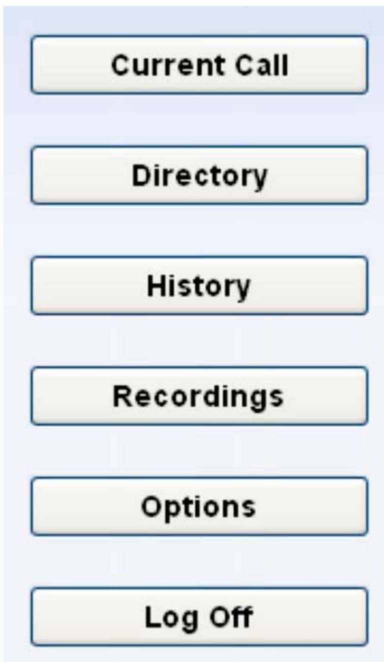
The moderator code is treated as a password, so that the characters you type are replaced on the screen by dots. This is because it gives you privileged access to moderator-only functions and should not be disclosed to any other conference participants.

If you see a message saying "Account Disabled" after entering your participant code and moderator code, this indicates one of the following.

- You have access to Conferencing only at specific times (for example to hold a weekly conference at a specific time) and this is not a valid time for you to start a conference.
- Your access to Conferencing has been suspended. You will not be able to start any conferences. Please talk to your service provider to resolve this.

When you have logged on successfully, a list of options for managing conferences appears on the left-hand side of the screen.

Figure 3. Moderator Web Interface options



When you first come into the interface, the **Current Call** option is selected. This option allows you to manage a conference, as described in the following section.

The Recordings button does not appear if your service provider has chosen not to offer you this feature.

When you first come into the interface, you may see a message informing you that there are one or more conference recordings that will soon be automatically deleted. You can check these as described in section 4.5, and download them to your local computer if you need to store them for future reference.

If your service level permits HD audio, the HD audio symbol appears above the list of options on the left-hand side of the screen.

For security reasons, you should always log off the web interface when you have finished using it. This ensures that another user cannot gain access to your conferencing facilities from your computer.

If you leave the web interface running for 30 minutes without using any of the controls or clicking on any button, the Conferencing server logs you off automatically. This is an additional security feature, to avoid unauthorized access if you leave your computer without logging off.

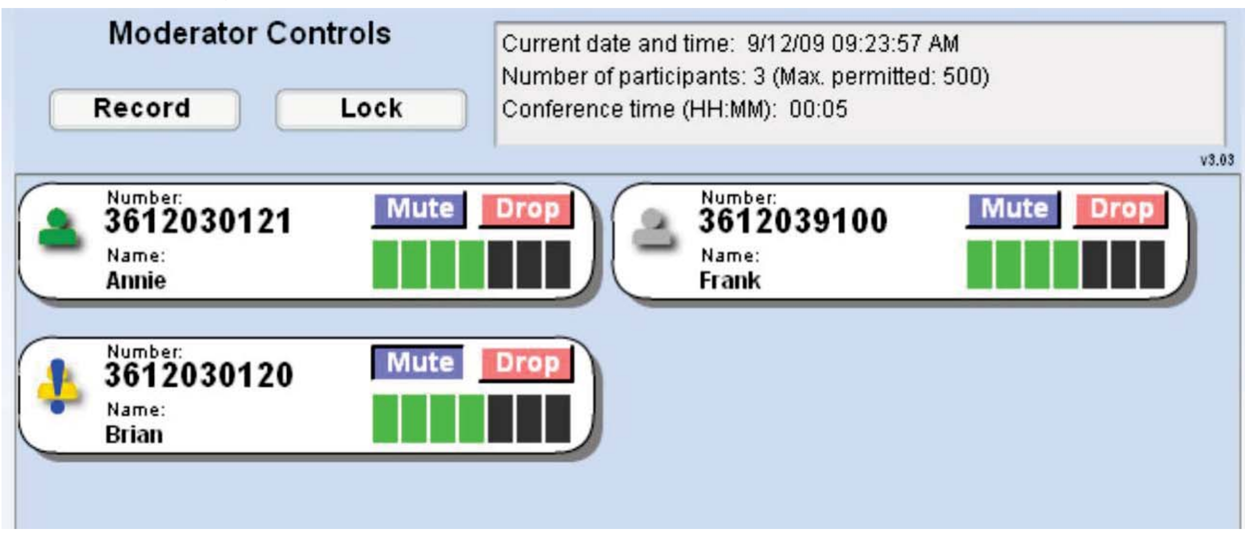
1.2 Current Call

The Current Call window allows you to manage a conference. If this window is not already shown on the screen, click on the **Current Call** button to display it.

If you have not yet started a conference, the screen shows the message "There is no conference at this time". If you need to start a conference, use the Telephone Admin Interface to do this, as described in section 3.1.

When more participants join the conference, the window appears as shown in Figure 4.

Figure 4. An active conference in the Current Call window



The panel at the top right provides information about the current conference. To the left of this are two buttons to control recording and locking the conference, which are described later in this section.

Each participant in the conference is represented by a panel with a telephone number at the top, as shown in Figure 4.

The conference moderator is always represented by the panel in the top left corner. All other panels represent the other conference participants.

If there is a blank space in the top left corner but there are other panels visible, this means that one or more conference participants have already dialed in before the moderator. Normally, the conference won't start until the moderator joins. If you have configured on-hold music, the participants will hear music while they wait for the conference to start; they will not be able to talk to each other. However, if you have specified that conferences can start without the moderator, and if there are two or more participants already present, then the conference will already be in progress.

The panel for each participant (including the moderator) shows the following details.

- The participant's calling telephone number.
- The participant's name, if the Conferencing server can determine it.
    - This is taken from a directory entry matching the calling number, if there is one, or from the caller name that the server received when this participant dialed in. You can change the displayed name as described in section 4.2.1, Changing and storing participants' names.
- A **Mute** button, allowing you to mute this participant's phone so that no sound from it is played into the conference. For more details, see section 4.2.2, Muting participants.
- A **Drop** button, allowing you to remove this participant from the conference. For more details, see section 4.2.6, Removing participants from the conference.
- A gain control, allowing you to balance this participant's sound level so that all participants can be heard clearly. For more details, see section 4.2.3, Controlling volume levels.

On the left of each panel is a "person" icon representing the participant, which appears in different colors to represent the participant's status in the call:

- Gray: the participant is in the call but is not currently speaking.
- Green: the participant is speaking, or other sounds are being played into the conference from the participant's phone.
- Yellow: the moderator has muted this participant's phone.

If a participant's phone is muted, he or she can indicate a request to speak using the telephone interface, as described in Chapter 5. This request is indicated by an exclamation point over the "person" icon for this participant.

1.2.1 Changing and storing participants' names

The panel corresponding to each participant shows the participant's name, if the Conferencing server can determine it. This is taken from a directory entry matching the calling number, if there is one, as described in section 4.3, Directory. Otherwise it is taken from the caller name that the server received when this participant dialed in.

If there is no name displayed or it is not correct, you can change it. Click on the name, or in the blank space below the word "Name" if no name is displayed, and type in the correct details. This name can include accented / international characters.

The participant name that you provide is solely for your own use as the conference moderator. Conference participants do not have access to the web interface, and will not be able to see the names displayed.

When you move away from the participant panel and click on another part of the Current Call window, the new name that you have entered is saved in a directory entry, as described in section 4.3, Directory. This means that the updated information is available for future conferences: anyone who dials in to a later conference using this calling number will be identified by this name, in both the Current Call window and the Conference History lists.

You will not be able to add new directory entries if you have reached the maximum number of entries permitted by your Class of Service. You can still change user names in the Current Call window, but your changes will not be saved in the directory and will not be available for future conference calls.

In this case, you can delete some directory entries that you no longer need, as described in section 4.3, Directory, in order to make room for new ones. Alternatively, you may need to contact your service provider about upgrading to a different Class of Service that allows you more entries.

1.2.2 Muting participants

Depending on the purpose of the conference, you may want to set up the conference so that all participants can talk in the conference at any time (for example in a discussion meeting), or you may be the only speaker in all or part of the conference (for example in a lecture or presentation). If you are the only speaker and do not need to allow other participants to speak in the conference, you may want to mute a participant's phone to prevent background noise picked up by this phone from being played into the conference.

The Telephone Admin Interface allows you to mute or unmute all participants' phones by pressing a single button, as described in section 3.8. The web interface allows you to mute individual phones.

- To mute a participant's phone, click on the **Mute** button in the panel corresponding to that participant. The "person" icon on the left of this panel changes to yellow, and the participant hears an announcement that the phone has been muted.
- To remove the mute so that the participant can speak into the conference (for example when you have finished presenting and are taking questions from the audience), click on the Mute button again. The "person" icon on the left of this panel changes back to gray, and the participant hears an announcement that the phone has been unmuted.

If a participant whose phone is muted wants to speak, he or she can indicate a request to speak using the telephone interface, as described in Chapter 5. You then see an exclamation point over the "person" icon for this participant.

- To allow the participant to speak, click on the **Mute** button.
- To clear the alert, click on the "person" icon for this participant.

1.2.3 Controlling volume levels

You can control the volume level for each conference participant individually, so that the different speakers are balanced in the conference. You may need to do this if one or more participants are calling in over poor-quality lines and other participants are having difficulty hearing them.

In the panel for each participant, the gain control appears as a set of seven vertical bars, with a number of these colored green to indicate the gain being applied to the incoming sound level. For example, one green bar (with the remaining six colored black) means that this participant's sound is turned down low, and five green bars (with the remaining two colored black) means that the sound is turned up just above a medium setting.

To change the volume level for a participant, click on the bar representing the level that you want.

1.2.4 Recording the conference

To start a recording of the conference (if your service provider has enabled this feature), click on the **Record** button in the moderator controls. If your service provider has not permitted you to record conferences, this button has no effect.

If your service level permits HD audio, and at least two participants (which may include you as the moderator) use HD audio, you will automatically make conference recordings in high-definition (16KHz).

Note that recordings of HD audio conferences are compressed for storage so although they offer improved quality they do not match the quality of an active HD audio conference.

Depending on how your service provider has configured Conferencing and your selections in the **Options** window, an announcement may be played into the conference each time you start or stop recording, to inform the participants that the conference is being recorded. See the description of the **Options** window in section 4.6.

National or local regulations may mean that there is a legal requirement to notify conference participants when a conference is being recorded, or other restrictions on how recordings can be used. It is your responsibility to ensure that you are not in breach of such regulations, especially if recording notifications are not in use.

You will not be able to start recording if you have reached the maximum number of recordings permitted by your Class of Service, or if you have less than one minute remaining of the maximum recording time permitted by your Class of Service. Also, if you are recording a conference and you reach the maximum recording time permitted by your Class of Service, the current recording will stop.

In these cases, you will need to delete one or more older recordings, in order to make room for new ones. See section 4.5, **Recordings**, for more details.

If you are the only participant in the conference and so on-hold music is playing, the music stops when you click on the **Record** button to start recording. This allows you to record introductory information about the conference (for example the date of the meeting, its purpose, and the expected participants) before the other participants have joined.

To stop recording, click on the **Record** button again. The recording is saved on the server. You can download it later, either to listen to it or to save it to your local computer; see section 4.5, **Recordings**, for more details.

If you start and stop recording more than once in the same conference, the recordings are saved as separate files, and count separately towards your maximum permitted number of recordings.

1.2.5 Locking the conference

To lock the conference so that no further participants can join it, click on the **Lock** button in the moderator controls at the top of the window. You may want to do this if you want to restrict the number of participants on a first come, first served basis.

If you lock the conference and then perform a soft exit, you will still be able to join it by dialing in as the moderator. However, nobody will be able to join it as a participant.

To unlock the conference so that further participants can join it, click on the **Lock** button again.

1.2.6 Removing participants from the conference

You may need to remove a participant from the conference, for example if he or she has obtained the participant code without your permission and is not authorized to be in the conference. To do this, click on the **Drop** button in the panel corresponding to that participant.

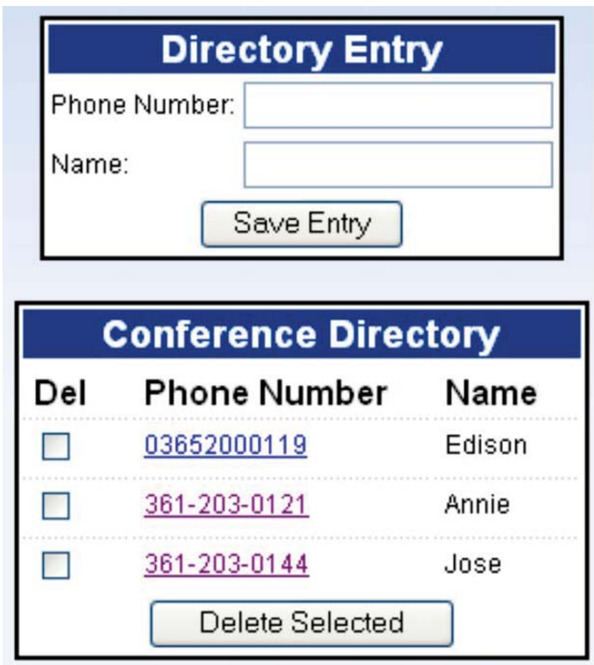
You are prompted with a **Yes** / **No** pop-up to confirm or cancel removing the participant. If you choose **Yes**, the participant hears an announcement that the moderator has removed him or her from the conference, and the participant's telephone call into the conference ends. The panel representing this participant disappears from the Current Call window.

1.3 Directory

The Directory window allows you to manage the names that were stored for conference participants in the Current Call window for a past conference. These names are stored for future use, so that anyone who dials in to a later conference using the same calling number will be identified by this name, in both the Current Call window and the Conference History lists. In particular, two different participants dialing in on the same telephone number (for example two people calling from the same company) cannot be distinguished, so you may want to change the directory entry to identify the company rather than a specific caller.

Click on the **Directory** button to display this window.

Figure 5. Directory window



When you edit the name of a conference participant in the Current Call window, as described in section 4.2.1, the name that you specify is associated with the participant's telephone number and stored in a directory entry.

The Directory window allows you to manage these entries while you are not in the conference. For example, you may want to fill in full names if you did not have time to do so during the conference, or to add names of expected participants in advance of the next conference. The list of existing directory entries is shown at the bottom of the window.

- To update the name or phone number of an existing directory entry, click on the phone number in this list. The **Phone Number** and **Name** edit boxes at the top of the screen change to show the current contents of this entry. Edit the contents as required, and then click on **Save Entry**.
- To add a new directory entry, click on New Entry to clear the edit boxes at the top of the screen if any data is shown in them. (You do not need to do this if you have just moved to the Directory window and the boxes are empty.) Type the phone number and name, and then click on **Save Entry**.
- To delete one or more existing directory entries, click on the **Del** checkbox next to each entry that you want to delete, and then click Delete Selected.

The **Name** field can include accented / international characters.

The information in these directory entries is solely for your own use as the conference moderator. Conference participants do not have access to the web interface, and will not be able to see the names displayed.

You will not be able to add new directory entries if you have reached the maximum number of entries permitted by your Class of Service. You can still change user names in the Current Call window, but your changes will not be saved in the directory and will not be available for future conference calls.

In this case, you can delete some directory entries that you no longer need, in order to make room for new ones. Alternatively, you may need to contact your service provider about upgrading to a different Class of Service that allows you more entries.

If you edit a participant's name in the Directory window while a conference is in progress, your changes do not appear in the Current Call window for the conference, but they will be used for future conferences. To ensure that your changes take effect immediately, edit the participant's name in the Current Call window instead of the Directory window.

1.4 History

The History window allows you to view a list of past conferences that you have managed. Click on the **History** button to display this window.

Figure 6. History window

Recent Conferences

Started	Name	Conference Duration	Max Participants	Rejected Participants
Mon October 05 2009, 03:19:20 PM		00:01:37 (HD)	1	N/A
Mon October 05 2009, 01:53:57 PM		00:43:43	500	1
Mon October 05 2009, 01:47:14 PM		00:00:00	2	N/A
Fri October 02 2009, 11:05:44 AM		00:10:00 (HD)	2	N/A
Thu October 01 2009, 10:35:21 AM		00:01:59	2	N/A

Save

For each conference, the following information is displayed.

- An optional name for this conference. This name can include accented / international characters.
  The conference appears in this list (with a blank name) as soon as it starts, so you can provide a name while the conference is in progress, or return to this window to provide a name later when the conference has finished.
- The time at which the conference started.
- The total duration of the conference. This starts when the moderator has successfully dialed in and provided the moderator code and a recorded name to start the conference. Alternatively, if you allow conferences to start before the moderator has joined as described in section 2.2.1, it starts as soon as two participants have successfully dialed in.

If the conference is still in progress, no duration is shown, but you can check the conference time shown in the Current Call window (as described in section 4.2).

If your service level permits HD audio, this also shows whether the conference used HD audio. A conference is classed as having used HD audio if at any point at least two participants (which may include you as the moderator) with phones supporting HD audio took part in the conference simultaneously.

- The maximum number of participants, which may include yourself as the moderator, who were in the conference at any time. This may not match the total number of participants who took part, if they were not all in the conference at the same time. (Note that this does not include participants who were invited in using outdial.)

- The number of participants, if any, who were rejected because the conference had already reached the limit on the number of participants in a conference.

You may want to use this information to check the bills that you receive for your use of the Conferencing service, or to check for any unexpected entries that may indicate unauthorized use of your moderator and participant codes. If you suspect that an unauthorized user has obtained these codes, you can change the participant and/or moderator code as described in section 4.6, **Options**.

The conference duration shown may be slightly shorter than the duration shown in billing records for the call.

- The billing record for the moderator's call starts when the moderator first calls the conferencing telephone number, but the conference may not start until a few seconds later when the moderator has provided the required details.
- The billing record for a participant's call will be longer than the conference duration if the participant joined before the moderator had dialed in.

To see more information about who took part in the conference, or about rejected participants, click on the number in the **Max Participants** or **Rejected Participants** column. (This is a new feature, so the information may not be available for some older conferences.) The screen shows the following information for each participant:

- The telephone number from which the participant dialed in, or the dialed number if you dialed out to invite the participant into the conference.

- The name of the participant stored in the Directory (as described in section 4.3, Directory), if there is one. This name appears only if the participant's calling telephone number, or the number you used when dialing out to invite the participant into the conference, exactly matches the number stored in the Directory.
- Whether or not the participant used HD audio.

- For rejected participants only: The date and time at which this person attempted to join the conference.

If one or more participants withheld their telephone number when dialing in, there will be a single entry "ID withheld" in the list of participants. If two or more participants dialed in using the same telephone number (for example if they dialed in from the same company), there will be only one entry for this number.

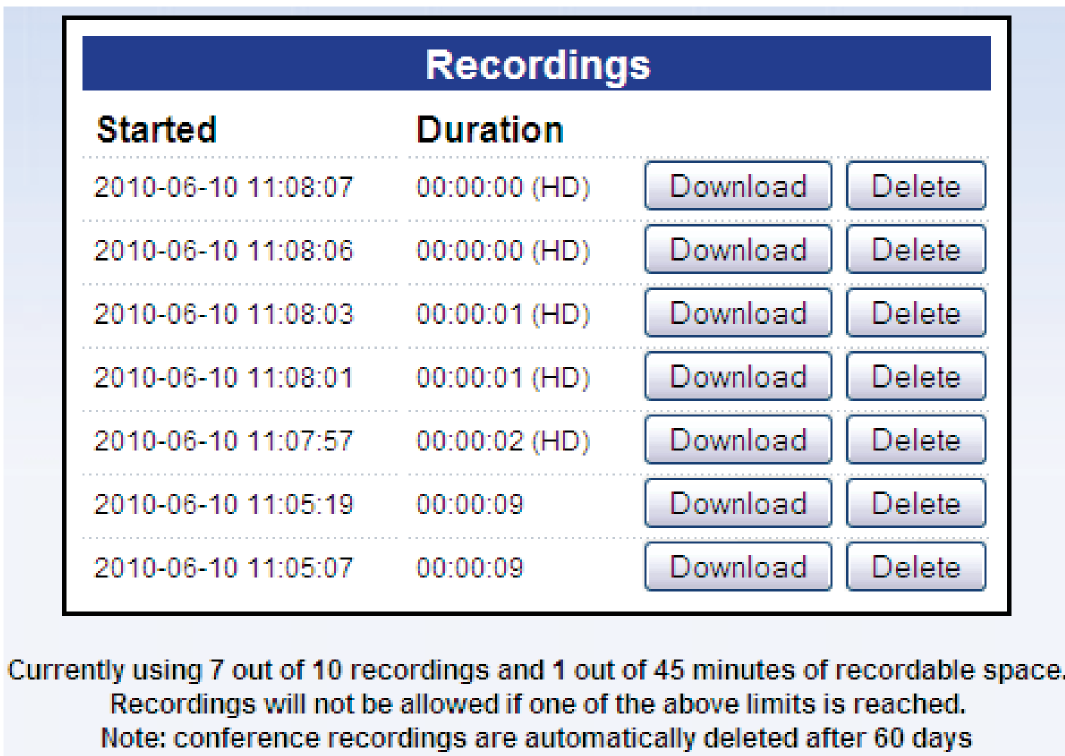
1.5 Recordings

The Recordings window allows you to view and manage any conference recordings that you have made.

Your service provider may choose to disable the recording function so that you cannot record your conferences. If you have previously been permitted to record conferences and have one or more stored recordings, you can still access these, but you cannot record any further conferences.

Click on the **Recordings** button to display this window.

Figure 7. Recordings window



The screen shows the start time and duration of each recording and, if your service level permits HD audio, whether or not the conference was recorded in HD audio. It may also display a message to inform you that one or more of your conference recordings will be automatically deleted after a specified time. You can download these recordings to your local computer if you need to store them for future reference.

- To listen to a recording or save it to your local computer, click on the **Download** button next to the recording.
- To delete a recording when you no longer need it, click on the **Delete** button next to the recording.

The screen also shows the following information, relating to the recording limits permitted by your Class of Service:

- The number of recordings you currently have stored on the server, compared with the maximum permitted number.
- The total time of recordings you currently have stored on the server, compared with the maximum permitted time.

Conferences are recorded in high-definition if your service level permits HD audio and at least two participants (which may include you as the moderator) use HD audio simultaneously either before or during the conference recording.

You will not be able to start recording a conference if you have reached the maximum number of recordings permitted by your Class of Service, or if you have less than one minute remaining of the maximum recording time permitted by your Class of Service. Also, if you are recording a conference and you reach the maximum recording time permitted by your Class of Service, the current recording will stop.

In these cases, you will need to delete one or more recordings that you no longer need, in order to make room for new ones. Alternatively, you may need to contact your service provider about upgrading to a different Class of Service that allows you more recordings.

If you have not yet reached the limits defined by your Class of Service, but you are still unable to start recording, please contact your service provider; this may indicate a problem on the Conferencing server.