



# User's Guide

Software Version 12.0

**Copyright © 2017 Compunetix, Inc.**

Reproduction in whole or in part without written permission is prohibited. All rights reserved.

Features and specifications are subject to change without notice.

Printed in the United States of America.

**Trademarks**

ConferenceManager and the Sonexis logo are trademarks of Compunetix, Inc.

Windows, Windows Microsoft SQL Server, JScript, ActiveX, Active Directory, Excel, Forefront, Outlook, and Visual C++ are registered trademarks of Microsoft Corporation.

Pentium and Intel are registered trademarks of Intel Corporation.

Adobe and Acrobat are registered trademarks of Adobe Systems Incorporated.

Other company or product names mentioned herein may be trademarks or registered trademarks of their respective companies.

**Disclaimer:** This Operator's Guide is meant as a general guide to configuring and administering the conferencing system. Not every configuration or problem can be anticipated given the variations in all hardware and software products. Compunetix, Inc. accepts no responsibility for errors or omissions contained in this Guide.

**Compunetix, Inc.**

978-640-2000

[www.sonexis.com](http://www.sonexis.com)

[CustomerCare@sonexis.com](mailto:CustomerCare@sonexis.com)

**Headquarters:**

2420 Mossside Boulevard  
Pittsburgh, PA 15146

**Technology Center:**

50 High Street, Suite 27  
North Andover, MA 01845

# Contents

<b>Chapter 1: Getting Started</b>	<b>1</b>
Logging In to ConferenceManager .....	2
Logging in as a Host .....	3
Changing Your PIN Upon Login .....	3
Retrieving Login Information .....	4
Testing Your System .....	5
Installing Optional Components .....	7
Getting Help .....	8
<b>Chapter 2: Managing Your Account</b>	<b>9</b>
Using the My Conferences Page .....	10
Managing Scheduled Conferences .....	13
Managing Saved Conferences .....	15
Managing Recorded Conferences .....	16
Editing Your Account Information .....	17
Changing Your PIN .....	18
Setting Your Host Preferences .....	19
Viewing Your Delegates .....	24
Using Your Address Book .....	25
Opening Your Address Book .....	25
Adding Contacts .....	25
Importing Contacts .....	27
Editing Contacts .....	29
Deleting Contacts .....	29
<b>Chapter 3: Scheduling Conferences</b>	<b>31</b>
Scheduling Conferences with ConferenceManager .....	32
Scheduling Recurring Conferences .....	36
Checking Port Availability .....	38
Scheduling Conferences with Outlook .....	39

---

Configuring Outlook Options .....	39
Scheduling Your Own Conference Using Outlook .....	41
Allowing a Delegate to Schedule Conferences .....	43
About Conference Invitations .....	47
Pre-Setting a Web Conference Room .....	48
Modifying Scheduled Conferences .....	49
Canceling Scheduled Conferences .....	50
Canceling a Conference through ConferenceManager .....	50
Canceling a Conference through Outlook .....	50
<b>Chapter 4: Starting and Ending Conferences</b>	<b>51</b>
Starting Scheduled Conferences .....	52
Starting a Conference by Phone .....	52
Starting a Conference by Web .....	52
Starting a Conference by Automatic Dialout .....	53
Starting Ad-Hoc Conferences .....	54
Starting an Ad-Hoc Audio Conference by Phone .....	54
Starting an Ad-Hoc Audio Conference via Skype .....	55
Starting an Ad-Hoc Conference by Web .....	56
Starting Preset Conferences .....	59
Editing Conferences in Progress .....	60
Ending or Leaving Conferences .....	61
Ending or Leaving by Phone .....	61
Ending or Leaving a Conference from the Conference Room .....	62
Ending a Conference from the My Conferences Page .....	63
Rejoining a Conference in Progress .....	64
<b>Chapter 5: Leading an Audio Conference</b>	<b>65</b>
Controlling a Conference by Phone .....	66
Recording Greetings .....	67
About the Audio Console .....	69
Managing an Audio Conference from the Console .....	71
Dialing Out from the Audio Console .....	72
Dial Out Controls .....	72
Screened Dial Out .....	73
Blast Dial .....	75
Managing Participants .....	77
Sending a Quick Invitation .....	79
Conferencing in Private .....	80

---

Recording Conference Audio .....	.81
<b>Chapter 6: Leading a Web Conference</b>	<b>83</b>
About the Conference Room .....	84
Setting Conference Room Preferences .....	87
Monitoring Participants .....	89
Viewing the Invitee List .....	90
Sending a Quick Invitation .....	90
Interacting with Participants .....	91
Using Webcam Video .....	91
Recognizing Raised Hands .....	94
Taking a Quick Vote .....	94
Chatting With Participants .....	95
Interacting with Q & A .....	96
Polling Participants .....	98
Transferring Leadership .....	101
Sharing Documents .....	102
Uploading Documents to the Conference Room .....	102
Converting Unsupported Document Types .....	103
Viewing and Annotating Shared Documents .....	104
Using the Annotation Tools .....	104
Sharing Applications .....	106
Application vs. Desktop Sharing .....	106
Starting Application Sharing .....	107
Granting and Regaining Control .....	108
Pausing and Resuming Sharing .....	109
Selecting a New Application to Share .....	110
Stopping Sharing .....	110
Working with the Conference Room Tools .....	111
Using the Whiteboard .....	111
Taking Notes .....	111
Conducting Q & A .....	111
<b>Chapter 7: Acting as a Delegate</b>	<b>113</b>
Selecting a Host Account .....	114
Acting on Behalf of a Delegated Host .....	115
Managing Delegated Accounts .....	117
One-Click Account Creation .....	117
Adding and Editing Accounts .....	118
Deleting Accounts .....	119

---

---

Viewing Your Delegates .....	120
<b>Chapter 8: Recording and Saving Conferences</b>	<b>121</b>
Recording Audio Conferences .....	122
Recording Web Conferences .....	122
Downloading and Playing Recorded Conferences .....	122
Deleting Recorded Conferences .....	123
Working with Saved Conferences .....	124
Saving a Conference .....	124
Managing Saved Conferences .....	125
Entering a Saved Conference Room .....	126
Hosting a Follow-up Conference .....	126
Deleting a Saved Conference .....	127
<b>Appendix A: Time Zone Expressions</b>	<b>129</b>
<b>Appendix B: Quick Reference Cards</b>	<b>133</b>
Account Setup .....	134
Application Sharing .....	136
Conference Room Setup .....	138
Scheduling with Outlook .....	140
Conferencing via Phone .....	142
Web Conferencing Basics .....	144
<b>Index</b>	<b>147</b>

# Chapter 1: Getting Started

ConferenceManager is an integrated, premises-based audio and web conferencing system designed to improve enterprise business processes and communications while significantly reducing conferencing costs. The ConferenceManager system is easy to use, maintains security of sensitive corporate information, requires low administrative overhead, and leverages existing network investments.

The *ConferenceManager User's Guide* is primarily designed to help hosts schedule, manage, and lead audio and web conferences. [The "Participating in a Conference" chapter](#) describes conferences from a participant's point of view.

This chapter contains the following sections:

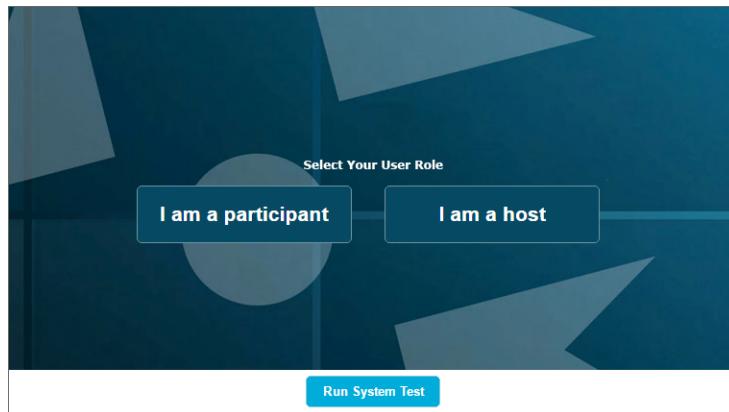
Logging In to ConferenceManager .....	2
Testing Your System .....	5
Installing Optional Components .....	7
Getting Help .....	8

## A note about Classes of Service

Your ConferenceManager account is assigned to a Class of Service (or CoS) that determines the system features that you may access. Contact your administrator if you have any questions.

## Logging In to ConferenceManager

You access the ConferenceManager Log In page by navigating to the conferencing system URL provided by your administrator.



The Log In page provides access to the Participant Log In page, Host Log In page, and System Test utility:

- Participants log in to the conferencing system to join web conferences; they need a Conference ID and sometimes a PIN or password if the host requires it. See “[Joining Conferences as a Participant](#)”.
- Hosts log in to schedule and manage conferences and their account information; they need a Conference ID and PIN to log in.  
Operators and Conference/Tenant Administrators also log in as hosts.
- All new users should run the [system test](#) to verify and optimize compatibility with the conferencing system (see “[Testing Your System](#)” on page 5).

This section discusses the following topics:

<a href="#">Logging in as a Host</a> .....	3
<a href="#">Changing Your PIN Upon Login</a> .....	3
<a href="#">Retrieving Login Information</a> .....	4

## Logging in as a Host

You can log into ConferenceManager as a host if you already have a host account. If you do not have an account, your administrator or delegate can create one for you.

To log in:

- Step 1.** From the Log In page, click **I am a host**.

The Host Log In page appears.



The image shows a screenshot of the Host Log In page. It features a light blue header bar with the text "Conference ID:" followed by a text input field. Below it is another text input field labeled "PIN:". To the right of the PIN field is a checkbox labeled "Remember me". At the bottom right is a large blue "Log In" button. At the bottom left is a link labeled "Forgot ID or PIN" with a small icon.

If you have an account but have forgotten the login information, click **Forgot ID or PIN** and see "[Retrieving Login Information](#)" on the next page.

- Step 2.** Enter your **Conference ID** and **PIN**.

Your Conference ID is 4-12 characters; your PIN is 4-8 characters. The administrator has options to set a minimum PIN length, and to require that you cannot use your Conference ID as your PIN.

To save your ID on your computer, select **Remember me**.

- Step 3.** Click **Log In**.

The My Conferences page appears; See "[Using the My Conferences Page](#)" on page 10 for brief descriptions of each section.

- Step 4.** If you have not yet run the system test, click **System Test**.

See "[Testing Your System](#)" on page 5.

## Changing Your PIN Upon Login

There are a few general cases where you may be required to change your PIN upon login:

- If your account is new, your administrator may require you to change your PIN when you first log in.
- If the administrator changes the conferencing system settings such that your PIN is no longer valid (e.g., it is too short, or it is identical to your Conference ID), you must change your PIN to meet the new requirements.
- If your administrator has set PINs to expire after a given period of time, you will receive a warning prior to the PIN expiration. You may change it when prompted or click **Change Later** until the expiration date arrives.
- If your Class of Service dictates that your host PIN and participant PIN must match, and your host PIN is already in use as a participant PIN.

When prompted, enter your **Existing PIN** and the **New PIN** twice, and click **Enter**.

The image contains two side-by-side screenshots of a web-based application interface. The left screenshot shows a message box with the text: "Your PIN will expire in 4 days. You may change your PIN or press 'Change later' to change it later." Below this are three input fields with red asterisks: "Existing PIN:", "New PIN:", and "Confirm New PIN:". At the bottom are two buttons: "Enter" and "Change Later". The right screenshot shows a larger form titled "Change PIN for Host ID: 0000". It has three input fields with red asterisks: "Existing PIN:", "New PIN:", and "Confirm New PIN:". To the right of these fields is a large blue "Enter" button.

## Retrieving Login Information

If you forget a Conference ID or PIN, the conferencing system can send them to you.

To retrieve your login information:

- Step 1.** From the **I am a host** page, click **Forgot ID or PIN**

The Forgot Log In Information window appears.

- Step 2.** Enter the **Email Address** associated with your account and click **OK**.

The conferencing system emails your Conference ID and PIN to you.

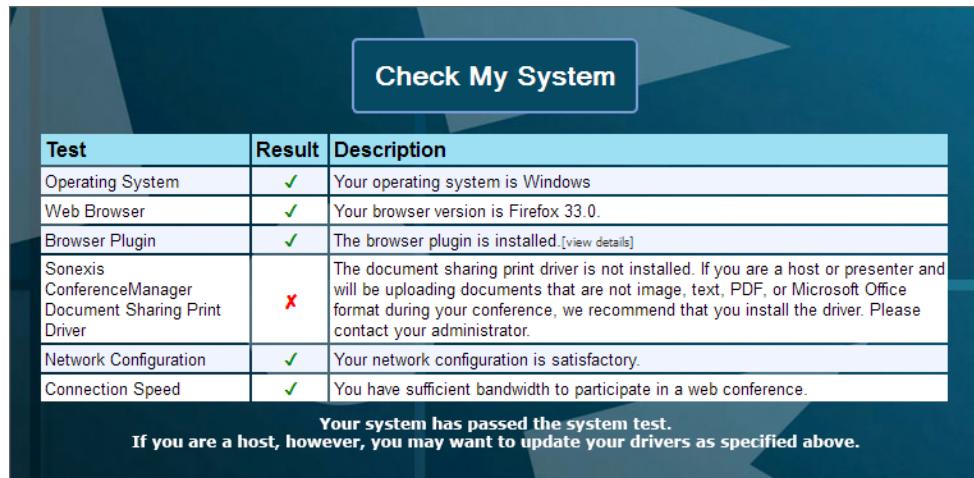
## Testing Your System

The System Test utility runs a suite of tests on your PC to ensure that it can provide the best conferencing experience. Hosts and participants should run System Test when they first log in to the conferencing system.

Test	Description
Operating System	Verifies that the operating system is supported.
Web Browser	Verifies that the browser is supported.
Browser Plugin	<p>Verifies that your browser has loaded the ConferenceManager browser plugin (Windows-only: an ActiveX plugin for IE; or an NPAPI plugin for Firefox), which is required for the following conferencing features:</p> <ul style="list-style-type: none"> <li>■ Application/Desktop sharing</li> <li>■ Browser/Outlook integration (varies by browser) <ul style="list-style-type: none"> <li>&gt; Access to the Outlook Address Book (IE/Chrome/Firefox on Windows)</li> <li>&gt; Access to Outlook free/busy information (IE on Windows)</li> </ul> </li> <li>■ Sharing Office documents</li> <li>■ Uploading converted documents (if the Document Sharing Print Driver is installed)</li> <li>■ Some remote control keyboard support (task switching, clipboard access)</li> </ul> <p>Additional plugins are required (links are provided) to support Chrome on Windows and Application/Desktop Sharing on the Mac.</p>
Document Sharing Print Driver	Checks for the Document Sharing driver, and provides an installation link if not present. (See " <a href="#">Installing Optional Components</a> " on page 7).
Network Configuration	Verifies that the network connection can support at least six concurrent connections.
Connection Speed	Verifies that there is sufficient bandwidth to participate in a web conference.

To run the System Test:

- Step 1. From the Login page, click **Run System Test**.
- Step 2. If a Security Warning appears, click **Yes**.  
The System Test page appears.
- Step 3. Click **I am a participant** or **I am a host**, as appropriate.
- Step 4. Click **Check My System**.  
The System Test page displays the test results.



The test results indicate success or failure; the Description provides next steps for any failed items and a download link if necessary.

## Installing Optional Components

The My Account page contains links to optional ConferenceManager Add-Ins. If your Class of Service Allows Web Downloads, you will be prompted to install components as required.

From the [My Account page](#), you can download the following components manually, as allowed by your Class of Service:

Component	Description	Installer
Outlook Add-In	Integrates ConferenceManager with the Microsoft Outlook Calendar and Address Book.	cmoutlook_user.exe
Document Sharing Print Driver	Allows you to upload documents to web conferences.	DocSharePrintDrvNT.exe
Skype for Business Add-In	Allows you to create ad-hoc audio conferences via Microsoft Skype for Business.	cm_lync.exe

If you have not yet run the System Test, see "[Testing Your System](#)" on page 5; your administrator may have already installed these components on your system.

The process to install these components is generally:

**Step 1.** From the **My Conferences** page, click **My Account**.

**Step 2.** Click the link for the add-in you wish to install.

Depending upon your browser and Windows settings, you may be prompted to download the installer (in which case you need to launch it from your Downloads folder) or you may be allowed to run it immediately from within the browser.

**Step 3.** Launch the installer and click **Next** or **Install** to install the software.

**Step 4.** When the installation is complete, click **Finish**.

## Getting Help

The **Help** tab, available on every screen, provides access to context-sensitive online help and to the complete ConferenceManager documentation set in PDF format.

To access online help, click the **Help** tab on any administrator page.

To access documentation in PDF format, select any of the following documents from the Online Help's Table of Contents:

- The [\*User's Guide\*](#) describes how to host, lead, and participate in conferences.
- The Quick Reference cards summarize key ConferenceManager tasks and features.

## Contacting Customer Care

You can reach Sonexis Customer Care by phone at 866.676.6394 Monday - Friday, 8am to 8pm EST, or by email at [CustomerCare@sonexis.com](mailto:CustomerCare@sonexis.com).

-  SonexisSupport
-  SonexisSupport
-  @SonexisSupport

# Chapter 2: Managing Your Account

After logging in, your My Conferences page is where you schedule and manage conferences, manage your account and preferences, and access your address books.

This chapter contains the following sections:

Using the My Conferences Page .....	10
Editing Your Account Information .....	17
Changing Your PIN .....	18
Setting Your Host Preferences .....	19
Viewing Your Delegates .....	24
Using Your Address Book .....	25

## A note about Classes of Service

Your ConferenceManager account is assigned to a Class of Service (or CoS) that determines the system features that you may access. Contact your administrator if you have any questions.

## Using the My Conferences Page

The **My Conferences** page is the central point from which you schedule and manage your conferences.

There are three main tabs:

- [Conferencing](#)
- [Saved Conferences](#)
- [Recorded Conferences](#)

This section introduces the page and references other chapters for more information; the topics that follow describe each tab.

The screenshot shows the 'My Conferences' page with the following details:

**Header:** My Conferences  
Last valid login: 7/5/2017 4:34:19 PM from 172.26.1.18  
Last invalid login:

**Tabs:** Conferencing (selected), Saved Conferences, Recorded Conferences, Select Account

**Buttons:** Conference Now, Conference Later, Conference ID: 4222, Dial In Number: 2280

**Scheduled Conferences Table:**

Date	Time	Duration	Recur	Record	Audio	Web	Subject
Today	1:00 PM	1:00	↻	■	8	8	Weekly Staff Meeting
Today	1:00 PM	1:00	●		2	2	Sales Demo
20-Jul-2017	3:30 PM	1:00	↻		4	4	Weekly Staff Meeting
24-Jul-2017	10:00 AM	1:00	↻	■	20	20	Eileen's Project Review
27-Jul-2017	1:00 PM	1:00	↻	■	8	8	Weekly Staff Meeting

**Calendar:** July 2017

**Buttons:** Send Update, Start, Set Up, Edit..., End...

**Footer:** My Address Book, My Account, Change My PIN, My Preferences, Help, Operator Console, Participant Log In, Log Out

The My Conferences page may display the following controls:

Item	Description	For More Information See
<b>Upper Window</b>		
[Header]	Identifies the My Conferences page; it may also display the date, time, and IP for the previous valid/invalid logins.	
Conference Now	Starts an ad-hoc Conference immediately, using the default options/preferences. Click the arrow on the right side of the button and select <b>Options</b> to start the Conference Now wizard and customize conference options.	"Starting Ad-Hoc Conferences" on page 54
Conference Later	Starts the Conference Later wizard to reserve ports for a scheduled conference.	"Scheduling Conferences with ConferenceManager" on page 32
Select Account <i>(Delegates only)</i>	Allows delegates to select a delegated account.	Chapter 7, "Acting as a Delegate"
My Conference ID	The conference ID used to log in (or a selected delegated account).	"Logging In to ConferenceManager" on page 2
Dial In Number	The number with which to access the conference.	"Scheduling Conferences with ConferenceManager" on page 32
<b>Lower Window</b>		
My Address Book	Opens your Address Book.	"Using Your Address Book" on page 25
My Account	Displays your account settings.	"Editing Your Account Information" on page 17
Change My PIN	Allows you to change your PIN.	"Changing Your PIN" on page 18
My Preferences	Displays your preferences.	"Setting Your Host Preferences" on page 19
My Delegates	Displays a list of your delegates (appears only for accounts with delegates).	"Viewing Your Delegates" on page 120
Help	Displays this online help.	

Item	Description	For More Information See
Operator Console	Displays the Operator Console for conference management and user assistance (requires Allow Operator Console CoS).	<i>ConferenceManager Operator's Guide</i>
Conference Admin	Allows the host to log in as a Conference Administrator (requires Allow Administration CoS).	<i>ConferenceManager Conference Administrator's Guide</i>
Participant Log In	Allows the host to log into another host's conference without having to log out of their own My Conferences page.	"Joining a Web Conference"
Log Out	Logs you out of ConferenceManager.	

## Managing Scheduled Conferences

The Conferencing tab lists current and upcoming, scheduled conferences for a given month.

A screenshot of the Sonexis ConferenceManager software interface. At the top, there are three tabs: 'Conferencing' (which is selected and highlighted in blue), 'Saved Conferences', and 'Recorded Conferences'. Below the tabs, there are two buttons: 'Conference Now' and 'Conference Later'. To the right, it displays 'My Conference ID: 4270' and 'Dial In Number: 2280'. The main area is titled 'Scheduled Conferences' and contains a table with the following data:

Date	Time	Duration	Recur	Record	Audio	Web	Subject
Today	1:00 PM	1:00	2	8	8	8	Weekly Staff Meeting
Today	1:00 PM	1:00	2	2	2	2	Sales Demo
20-Jul-2017	3:30 PM	1:00	2	4	4	4	Weekly Staff Meeting
24-Jul-2017	10:00 AM	1:00	2	20	20	20	Eileen's Project Review
27-Jul-2017	1:00 PM	1:00	2	8	8	8	Weekly Staff Meeting

At the bottom of the screen, there is a date navigation bar showing 'July 2017' with previous and next month buttons. Below the date bar are several action buttons: 'Send Update', 'Enter', 'Set Up', 'Edit...', and 'End...'.

The following table describes this tab:

Item	Description
<b>Conference Data</b>	
Date	The scheduled conference date.
Time	The scheduled conference start time. A  icon indicates that the conference was not scheduled relative to your default time zone. Hover the pointer over the globe to display a tooltip with the time zone details.
Duration	The scheduled conference duration. Note that conferences are automatically extended while the room is being used, as long as there are ports available.
Recur	Indicates a recurring conference series:  indicates a recurring conference, while  indicates that a conference from the series was edited in some way. Hold the pointer over the icon to display a tooltip with the recurrence pattern.
Record	The  icon identifies conferences that are scheduled to have audio recorded.
Audio	The number of audio ports reserved for the conference.
Web	The number of web ports reserved for the conference.
Subject	The conference subject.
<b>Controls</b>	
[Month]	Click  or  to change the month displayed.
Send Update	[Re]Sends a conference invitation to invitees of the selected conference.
Enter / Start	Enters an ongoing conference, or starts the selected conference up to 15 minutes before its scheduled start time. See " <a href="#">Starting Scheduled Conferences</a> " on page 52.
Set Up	Launches the selected conference room (without invitees) so you can prepare it for an upcoming conference. See " <a href="#">Pre-Setting a Web Conference Room</a> " on page 48.
Edit...	Edits the selected conference. See " <a href="#">Modifying Scheduled Conferences</a> " on page 49.
Cancel...	Cancels the selected conference. See " <a href="#">Canceling Scheduled Conferences</a> " on page 50.

## Managing Saved Conferences

The Saved Conferences tab lists conferences from which you have saved the conference preferences, list of invitees, and the web (conference room) portion if there was one.

Conference Data				
Item	Description			
Date	The conference date.			
Time	The conference start time. A globe icon (⌚) indicates that the conference was not scheduled relative to your default time zone. Hover your pointer over the globe to display a tooltip with the time zone details.			
Duration	The actual conference duration.			
Type	The conference type — Audio, Web, or Audio+Web.			
Subject	The conference subject.			
<b>Controls</b>				
Enter Room	Launches the selected conference room (with no invitees), if the conference has a web component. See "Working with Saved Conferences" on page 124.			
Invitee List	Displays a list of conference invitees. Click one of the <b>Follow Up</b> buttons to create another conference with the same invitee list.			
Follow Up Now	Allows you to start a follow-up conference based on the selected conference, using the same Invitee List. (Your CoS must Allow Adhoc.) See "Hosting a Follow-up Conference" on page 126.			
Follow Up Later	Schedules a follow-up conference based on the selected conference, using the same Invitee List. (Your CoS must Allow Reservations.)			
Delete...	Deletes the selected conference. See "Deleting a Saved Conference" on page 127.			

The following table describes this tab:

Item	Description
<b>Conference Data</b>	
Date	The conference date.
Time	The conference start time. A globe icon (⌚) indicates that the conference was not scheduled relative to your default time zone. Hover your pointer over the globe to display a tooltip with the time zone details.
Duration	The actual conference duration.
Type	The conference type — Audio, Web, or Audio+Web.
Subject	The conference subject.
<b>Controls</b>	
Enter Room	Launches the selected conference room (with no invitees), if the conference has a web component. See "Working with Saved Conferences" on page 124.
Invitee List	Displays a list of conference invitees. Click one of the <b>Follow Up</b> buttons to create another conference with the same invitee list.
Follow Up Now	Allows you to start a follow-up conference based on the selected conference, using the same Invitee List. (Your CoS must Allow Adhoc.) See "Hosting a Follow-up Conference" on page 126.
Follow Up Later	Schedules a follow-up conference based on the selected conference, using the same Invitee List. (Your CoS must Allow Reservations.)
Delete...	Deletes the selected conference. See "Deleting a Saved Conference" on page 127.

## Managing Recorded Conferences

The Recorded Conferences tab lists conference recordings that you have saved.

Date and Time Recorded	Expiration	Length	Size	Audio	Web	Subject
16-Jun-2017 12:39 PM	23-Jun-2017 02:00 AM	00:20:49	Encoding...			Triage
10-Jun-2017 10:30 AM	17-Jun-2017 02:00 AM	00:15:34	3.1 MB			Rehearsal

2 Items Items per page: 25 Go << prev Page 1 of 1 next >> Play... Download... Delete...

The following table describes this tab:

Item	Description
<b>Conference Data</b>	
Date and Time Recorded	<p>The conference date and time.</p> <p>A globe icon ( ) indicates that the conference was not scheduled relative to your default time zone. Hover the pointer over the globe to display a tooltip with the time zone details.</p>
Expiration	The time at which the recording will be automatically deleted from the ConferenceManager server, if your System Administrator set an expiration.
Length	The recording length in HH:MM:SS format (which may be shorter than the actual conference duration).
Size	<p>The size of the saved audio file.</p> <p>When a conference is first saved, this column displays “Encoding” to indicate that the file is being processed.</p> <p>See <a href="#">"Recording and Saving Conferences" on page 121</a>.</p>
Audio Web	Displays a phone icon ( ) or monitor icon ( ) to identify an audio or web recording, respectively.
Subject	Displays the conference subject.
<b>Controls</b>	
Play...	Plays the selected recording (CoS must Allow Playback Recording).
Download...	Downloads the selected recording. See <a href="#">"Downloading and Playing Recorded Conferences" on page 122</a> (CoS must Allow Download Recording).
Delete...	Deletes the selected recording (CoS must Allow Delete Recording).

## Editing Your Account Information

The My Account page allows you to update your account information and to download additional conferencing system components to assist you in planning and hosting conferences.

To update your account information (your CoS must Allow Account Edit):

- Step 1. From the My Conferences page, click **My Account**.

The My Account page appears.

**My Account**

\* First name: Emily  
\* Last name: Stone  
\* E-mail address: estone@example.com  
\* Time zone: (GMT-05:00) Eastern Time (US & Canada)  
Phone: \_\_\_\_\_ Extension: \_\_\_\_\_  
Conference Password: \_\_\_\_\_

Use the links below to download the following (most downloads require administrative privileges):

- [Outlook® Add-In](#) - to schedule conferences from Microsoft Outlook 2007® or newer (32 and 64 bit)
- [Skype for Business® Add-In](#) - to schedule conferences from Microsoft Skype for Business® (32 and 64 bit)
- [Document Sharing](#) - to upload documents for a web conference
- [Print Driver](#)

**Help** **Save** **Cancel**

- Step 2. Edit your account information as necessary:

Item	Description
First Name	Identifies you in web conferences, and appears in conference invitations.
Last Name	
Email Address	Address to which conference invitations are sent.
Time zone	Your time zone, for scheduling purposes.
Phone/Extension (optional)	Your phone number or SIP address; allows hosts to dial out to themselves.
Conference Password	If your CoS allows (or requires) it, you can create a 4-8 digit conference password for additional security; participants must enter this password to join your conferences, in addition to any PIN that may be required.
[Download links]	For information on downloads, see " <a href="#">Installing Optional Components</a> " on page 7.

- Step 3. Click **Save** to save your changes.

## Changing Your PIN

To change your PIN (your CoS must Allow Account Edit, and you cannot be using a temporary PIN):

- Step 1.** From the My Conferences page, click **Change My PIN**.

The Change PIN page appears.

The screenshot shows a web-based form titled "Change PIN for Host ID: 0000". The form contains three text input fields, each with a red asterisk (\*) preceding the label: "Existing PIN", "New PIN", and "Confirm New PIN". Below these fields is a blue rectangular button with the text "Enter" and a small yellow arrow pointing to the right.

- Step 2.** Enter your **Existing PIN**.

- Step 3.** Enter your **New PIN** and enter it again in the **Confirm New PIN** field.

- Step 4.** Click **Enter**.

## Setting Your Host Preferences

Your My Preferences page contains various Participant, Conference, and Host settings that apply as defaults to each conference you host. Some of these defaults can be changed on a per-conference basis when [scheduling](#) the conference.

To set the default participant and conference preferences (your CoS must Allow Preferences Edit, and your System Administrator may also restrict which preferences can be edited):

- Step 1. From the **My Conferences** page, click **My Preferences**.

The My Preferences page appears.

The screenshot shows the 'My Preferences' configuration window with three main sections: Participant Preferences, Conference Preferences, and Host Preferences.

- Participant Preferences:**
  - Participant security level: Use Conference ID only
  - Participant waiting room: Play hold music
  - Participant announcement method: By a tone
  - Allow Participant Dialouts:
- Conference Preferences:**
  - Ad-hoc conferences: Host must be present to start
  - Audio Entry options: Prompt caller to determine if they are the host
  - When I'm not present in the conference: End conference after 15 minutes
  - When the conference ends: Delete the conference room
  - When the conference starts: Start in normal mode
  - When in lecture mode: Do not allow participants to mute/unmute
  - Blast Dial Startup Options: Do not Blast Dial
  - Back-to-back Meeting Options: Transition all connections into the meeting
  - When there's only one audio connection: Do nothing
  - Record audio when the conference starts:
  - Send Conference Report email to host:
- Host Preferences:**
  - Include phone numbers of type:  Work  Home  Mobile
  - Web Conference options:  Allow chat  Allow quick vote  Allow who is here  Allow webcam
  - Anyone can:  Upload Documents  Add Annotations
  - Tab Options:  Allow tab switching  Share all tabs
  - Sort participants:

At the bottom right are 'Save' and 'Cancel' buttons.

**Step 2.** Set your **Participant**, **Conference**, and **Host** preferences (default settings are displayed in **bold**, though administrators are able to change the defaults):

Setting	Options
<b>Participant Preferences</b>	
Participant security level	<ul style="list-style-type: none"> <li>■ <b>Use Conference ID only:</b> Only the Conference ID is required to join the conference.</li> <li>■ Create PINs for participants: The Conference ID and a PIN is required to join the conference. Each participant is assigned a PIN when the conference is scheduled. If your administrator allows Persistent Participant PINs, participants are assigned the same PIN for every conference.</li> <li>■ Create Optional PINs for participants: The Conference ID is required to join the conference, though a PIN is optional. Participants may enter the PIN assigned to them when conference was scheduled, or (if your administrator allows Persistent Participant PINs) they may have an existing PIN that identifies them.</li> </ul>
Participant waiting room	<p>If the Ad-Hoc conferences setting allows participants to start the conference without the host, you may select:</p> <ul style="list-style-type: none"> <li>■ Allow participants to talk: Participants that join the conference prior to the host may speak with one another (unless the conference is set to begin in lecture mode).</li> <li>■ <b>Play hold music:</b> Participants that join the conference prior to the host are placed on hold until the host arrives.</li> </ul>
Participant announcement method	<ul style="list-style-type: none"> <li>■ By recorded name: participants record their names when they first dial in to an audio conference. The recording is played as they enter or leave an audio conference, and when the host requests a roll call by name. Announcements may be useful in small conferences, but may frequently interrupt large conferences.</li> <li>■ <b>By a tone:</b> A tone plays each time a participant enters or leaves an audio conference. Roll call by name is unavailable.</li> <li>■ No announcement: No audio cues are played when participants enter or leave an audio conference. Roll call by name is unavailable.</li> </ul>
Allow Participant Dialouts	If your CoS allows Participant Dial Out, you can elect to enable that feature. See " <a href="#">Dialing Out to Yourself</a> ".
<b>Conference Preferences</b>	
Ad-Hoc conferences	<ul style="list-style-type: none"> <li>■ <b>Host must be present to start:</b> Participants cannot start an ad-hoc conference prior to the host arriving.</li> <li>■ Participants can start without host: Participants may start an ad-hoc conference without the host present.</li> </ul>

Setting	Options
Audio Entry Options	<ul style="list-style-type: none"> <li>■ <b>Prompt caller to determine if they are the host:</b> Until the host arrives, each caller is prompted to indicate whether they are the host or a participant.</li> <li>■ Do not prompt caller and assume they are a participant: All callers are assumed to be participants. This option is not available if the Ad-Hoc Conferences setting requires that a host be present to start.</li> <li>■ Caller automatically starts the conference as the host: The host can enter without hearing the 'are you the host' prompt; you can select whether or not a PIN is required.</li> </ul>
When I'm not present in the conference	<ul style="list-style-type: none"> <li>■ Continue the conference until the scheduled end time: The conference ends at the scheduled time.</li> <li>■ End the conference immediately: All connections are closed immediately.</li> <li>■ <b>End the conference after [1, 5, 15, 30, 45, 60, 90, 120, 180] minutes:</b> When you leave the conference, it continues for the specified amount of time. This setting also ends conferences that you allow to begin without you, if you have not joined the conference within the selected time frame.</li> <li>■ Allow conference to continue as long as there are ports available: If the conference continues beyond the scheduled end time, the conferencing system reserves ports if they are available; otherwise, the conference ends as scheduled.</li> </ul>
When the conference ends	<ul style="list-style-type: none"> <li>■ <b>Delete the conference room:</b> The conference room is deleted after the conference ends.</li> <li>■ Save the conference room: The conference room is saved when the conference ends; the host may access the saved conference from the My Conferences page.</li> </ul>
When the conference starts	<ul style="list-style-type: none"> <li>■ <b>Start in normal mode:</b> All conference participants may speak once the host joins the conference.</li> <li>■ Start in lecture mode: All participants are muted once they join the conference; this is equivalent to pressing *3 if leading the conference by phone, or clicking <b>mute all</b> if using the audio console.</li> </ul>
When in lecture mode	<ul style="list-style-type: none"> <li>■ <b>Do not allow participants to mute/unmute:</b> Conference participants cannot control call muting when in lecture mode.</li> <li>■ Allow participants to mute/unmute: Conference participants may mute/unmute their lines in lecture mode via the regular *2 combination.</li> </ul>

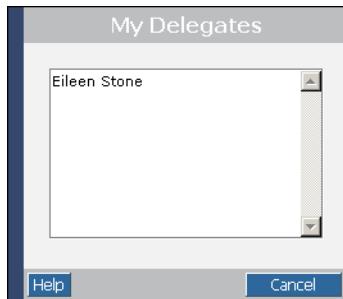
Setting	Options
Blast Dial startup options <i>(Blast Dial-licensed systems only, with Allow Blast Dial CoS)</i>	<ul style="list-style-type: none"> <li>■ <b>Do not Blast Dial:</b> Take no action when the host or participants join the conference.</li> <li>■ Blast dial to Invitees when the first person joins the Audio Conference: The first audio connection initiates a Blast Dial to the list of invitees.</li> <li>■ Blast dial to Invitees at the scheduled start time: The conferencing system initiates a Blast Dial to the list of invitees at the scheduled start time.</li> <li>■ Blast dial to My Address Book when the first person joins the Audio Conference: The first audio connection initiates a Blast Dial to all the phone numbers in My Address Book.</li> <li>■ Blast dial to My Address Book at the scheduled start time: The conferencing system initiates a Blast Dial to all the phone numbers in My Address Book at the scheduled start time.</li> <li>■ Blast dial to Invitees when the Host joins the Audio Conference: When the host joins, a Blast Dial is started to the list of invitees.</li> <li>■ Blast dial to My Address Book when the Host joins the Audio Conference: When the host joins, a Blast Dial is started to all the phone numbers in My Address Book.</li> </ul>
Back-to-Back Meeting options	<ul style="list-style-type: none"> <li>■ <b>Prompt the host to transition connections into the meeting:</b> The host determines whether connections from the first meeting are transferred into the second meeting.</li> <li>■ Transition only the host connection into the meeting: The host will be transferred into the second meeting; any other participants in the first meeting must manually join the second meeting.</li> <li>■ Transition all connections into the meeting: The host and any participants scheduled for the second meeting are automatically transferred.</li> <li>■ Do not transition any connections into the meeting: No connections are transferred; all callers must exit the current meeting and join the next meeting.</li> </ul>
When there's only one audio connection	<ul style="list-style-type: none"> <li>■ <b>Do Nothing:</b> The connection remains open (and silent).</li> <li>■ Play music: Music plays until a second attendee joins the conference.</li> </ul>
Record audio when the conference starts	Select <b>Record audio...</b> to enable conference recording by default (if licensed, and if your CoS Allows Recording); this option preselects the <b>Record audio</b> checkbox in the <a href="#">Conference Now/Conference Later</a> wizards.
Send Conference Report email to host	Select <b>Send Conference Report...</b> to receive a post-conference report that details each conference attendees' name, numbers, connection type, connection start/end times, and connection duration.
<b>Host Preferences</b>	
Include phone numbers of type	Select the phone number types that you would like to include in conference by default (requires Allow Invite Phones CoS).

Setting	Options
Web Conference options	Select whether web conference participants are able to use <a href="#">Chat</a> , <a href="#">Quick Vote</a> , <a href="#">Who is Here</a> , and <a href="#">Webcams</a> in the conference room.
Anyone can	Select whether web conference participants may upload documents or annotate uploaded documents.
Tab options	Select whether web conference participants are able to switch and share tabs.
Sort participants	Select the order in which to list participants in the Who is Here window of the conference room.
Host Dialout Options	<p>Specifies when to dial out to the host. Select <b>First Participant Joins</b> to dial out to the host when the first caller joins and the host is not present, at <b>Scheduled Start</b>, or some number of <b>Minutes before the scheduled start</b>.</p> <p>If one of these options is selected you also have the option to select <b>No PIN Required</b> to bypass prompts and add the host directly to the call.</p> <p>Also note that Host Dialout uses the phone number configured in your account settings as described in "<a href="#">Editing Your Account Information</a>" on page 17.</p>
Private Conference Names	If you wish to predefine private conference names for use with the Audio Console (see " <a href="#">Conferencing in Private</a> " on page 80), click on any of the eight buttons and enter the name.
Participant DTMF Access...	Determines whether audio conference participants may press <b>#1</b> to access the private conferences. After pressing <b>#1</b> , participants can press a number to enter a private conference (in order, left to right) or <b>0</b> to return to the main conference. For example, <b>#12</b> would place the participant into the second private conference, and <b>#10</b> would return them to the main conference.
<b>Operator Console Preferences</b>	
Prompt Operator for PIN	When selected, the Operator must enter their PIN upon answering, before being connected to the Operator Conference.
Display Fellow Operator Meetings	When selected, the Live Conferences tab displays Operator Conferences in addition to hosted conferences.
Auto Display All Live Meetings	When selected, conference panels for all live conferences are automatically displayed in the Conference View (without manually selecting them from the Live Conferences tab).
Operator Joining Conference Muted	When selected, the Operator is always muted when joining conferences.
Allow Operator Join Empty Conference	When selected, the Operator may join your conference even if empty.

**Step 3.** Click **Save**.

## Viewing Your Delegates

If your account is delegated (per the Allow Delegation CoS), a **My Delegates** button appears at the bottom of your My Conferences page. Click it display a list of delegates who may control your account (for scheduling conferences on your behalf, etc.). See [Chapter 7, "Acting as a Delegate"](#) for more information on delegates.



## Using Your Address Book

ConferenceManager provides an address book for storing your contacts' information; it is useful if you do not use Outlook or if you need to connect to the conferencing system in situations where Outlook is not available.

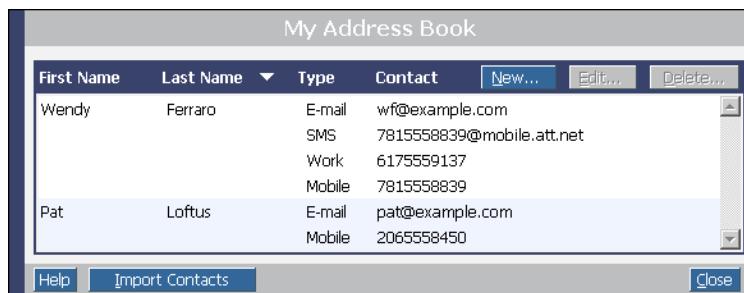
Opening Your Address Book .....	25
Adding Contacts .....	25
Importing Contacts .....	27
Editing Contacts .....	29
Deleting Contacts .....	29

### Opening Your Address Book

To open your address book:

- From the **My Conferences** page, click **My Address Book**.

Your address book appears.



If your system is licensed for Blast Dial, each contact's phone numbers are displayed in order per their Blast Dial setting (see "[Adding Contacts Manually](#)" on the next page).

### Adding Contacts

You can add new people to your address book by [copying them](#) from the Global Address Book or from Outlook, or you can [enter new information manually](#) (your CoS must Allow Address Book Edit).

#### ***Copying Contacts from Other Address Books***

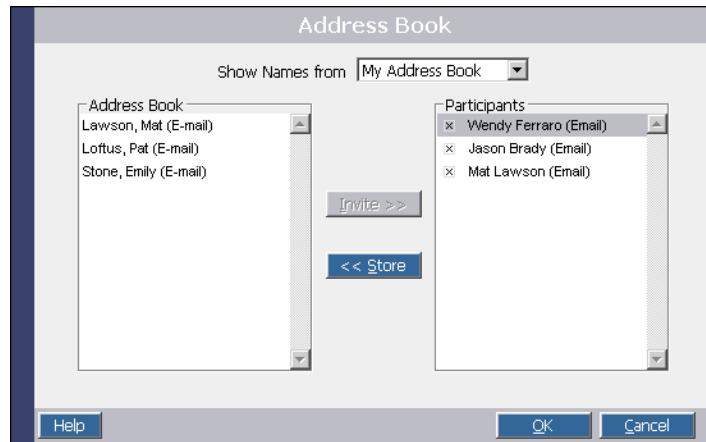
When you schedule a conference with the **Conference Now** or **Conference Later** wizards, you can copy contacts from the Global Address Book or from Outlook into your address book.

Before you can add Outlook contacts to your address book, you must use the Outlook address book to add them to the participants list when scheduling a conference.

To copy entries during scheduling:

- From the **Participants** page of the Conference Now or Conference Later wizards, click **Address Book**.

The Address Book window appears, displaying your address book entries in the left panel and the current conference participants in the right panel.



- Step 2.** Select **My Address Book** from the **Show Names From** list.
- Step 3.** For each entry you want to copy, select a name from the right-hand list and click **Store** to add it to your address book.
- Step 4.** Click **OK**.

#### ***Adding Contacts Manually***

To manually add a new contact to your address book:

- Step 1.** From the **My Conferences** page, click **My Address Book**.

Your address book appears.

- Step 2.** Click **New**.

Entry fields display at the bottom of the window.

First Name	Last Name	Type	Contact
Wendy	Ferraro	E-mail	wf@example.com
		SMS	7815558839@mobile.att.net
		Work	6175559137
		Mobile	7815558839
Pat	Loftus	E-mail	pat@example.com
		Mobile	2065558450

\* First Name: Stephen      \* Last Name: Pearson  
 E-mail:   
 SMS:  (none)  
 Work: 4135558191      Home:       Mobile:   
 Save      Cancel  
 Help      Import Contacts      Close

- Step 3.** Enter the information you have for the contact:

- **First Name** and **Last Name**
- **Email address**

You can use up to three email addresses for each contact by using the pull-down list.

- **SMS** address (Short Message Service, e.g., text messaging)

You can enter a provider name or select one of the more common provider extensions from the list.

- **Work, Home, and Mobile** phone numbers

If your system is licensed for SIP, you may also enter a SIP address in place of a phone number. If your system is licensed for Blast Dial, the Blast Dial selection determines the order of these fields.

Once added, you may append one or more of the following suffixes to participant phone numbers:

- **J:** Join on Answer — when answered, the participant is placed into the conference.
- **L:** Lecture Mode — when answered, the participant is placed into the conference and muted.
- **G:** Greeting Mode — when answered, the account's greeting (or the Blastdial prompt, if no greeting is associated with the account) is played three times and then the call is disconnected; useful for blast-dialed robocalls.

- **SIP** address (SIP-licensed systems only)

- **Blast Dial** (Blast Dial-licensed systems only)

Select the priority order for Blast Dialing the contact: All at Once, or any combination of Mobile, Work, and Home (the default order).

You must fill in First Name, Last Name, and at least one other field before you can save the contact.

**Step 4.** Click **Save** to add the entry to the address book.

**Step 5.** Click **Close** when you finish adding contacts.

## Importing Contacts

You can import contacts into the your address book from a Comma Separated Value (CSV) file. You can import new entries, or you have the option of deleting all existing entries before replacing them with the contacts of the CSV file (your CoS must Allow Address Book Edit).

Import a CSV file with the following fields in any order to specify the necessary information to create new contacts:

Item	Description	Data Type	Required
FirstName	First name of the contact	1-25 characters	Yes
LastName	Last Name of the contact	1-25 characters	Yes
Email	Contact's primary email address	Valid email address	No*
Email2	Alternate email address	Valid email address	No
Email3	Alternate email address	Valid email address	No
SMS	SMS of the contact	Valid SMS address	No*
SIPAddress	SIP address of the contact	Valid SIP address	No*

Item	Description	Data Type	Required
Work	Contact's work phone.	Valid phone number	No*
Home	Contact's home phone	Valid phone number	No*
Mobile	Contact's mobile phone	Valid phone number	No*
BlastDialOrder	(Blast Dial-licensed systems only) Determines whether phone numbers are dialed all at once, or in a given order	3 characters (WMH, in any order)**	No**

\* Each address book record must contain a FirstName, LastName, and at least one other field (Email, SMS, SIPAddress, or phone number). You may also append a **J** suffix to have the participant join the conference automatically without prompting (for auto dialouts), and/or an **L** suffix to have the participant join in Lecture Mode (muted).

\*\* If BlastDialOrder is not specified, or contains anything other than the three characters (W, M, and H, in any order) BlastDialOrder defaults to All at Once.

The first row of the CSV file must contain each column heading in exactly the form specified above; column headings are case-sensitive. If data contains a comma, it must be enclosed in quotation marks.

For example, a sample CSV file to import contacts might look like this:

```
FirstName,LastName,Email,Email2,Email3,SMS,SIPAddress,Work,Home,Mobile,BlastDialOrder
Joanne,Rice,jrice@example.com,,,,,800-555-1212, 781-555-2290, 617-555-5555,
WMH
Bob,Woodard,bwood@example.com,woodb@example.com,,,,,888-CALLBOB,MHW
Amy,Jensen,ajensen@example.com,CFO@example.com,,,800-555-1212,,213-555-1212
```

To add contacts to your address book by importing a CSV file (using the sample data above):

- Step 1. From the **My Conferences** page, click **My Address Book**.
- Step 2. Click **Import Contacts**.
- Step 3. Enter the file name or click **Browse** to locate the CSV file with your contact data.
- Step 4. If you wish to delete all existing entries in the address book before importing contacts from the CSV file, select **Delete all entries before Importing**.  
Otherwise (by default), existing entries are overwritten with the new data if the First and Last names match. If either one does not match, a new entry is created.
- Step 5. Click **Next** when you have specified the CSV file.

The import confirmation displays the data from the CSV file. Review the data and any errors displayed.

**Import Contacts**

Preview of C:\Documents and Settings\adrian\Desktop\newcontacts.txt									
FirstName	LastName	Email	Email 2	Email 3	SMS	SIP	Work	Home	Mobile
Joanne	Rice	jrice@example.com					800-555-1212	781-555-2290	617-555-5555
Bob	Woodard	bwood@example.com	woodb@example.com						888-CALLBOB
Amy	Jensen	ajensen@example.com	CFO@example.com				800-555-1212		213-555-1212

If you need to make changes, click **Cancel**, correct the CSV file, and repeat the import process. Verify that you are importing the intended information, as all existing address book entries are replaced with the data you import. Click **Finish** to display the import results.

- Step 6.** Click **Close** to close the Import Contacts wizard.

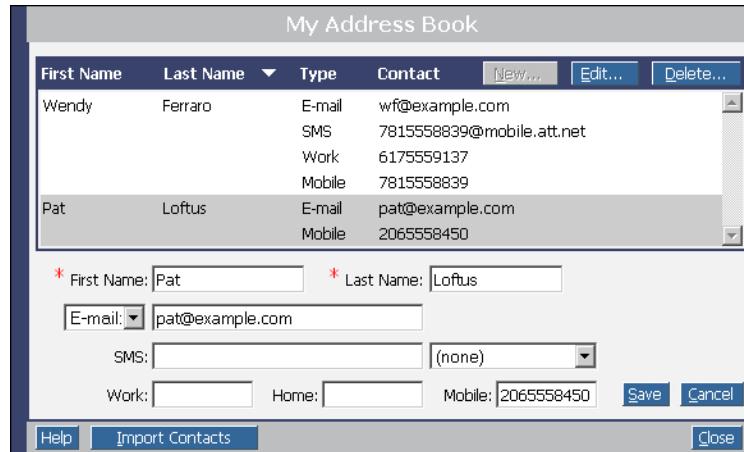
## Editing Contacts

You can edit a person's information in your personal address book at any time (your CoS must Allow Preferences Edit).

To edit an address book entry:

- Step 1.** From the **My Conferences** page, click **My Address Book**.
- Step 2.** Select the entry you want to edit by clicking on it and click **Edit**.

The entry is displayed in the fields at the bottom of the window.



- Step 3.** Make any changes and click **Save** to update the information or **Cancel** to close the editing fields without making a change.
- Step 4.** Click **Close** when you are finished with your address book.

## Deleting Contacts

To delete contacts from your address book:

- Step 1.** From the **My Conferences** page, click **My Address Book**.
- Step 2.** Select the entry you want to delete and click **Delete**.
- Step 3.** In the confirmation box, click **OK**.

Click **Close** when you are finished with your address book.



# Chapter 3: Scheduling Conferences

You can schedule conferences using the ConferenceManager web interface or through Microsoft Outlook. Scheduling reserves ports on the conferencing system and sends email invitations to your participants with instructions on joining the conference.

You can also start a conference immediately without having to schedule it, as described in "[Starting Ad-Hoc Conferences](#)" on page 54.

This chapter contains the following sections:

Scheduling Conferences with ConferenceManager .....	32
Scheduling Conferences with Outlook .....	39
About Conference Invitations .....	47
Pre-Setting a Web Conference Room .....	48
Modifying Scheduled Conferences .....	49
Canceling Scheduled Conferences .....	50

## A note about Classes of Service

Your ConferenceManager account is assigned to a Class of Service (or CoS) that determines the system features that you may access. Contact your administrator if you have any questions.

## Scheduling Conferences with ConferenceManager

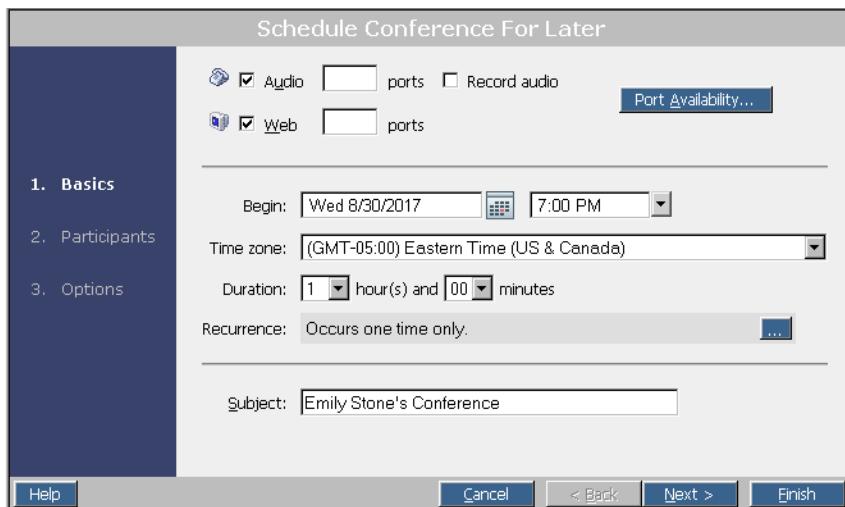
The Conference Later wizard allows you to schedule a conference in advance. The three pages allow you to specify basic conference details, invited participants, and conference options. After the conference is scheduled, each invitee receives an email invitation with the conference information and instructions for joining the conference.

Your CoS must Allow Reservations in order to schedule conferences.

To schedule a conference:

- Step 1.** From the My Conferences page, click **Conference Later**.

The Basics page of the Schedule Conference for Later window appears.



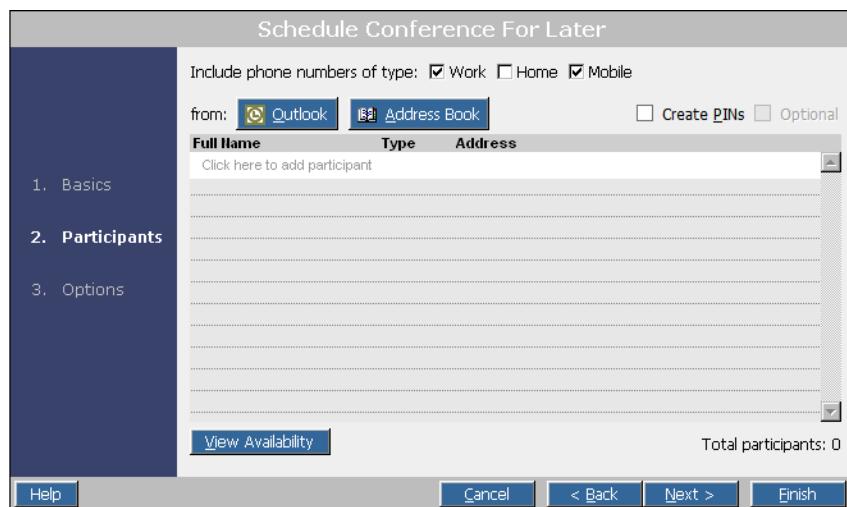
This window has three pages: **Basics**, **Participants**, and **Options**. Click **Next / Back** or click on the page names to move from page to page while entering conference information. Once you specify the number and type of audio/web ports to reserve, you can click **Finish** at any point to schedule the conference using your [default settings](#).

- Step 2.** Fill out the Basics page:

Item	Description
Audio	To reserve audio ports for the conference, select <b>Audio</b> and enter the number of ports to reserve.
Record Audio	Select <b>Record Audio</b> to record the audio portion of the conference for future download or playback. (Your conferencing system must be licensed for recording, and your CoS must also allow it.)
Web	To reserve web ports for the conference, select <b>Web</b> and enter the number of ports to reserve.
Port Availability	Click <b>Port Availability</b> to view the number of available audio and web ports by date and time. See " <a href="#">Checking Port Availability</a> " on page 38 for details.
Begin	Select a date and time at which to start the conference.

Item	Description
Time Zone	Select the time zone for which the Begin fields apply. This field defaults to the time zone specified in your account preferences.  If you specify a time zone for the conference other than the default (set in your account preferences), the <b>My Conferences</b> page displays a globe icon  next to the conference time; holding the mouse over the globe displays a tooltip with the applicable time zone.
Duration	Select the conference duration. You can schedule in 5-minute increments, with a 15-minute minimum.
Recurrence	Click <b>Recurrence</b> to configure a recurring conference, as described in " <a href="#">Scheduling Recurring Conferences</a> " on page 36
Subject	Enter a conference subject.  The subject identifies the conference in email invitations and wherever conference information is displayed; the default is <b>Host Name's Conference</b> .

**Step 3.** Click **Next** to view the Participants page.



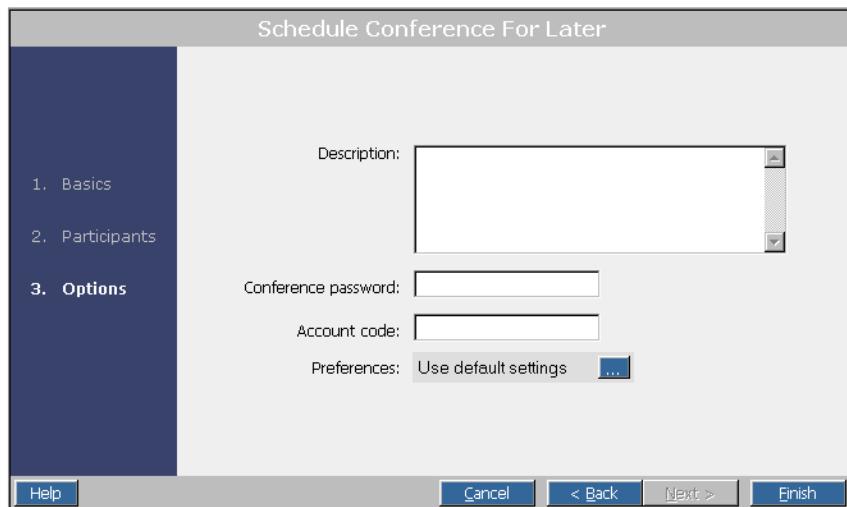
If you do not need to invite participants, click **Next** again to view the **Options** page, or click **Finish** to schedule the conference with the default options.

You have the following options for inviting participants:

Item	Description								
Include phone numbers of type from	<p>When you select contacts from one of the address books (Outlook, My Address Book, Global Address Book), the specified work/home/mobile phone types will automatically be added to the invite list. This option is not available if your CoS does not Allow Invite Phones.</p> <p>Once added, you may add one or both of the following suffixes to participant phone numbers:</p> <ul style="list-style-type: none"> <li>■ <b>J:</b> Join on Answer — for automatic dialouts, the participant is placed into the conference upon answering the call.</li> <li>■ <b>L:</b> Lecture Mode — the participant joins the meeting muted.</li> </ul>								
Outlook	<p>Click to add participants from the Outlook address book. See the Outlook Online Help for more information.</p> <p>Note that ConferenceManager and Outlook label the phone number fields differently:</p> <table border="1" data-bbox="349 699 1465 925"> <thead> <tr> <th data-bbox="349 699 910 741">ConferenceManager</th><th data-bbox="910 699 1465 741">Outlook</th></tr> </thead> <tbody> <tr> <td data-bbox="349 756 910 794">Work</td><td data-bbox="910 756 1465 794">Business</td></tr> <tr> <td data-bbox="349 808 910 846">Home</td><td data-bbox="910 808 1465 846">Home</td></tr> <tr> <td data-bbox="349 861 910 899">Mobile</td><td data-bbox="910 861 1465 899">Mobile</td></tr> </tbody> </table>	ConferenceManager	Outlook	Work	Business	Home	Home	Mobile	Mobile
ConferenceManager	Outlook								
Work	Business								
Home	Home								
Mobile	Mobile								
Address Book	<p>Click to add participants from either the global address book, or your own.</p> <p><b>Step 1.</b> Select an address book.</p> <p><b>Step 2.</b> Select one or more participants and click <b>Invite</b>.</p> <p><b>Step 3.</b> Click <b>OK</b>.</p> <p>See "<a href="#">Using Your Address Book</a>" on page 25 for more information.</p>								
[manual entry]	<p><b>Step 1.</b> Click <b>Click here...</b> to open a text field.</p> <p><b>Step 2.</b> Enter the <b>Full Name</b>, select <b>Email</b> or <b>SMS</b>, and enter the <b>Address</b>.</p> <p><b>Step 3.</b> If you select <b>SMS</b>, you can select a SMS suffix or enter your own.</p> <p><b>Step 4.</b> Click <input checked="" type="checkbox"/> (or press the Enter or Tab key) to add the name, or click <input type="button" value="X"/> to cancel it.</p> <p><b>Step 5.</b> Press <b>Enter</b>.</p> <p>To delete a participant, click the <input type="button" value="X"/> before their name.</p>								
Create PINs	<p>PINs add more security, and they allow the system to recognize participants as they enter the conference. Select this option to generate a unique PIN for each conference participant.</p> <p>If your administrator allows Persistent Participant PINs, participants are assigned the same PIN for every conference for which this option is enabled. Administrators also have the option of preventing hosts from viewing their invitees' PINs (encrypted PINs cannot be viewed in either case).</p>								
Optional	<p>If <b>Create PINs</b> is selected, selecting <b>Optional</b> allows participants to enter the conference without using their PIN.</p>								
View Availability	Click to check attendee availability using the Outlook calendar.								

**Note:** When you click **Outlook** (or try to use other Outlook functions such as View Availability) for the first time you may be prompted to install the browser plug-in.

- Step 4.** Click **Next** to view the Options page or, if you do not need to set any options, click **Finish**.



To specify the description, conference password, account code or preferences:

Item	Description
Description	Enter a conference description to include in email invitations.
Conference Password	To require a password for conference entry, enter a 4-8 digit number.
Account Code	To assign an account code to the conference, enter 2-15 digits.  Administrators can export conference records by account code, which can be used to track conferencing usage to cost centers for billing or other purposes.  This option is not available if your CoS does not Allow Account Codes; conversely, a code is required if your CoS is set to Require Account Codes.
Preferences	Click <b>...</b> to override your <b>default preferences</b> for this conference only; make changes as necessary (default values are in <b>bold</b> ) and click <b>OK</b> . Host preferences are described in "Host Preferences" on page 22.

- Step 5.** Click **Finish** to schedule the conference.

You may also click **Back** to edit a previous page.

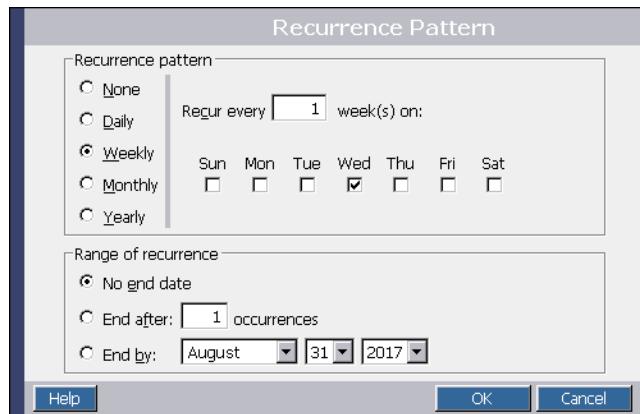
## Scheduling Recurring Conferences

You can schedule a series of regularly recurring conferences, all with the same dial-in number, Conference ID, PINs, and other details.

To set the recurrence pattern:

- Step 1.** From the **Basics** (first) page of the Conference Later wizard, click **Recurrence**.

The Recurrence Pattern window appears.



**Step 2.** Specify a **Recurrence Pattern** frequency and **Range of Recurrence**:

Item	Description
<b>Recurrence Pattern</b>	
None	The conference occurs only once.
Daily	Select a daily interval (specify <b>Every n Days</b> ), or select <b>Every Weekday</b> . (Note that scheduling a 24 hour conference with Daily recurrence effectively creates a continuous meeting that is always open.)
Weekly	Specify a weekly interval ( <b>Recur Every n Weeks</b> ) and select the days of the week.
Monthly	<ul style="list-style-type: none"> <li>■ Select a day of the month and specify the monthly interval, or</li> <li>■ Select a week of the month and day of the week, and specify the monthly interval.</li> </ul>
Yearly	<ul style="list-style-type: none"> <li>■ Select a day of the year, or</li> <li>■ Select a week of the month, day of the week, and the month.</li> </ul>
<b>Range of Recurrence</b>	
No End Date	Schedule conferences indefinitely.
End After n Occurrences	Schedule a set number of conferences.
End By	Stop scheduling conferences after a particular date.
<b>Recurrence Pattern</b>	
None	The conference occurs only once.
Daily	Select a daily interval (specify <b>Every n Days</b> ), or select <b>Every Weekday</b> .
Weekly	Specify a weekly interval ( <b>Recur Every n Weeks</b> ) and select the days of the week.
Monthly	<ul style="list-style-type: none"> <li>■ Select a day of the month and specify the monthly interval, or</li> <li>■ Select a week of the month and day of the week, and specify the monthly interval.</li> </ul>
Yearly	<ul style="list-style-type: none"> <li>■ Select a day of the year, or</li> <li>■ Select a week of the month, day of the week, and the month.</li> </ul>
<b>Range of Recurrence</b>	
No End Date	Schedule conferences indefinitely.
End After n Occurrences	Schedule a set number of conferences.
End By	Stop scheduling conferences after a particular date.

**Step 3.** Click **OK**.

The Recurrence field displays the specified pattern.

## Checking Port Availability

Ports are audio or web connections to the conferencing system; your conferencing system is licensed to support a set number of audio (phone line) and web (conference room connection) ports. On heavily used systems, checking Port Availability can help you find a given date and time when there are enough ports for your conference.

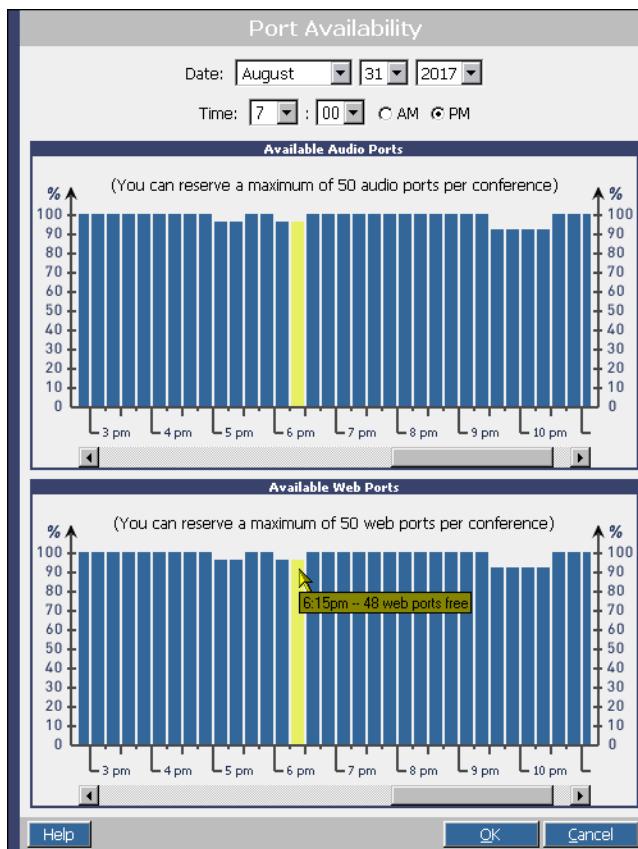
The scheduling wizards automatically reserve ports when a conference is scheduled. In the unlikely event that others have reserved the necessary ports by the time you finish scheduling the conference, the system prompts you to change the time.

One audio and one web port are always reserved for the host (so you can always join your conference). Once a conference begins, the conferencing system automatically reserves additional ports, if available, to support additional participants or long-running conferences.

To check port availability:

- Step 1.** From the **Basics** (first) page of the [Conference Later wizard](#), click **Port Availability**.

The Port Availability window indicates whether there are enough ports (audio, web, or both, depending on your system and the specifics of the conference you're scheduling) available for the selected date and time.



- Step 2.** To change the start time, click on another bar or use the fields or select the time from the **Time** fields.

- Step 3.** Click **OK** to return to the Basics page and save any changes; click **Cancel** to return without making changes.

## Scheduling Conferences with Outlook

If you use Microsoft Outlook, you can install an add-in that allows you to schedule conferences directly through Outlook (see "[Installing Optional Components](#)" on page 7). You can access your Outlook address book, invite participants (and check participant availability), and book recurring conferences just as you would with any other meeting. Your CoS must Enable Outlook Features. Also, you can use Outlook's Delegates feature to allow someone to schedule conferences on your behalf (see "[Allowing a Delegate to Schedule Conferences](#)" on page 43).

If you use Outlook to schedule conferences, try to do so consistently — while scheduling activities in Outlook are synchronized to ConferenceManager, any scheduling you do in ConferenceManager is not synchronized back to Outlook. For example, conferences scheduled in Outlook but canceled from ConferenceManager will not be removed from the Outlook calendar.

If you are required to change your ConferenceManager PIN, you may be prompted to do so via Outlook when scheduling a conference. See "[Changing Your PIN Upon Login](#)" on page 3 for a list of situations where this can occur.

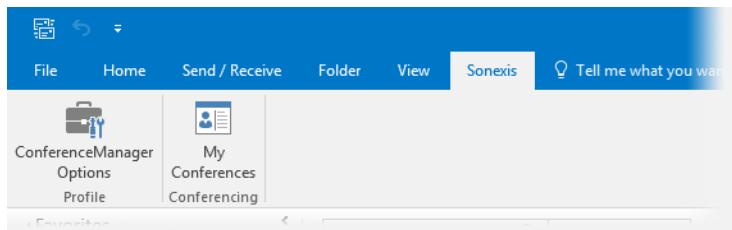
### Configuring Outlook Options

Outlook can store your ConferenceManager identity and conferencing system URL so you can schedule conferences without authenticating. If you change any of this information in ConferenceManager, you must make the same changes in Outlook.

**Note:** The Outlook add-in requires Visual Studio 2010 Tools for Office Runtime and .Net framework 4.0 or higher, which your administrator may need to install.

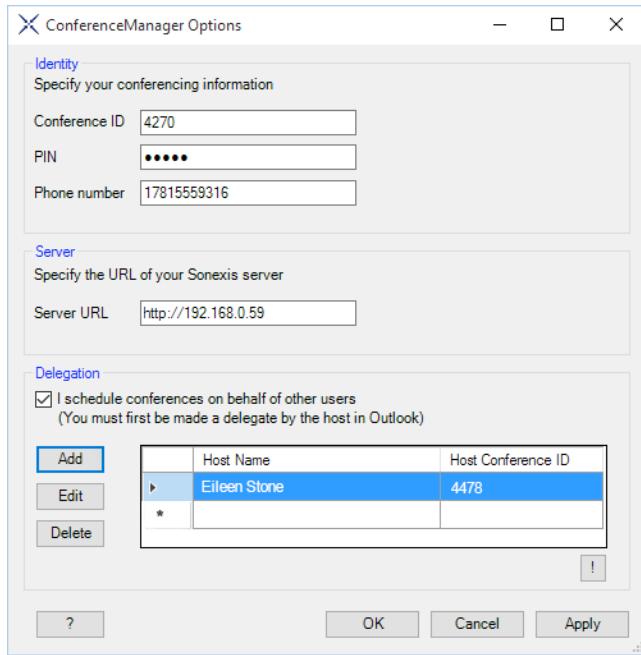
To edit Outlook options:

- Step 1. In Outlook, click the Sonexis tab on the ribbon.



**Step 2.** Click ConferenceManager Options.

The ConferenceManager Options window appears.



**Step 3.** Enter your **Conference ID** and **PIN**.

Entering your Phone number is optional.

**Step 4.** Enter the Server URL of your ConferenceManager server.

The URL may already be present if your administrator installed the Outlook Add-In on your PC.

**Step 5.** If you wish to use delegates for scheduling, you can manage them here; see "[Allowing a Delegate to Schedule Conferences](#)" on page 43 for instructions.

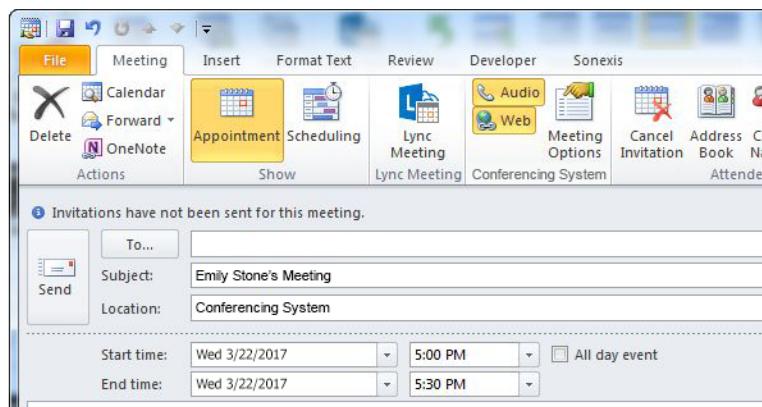
**Step 6.** Click **OK** or **Apply** to save your changes.

## Scheduling Your Own Conference Using Outlook

To schedule a conference through Outlook:

- Step 1. Create a new Meeting in Outlook as you normally would.

A new meeting form appears.



If you do not see a **ConferenceManager** section on the ribbon, see "[Installing Optional Components](#)" on [page 7](#).

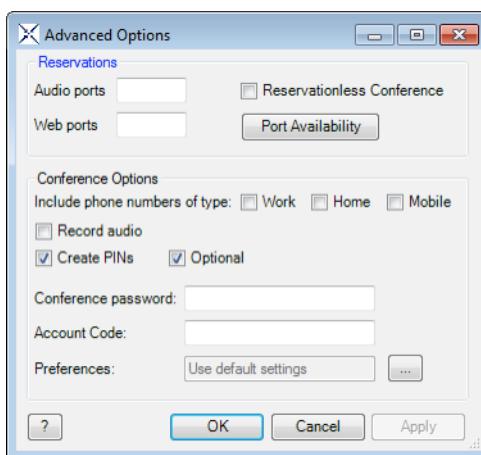
- Step 2. Complete the **Appointment** and **Scheduling** tabs and invite participants as you normally would.

By default, ConferenceManager will reserve enough ports for you and your invitees.

- Step 3. In the **ConferenceManager** section of the ribbon, click to select the **Audio** and/or **Web** buttons as appropriate; in some cases your administrator may opt to provide a single button for both.

- Step 4. To modify your [default conference preferences](#) for this meeting, click **Meeting Options** button (otherwise, just click **Send**).

The Advanced Options window displays the ConferenceManager-specific fields.



**Step 5.** Make changes as necessary.

Item	Description
Reservations	If enabled, you can enter values to reserve that number of ports, regardless of the number of invitees. You can also leave the fields blank to reserve a port for each invitee, plus one for the host. (Both of these cases assume there is no CoS restriction on reserving ports, and that there enough ports available to reserve.)  If your CoS allows it, you may select <b>Reservationless Conference</b> to schedule the conference without reserving ports.
Include phone numbers of type	When you select contacts from Outlook, the specified work/home/mobile phone types will automatically be added to the invite list.  This option is not available if your CoS does not Allow Invite Phones.
Record Audio	Select <b>Record Audio</b> to record the audio portion of the conference for future download or playback. (Your conferencing system must be licensed for recording, and your CoS must also allow it.)
Create PINs	PINs add more security, and they allow the system to recognize participants as they enter the conference. Select this option to generate a unique PIN for each conference participant.  If your administrator allows Persistent Participant PINs, participants are assigned the same PIN for every conference for which this option is enabled. Administrators also have the option of preventing hosts from viewing their invitees' PINs (encrypted PINs cannot be viewed in either case).
Optional	If <b>Create PINs</b> is selected, selecting <b>Optional</b> allows participants to enter the conference without using their PIN.
Conference Password	To require a password for conference entry, enter a 4-8 digit number.
Account Code	To assign an account code to the conference, enter 2-15 digits.  Administrators can export conference records by account code, which can be used to track conferencing usage to cost centers for billing or other purposes.  This option is not available if your CoS does not Allow Account Codes; conversely, a code is required if your CoS is set to Require Account Codes.
Preferences	Click  to override your <b>default preferences</b> for this conference only; make changes as necessary (default values are in <b>bold</b> ) and click <b>OK</b> . Host preferences are described in "Host Preferences" on page 22.

**Step 6.** Click **Send**.

Participants receive a meeting request via email, for which they may select **Accept**, **Tentative**, or **Decline** as with any other meeting request.

Invitations also contain a *View* link to the Host or Participant login page, as appropriate.

## Allowing a Delegate to Schedule Conferences

ConferenceManager's Outlook integration allows you to assign delegates (an admin or meeting planner, for example) to schedule conferences on your behalf. Both you and your delegate must configure Outlook:

- Step 1. You (the host) assign a delegate from your Outlook account (see "Host: Assigning a Delegate" below).
- Step 2. The delegate configures your host information in their Outlook account (see "Delegate: Configuring Outlook" on page 45).
- Step 3. The delegate can then schedule a conference on your behalf by selecting a time slot on your Outlook calendar and scheduling a meeting as usual.

Note that Outlook delegation is independent from ConferenceManager's delegated accounts, described in Chapter 7, "Acting as a Delegate".

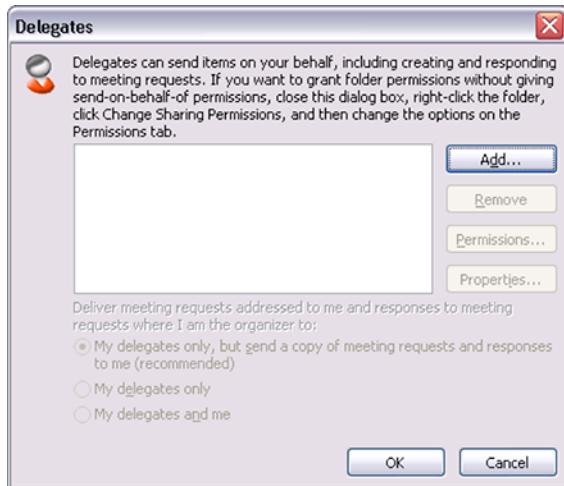
### **Host: Assigning a Delegate**

To configure a delegate in Outlook:

- Step 1. In Outlook, select **File > Info > Account Settings > Delegate Access**.



The Delegates window appears.

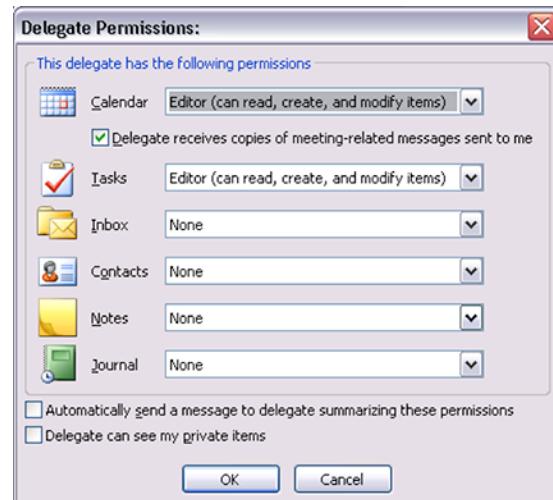


**Step 2.** Click **Add**.

The Add Users window appears, with the Outlook Address Book.

**Step 3.** Select a delegate and click **OK**.

The Delegate Permissions window appears.



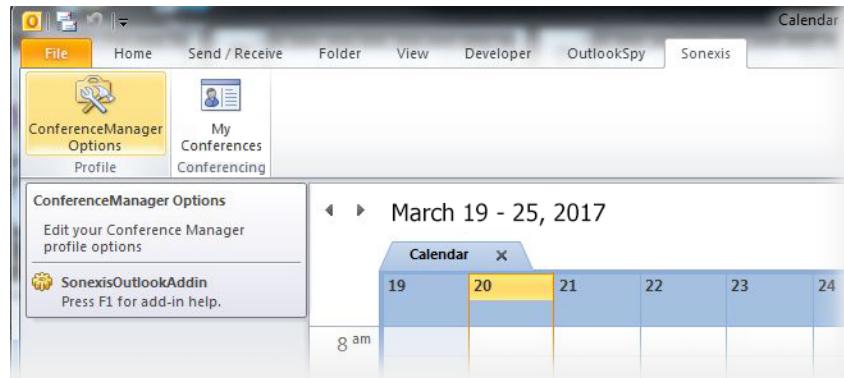
**Step 4.** Verify that the delegate's **Calendar** and **Tasks** permissions are set to **Editor**.

**Step 5.** Click **OK**, and click **OK** again to close the Options window.

### **Delegate: Configuring Outlook**

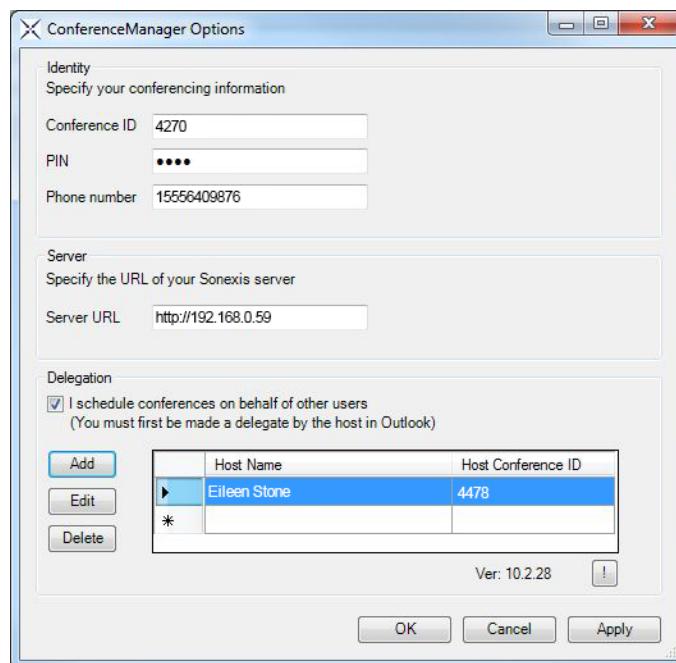
After a host has assigned a delegate in Outlook, that delegate must configure their Outlook account with the host's information.

- Step 1. In Outlook, click the **Sonexis** tab on the ribbon.



- Step 2. Click **ConferenceManager Options**.

The ConferenceManager Options window appears.



- Step 3. In the **Delegation** section, select **I schedule conferences on behalf of other users**.

**Step 4.** Click **Add**.

The Host and Conference Information window appears.



**Step 5.** Click **Select Name**.

**Step 6.** Select the host (who assigned the delegate) from the Outlook directory and click **OK**.

**Step 7.** Enter the host's **Host Conference ID** and **Host PIN**.

**Step 8.** Click **Save**.

**Step 9.** Click **OK**.

## About Conference Invitations

When a conference is scheduled or modified, ConferenceManager sends email invitations to the host and all invited participants. As the host, you receive an email copy of the invitation with a list of invited participants (and their PINs, if allowed/assigned). Invitations to phone numbers are sent via SMS.

ConferenceManager sends meeting requests in a calendar format that is recognized by Outlook (2003, 2007, 2010), Lotus Notes (7, 8, 8.5), Gmail, and Hotmail clients, allowing you to Accept or Decline the invitation directly from the message. The administrator may opt to include iCalendar attachments for compatibility with older mail clients, though that also disables the Accept/Decline buttons.

Conference invitations contain:

- Conference description and details
- A notice that the conference may be recorded, if recording is scheduled
- Instructions on joining the conference
- For conferences with a web component, a link to automatically log the participant into the conference  
Similarly, the host receives an email with a *View* link to the Host Login page.
- For conferences with an audio component (if the administrator allows dialouts), a link to log into the conference and perform a dialout
- Conference Password and PIN, if required

If your administrator allows Persistent Participant PINs, participants are assigned same PIN for every conference for which PINs are automatically assigned. Administrators also have the option of preventing hosts from viewing their invitees' PINs.

If "Required" appears in place of a PIN, the administrator is using PIN encryption, and you will need to enter your PIN to join the conference.

- A link to the [System Test page](#) to test PC compatibility

You can also [re]send conference invitations directly from the My Conferences page — select a conference (with invited attendees) that is scheduled or in progress and click **Send Update**.

## Pre-Setting a Web Conference Room

You can enter a conference room before the conference and set it up by adding documents, images, notes, polls, or whiteboard drawings.

If your preferences allow participants to join a conference before you arrive, you can use the conference room  [Preferences](#) to allow participants to add documents or annotations before the conference begins.

To set up a conference room:

**Step 1.** From the [My Conferences](#) page, select a conference from the **Conferencing** tab.

**Step 2.** Click **Set Up**.

The conference room launches.

**Step 3.** Set up the conference room as necessary.

[Chapter 6, "Leading a Web Conference"](#) describes how to use the conference room.

**Step 4.** Close the conference room window to save your changes.

## Modifying Scheduled Conferences

You can edit a scheduled conference at any point before it begins. You can modify conference details such as the date, time, reserved ports, or subject. You can also modify the participant list by adding new participants or deleting invited participants. (Your CoS must Allow Reservations.)

You can modify conferences from the web interface or from Outlook; the procedure is the same. However, while changes you make in Outlook are copied to ConferenceManager, changes you make in ConferenceManager are not copied back to Outlook.

To edit a scheduled conference:

- Step 1.** From the My Conferences page, select a conference from the **Conferencing** tab and click **Edit**.

To edit a conference from Outlook, double-click on the conference in the Outlook calendar. If you are just changing the conference time, you can simply drag the meeting to a new spot on the Outlook calendar.

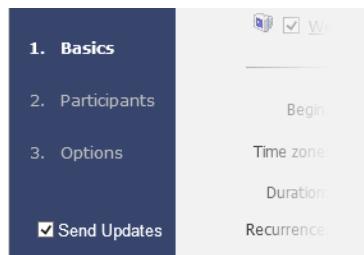
- Step 2.** If this is a recurring conference, specify whether you are editing one conference or the entire series.

- Step 3.** The first page of the **Conference Later** wizard appears.

- Step 4.** Edit any of the three pages as necessary.

See "[Scheduling Conferences with ConferenceManager](#)" on page [32](#) for field descriptions.

- Step 5.** (Web interface only) If you do not wish to send invitation updates to conference participants, uncheck **Send Updates**.



- Step 6.** Click **Finish**.

The conferencing system confirms that your conference has been modified and updated email invitations are sent to participants if necessary.

## Canceling Scheduled Conferences

You can cancel a scheduled conference at any time until the scheduled start time (your CoS must Allow Reservations).

You can cancel the conference from either ConferenceManager or Outlook, though note that canceling an Outlook-scheduled conference in ConferenceManager does not remove the conference from the Outlook calendar.

### Canceling a Conference through ConferenceManager

The My Conferences page lists all of your scheduled conferences and allows you to select the one to cancel. You can cancel any type of scheduled conference via the web, whether scheduled via the web or Outlook.

To cancel a scheduled conference via the web:

**Step 1.** From the **My Conferences** page, select a conference from the **Conferencing** tab.

**Step 2.** Click **Cancel**.

A confirmation window appears.

If this is a recurring conference, you are first asked to specify if you are deleting one occurrence or the entire series.

**Step 3.** Click **OK** to cancel the conference(s).

The system sends a cancellation email to all invitees, removes the conference from the scheduled conferences list and from invitees' calendars, and frees any reserved ports.

### Canceling a Conference through Outlook

You can cancel a conference scheduled in Outlook and choose whether you want to notify invitees of the cancellation.

To cancel a scheduled conference via Outlook:

**Step 1.** In your Outlook Calendar, select the conference you want to cancel and press **Delete**.

**Step 2.** If this is a recurring conference, specify whether you are deleting one conference or the entire series.

**Step 3.** Click  or select **File > Delete**.

A pop-up presents the option to send cancellation notices.

# Chapter 4: Starting and Ending Conferences

There are two basic types of ConferenceManager conferences that you can conduct: ad-hoc conferences and scheduled conferences. A third type, Preset conference, is a licensed feature (see ["Starting Preset Conferences" on page 59](#))

Ad-hoc conferences reserve ports immediately and start right away. Scheduled conferences include advance reservation of ports and advance email invitations to participants.

See ["Scheduling Conferences" on page 31](#) for instructions on scheduling future conferences.

This chapter contains the following sections:

Starting Scheduled Conferences .....	52
Starting Ad-Hoc Conferences .....	54
Starting Preset Conferences .....	59
Editing Conferences in Progress .....	60
Ending or Leaving Conferences .....	61
Rejoining a Conference in Progress .....	64

## A note about Classes of Service

Your ConferenceManager account is assigned to a Class of Service (or CoS) that determines the system features that you may access. Contact your administrator if you have any questions.

## Starting Scheduled Conferences

As the host you can start a previously scheduled conference in three ways: Dialing in [by phone](#), through the ConferenceManager [web interface](#), or by [automatic dialout](#).

### Starting a Conference by Phone

You can dial in to the conferencing system by phone to start an audio-only or audio+web conference (though starting an audio+web conference by phone does not launch the audio console or conference room on your PC). Participants dialing into the conference before you are placed on hold until you enter the conference, unless your preferences allow the conference to begin without you.

To start the conference:

- Step 1.** Dial in to the conferencing system at the scheduled time.

You cannot begin a scheduled conference more than 15 minutes prior to its scheduled start time. If you dial in before then, or if no conference is scheduled, the system still prompts you to start an ad-hoc audio conference (in the same manner as "[Starting an Ad-Hoc Audio Conference by Phone](#)" on page 54).

- Step 2.** Enter your Conference ID and press #.

If you dial in from the phone number (and your phone system passes ANI through) listed in your **My Account** page, the system recognizes you and allows you to begin the conference without entering your Conference ID.

- Step 3.** Press 1 to identify yourself as the host.

- Step 4.** Enter your PIN and press #.

If you are required to change your ConferenceManager PIN, the audio prompts will explain why and lead you through the process. See "[Changing Your PIN Upon Login](#)" on page 3 for a list of situations where this can occur.

- Step 5.** Enter a Conference Password if prompted and press #.

The phone commands are described in "[Controlling a Conference by Phone](#)" on page 66.

### Starting a Conference by Web

You can start a previously scheduled conference (whether audio or web) from the My Conferences page. You cannot start a scheduled conference more than 15 minutes prior to its scheduled start time or after its scheduled end time.

- Step 1.** From your **My Conferences** page select a conference from the **Conferencing** tab.

- Step 2.** Click **Start**.

The audio console and conference room launch automatically, as appropriate for the conference type.

**Notes:**

- If your conference includes an audio portion that you have not already started by phone, you can either dial in by phone or have the system dial out to you if you have dial-out permission.
- Any participants dialing into the conference before you are placed on hold until the you enter the conference, unless your preferences allow the conference to begin without you. In that case, audio participants are able to speak to each other, and web participants may use Chat.
- Conference attendees can join a conference 15 minutes before the scheduled start time (if ports are available). Your conference preferences determine whether the conference can begin without you (see "[Setting Your Host Preferences](#)" on page 19).
- If you see a security warning when you first access the conference room, click **Yes** to run the installer.

## Starting a Conference by Automatic Dialout

If your CoS is set to Allow Dial Out, your host or conference preferences can initiate a scheduled conference automatically by dialing out to you when the first participant joins, or before/at the scheduled start time.

See "[Setting Your Host Preferences](#)" on page 19, or "[Scheduling Conferences with ConferenceManager](#)" on page 32 for descriptions of Host Dialout options. Also note that automatic dialout uses the phone number configured in your account settings as described in "[Editing Your Account Information](#)" on page 17.

## Starting Ad-Hoc Conferences

ConferenceManager allows you to create quick ad-hoc conferences without first scheduling them. Provided that ports are available (and that your CoS Allows Adhoc conferences), the conferencing system reserves two ports (audio, web, or both, as appropriate) for 15 minutes and starts the conference.

The system extends the conference in 15-minute increments as long as ports are still available; additional participants can also join the conference if ports are available. When the ports are needed for a scheduled conference, you receive five-minute and one-minute warnings before the system ends the conference.

### Starting an Ad-Hoc Audio Conference by Phone

ConferenceManager allows you to start an ad-hoc audio conference by phone, without first logging in through the web interface. You cannot set passwords or individual PINs when starting an ad-hoc conference by phone.

To start an ad-hoc conference by phone:

- Step 1. Dial in to the conferencing system.
- Step 2. Enter your Conference ID and press #.
- Step 3. Press 1 to identify yourself as the host.
- Step 4. Enter your PIN and press #.

If you are required to change your ConferenceManager PIN, the audio prompts will explain why and lead you through the process. See "["Changing Your PIN Upon Login" on page 3](#)" for a list of situations where this can occur.

- Step 5. Press 1 to start a new conference.
- Step 6. Enter a Conference Password if prompted and press #.

Alternately, if you are calling into a conferencing system configured for DID (Direct Inward Dial), you may be prompted to start a conference without entering your Conference ID.

You can also launch the audio console to control the conference:

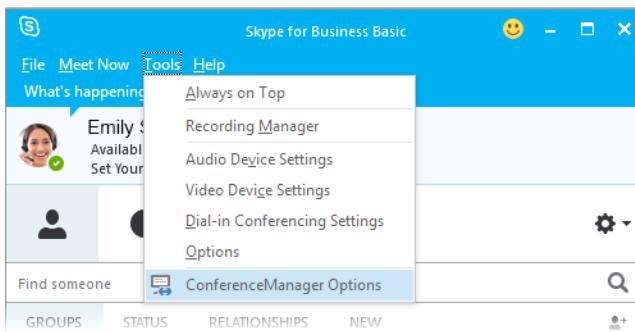
- Step 1. Log in to ConferenceManager as a conference host.
- Step 2. From the **My Conferences** page, select the conference from the **Conferencing** tab.
- Step 3. Click **Enter**.

The audio console appears; see "["About the Audio Console" on page 69](#)" for more information.

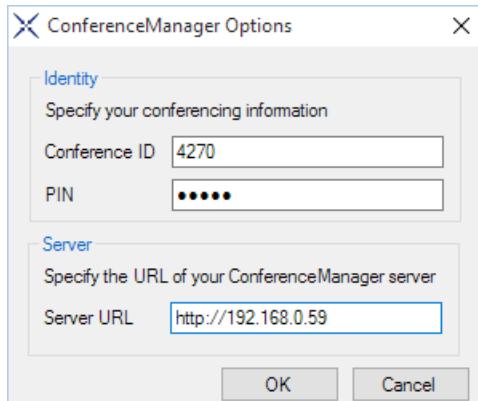
Once the conference is started, if you have dial-out privileges, you can add participants to the audio conference by dialing out to them; see "["Dialing Out from the Audio Console" on page 72](#)" or "["Controlling a Conference by Phone" on page 66](#)".

## Starting an Ad-Hoc Audio Conference via Skype

If you use Microsoft Skype for Business, you can install an add-in that allows you to start conferences directly through Skype (see "[Installing Optional Components](#)" on page 7).

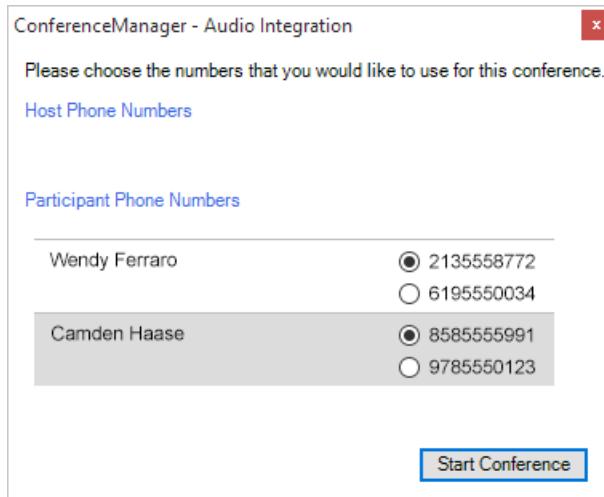


Once installed, start Skype and select **Tools > ConferenceManager Options** to configure the integration. In the ConferenceManager Options pop-up, enter your Conference ID, PIN, and Server URL and then click **OK**.



To start a conference, select one or more contacts in Skype, right-click, and select **ConferenceManager Conference**; you can also select that option from the ellipsis (...) button in a chat window.

In the Audio Integration pop-up that appears, select phone numbers for each contact and click **Start Conference**.



## Starting an Ad-Hoc Conference by Web

After logging in to ConferenceManager, the Conference Now wizard allows you to start ad-hoc audio and web conferences.

You can configure conference participants and set conference options if necessary, or you can start the conference right away with the default settings. For more detailed information and scheduling procedures, see "["Scheduling Conferences with ConferenceManager" on page 32](#)".

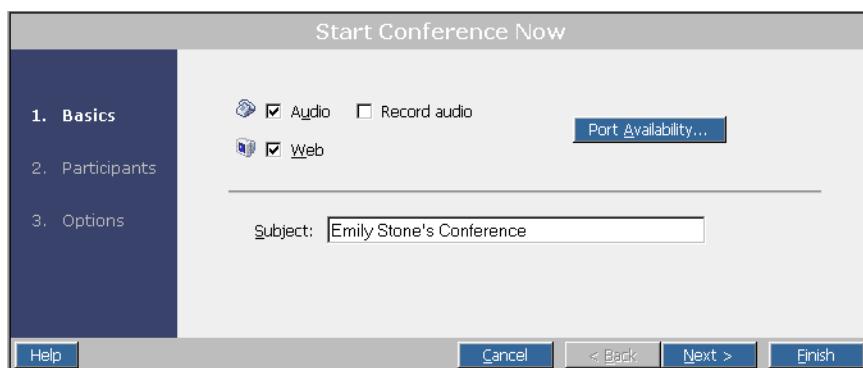
To start an ad-hoc conference immediately, using the default options/preferences:

- From the **My Conferences** page, click **Conference Now**.

To start an ad-hoc conference after specifying conference options:

- Step 1.** From the **My Conferences** page, click the arrow on the right side of the **Conference Now** button and select **Options**.

The Start Conference Now window appears.



You can click **Finish** at any point in this procedure to begin the conference immediately with the currently specified options.

**Step 2.** Fill out the Basics page:

Item	Description
Audio	To reserve audio ports for the conference, select <b>Audio</b> and enter the number of ports to reserve.
Record Audio	Select <b>Record Audio</b> to record the audio portion of the conference for future download or playback. (Your conferencing system must be licensed for recording, and your CoS must also allow it.)
Web	To reserve web ports for the conference, select <b>Web</b> and enter the number of ports to reserve.
Port Availability	Click <b>Port Availability</b> to view the number of available audio and web ports by date and time. See " <a href="#">Checking Port Availability</a> " on page 38 for details.
Subject	Enter a conference subject. The subject identifies the conference in email invitations and wherever conference information is displayed; the default is <b>Host Name's Conference</b> .

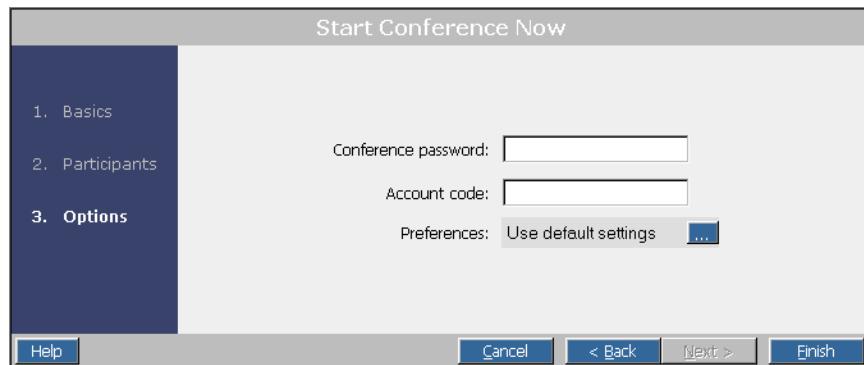
**Step 3.** Click **Next** to display the **Participants** page.

The screenshot shows the 'Start Conference Now' dialog box. On the left, a vertical menu lists '1. Basics', '2. Participants' (which is highlighted in blue), and '3. Options'. The main area is titled 'Start Conference Now' and contains the following elements:

- Checkboxes for selecting phone numbers:  Work,  Home,  Mobile.
- A 'from:' section with buttons for 'Outlook' (selected) and 'Address Book'.
- Checkboxes for 'Create PINs' and 'Optional'.
- A table header with columns 'Full Name', 'Type', and 'Address'.
- A text input field with placeholder text 'Click here to add participant'.
- A 'View Availability' button.
- A 'Total participants: 0' counter.
- Buttons at the bottom: 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

You can retrieve names from **Outlook** or the conferencing system **Address Book**, or click to enter participants manually. See "[Scheduling Conferences with ConferenceManager](#)" on page 32 for instructions.

**Step 4.** Click **Next** to display the **Options** page.



Set conference options as necessary.

Item	Description
Conference Password	To require a password for conference entry, enter a 4-8 digit number.
Account Code	To assign an account code to the conference, enter 2-15 digits. Administrators can export conference records by account code, which can be used to track conferencing usage to cost centers for billing or other purposes. This option is not available if your CoS does not Allow Account Codes; conversely, a code is required if your CoS is set to Require Account Codes.
Preferences	Click <b>[...]</b> to override your <b>default preferences</b> for this conference only; make changes as necessary (default values are in <b>bold</b> ) and click <b>OK</b> . Host preferences are described in " <a href="#">Host Preferences</a> " on page 22.

**Step 5.** Click **Finish** to begin the conference.

## Starting Preset Conferences

A *Preset Conference* is designed to enable fast connections to a predefined group of participants. If a host dials into a conferencing system that is licensed for Multilevel Precedence and Preemption (MLPP) and belongs to a CoS that has Preset Conferencing enabled, a preset conference can be initiated in one of two ways:

- The host dials into the conferencing system on a preconfigured DID extension
- The host calls into the conferencing system and enters an appropriate Conference ID

An ad-hoc conference is then immediately started (without the need to enter a PIN). Preset Conferencing accounts are normally set up to Blast Dial to My Address Book when the first person joins the conference. The host, or *originator*, can also initiate additional dialouts either manually or via Blast Dial; it is not possible to dial in once the conference is initiated.

A Preset Conference cannot normally be started from a phone number listed in the account's My Address Book. Participants contacted via Blast outdial are normally brought into the conference immediately when the call is answered; individual dialouts still create the usual private conference session with the host/originator. Your administrator can modify these behaviors.

In an MLPP network, if the conferencing system does not have enough licensed ports to create a connection (either for the initiating host, or to a dialed-out participant), then calls of lower precedence will be preempted so the port can be used for the preset conference. Contact your administrator for more information.

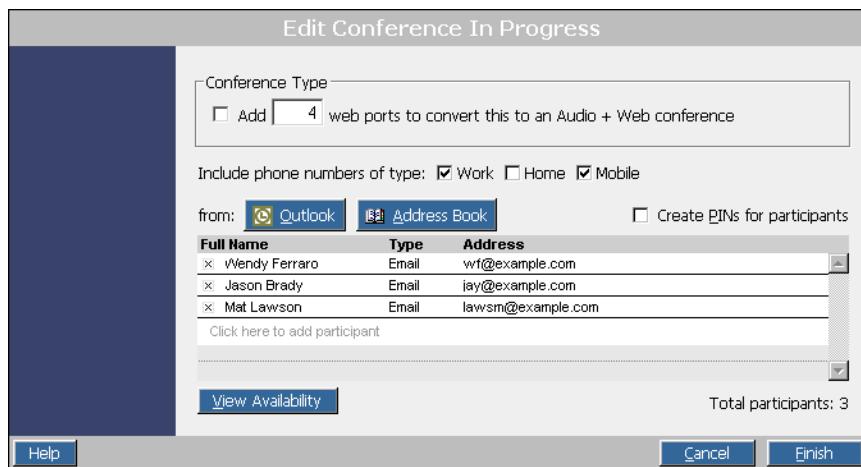
## Editing Conferences in Progress

You can change the conference type and add new participants even after a conference has started (your CoS must Allow Reservations/Allow Adhoc to edit a scheduled/adhoc conference). Any changes are reflected in new invitations sent to you and any new participants.

To modify a conference in progress via the web:

- Step 1.** Select one of the following options, depending on the window you're looking at:
  - From the Conference Room, click  **Quick Invite**.
  - From the Audio Console, click **Quick Invite**.
  - From the **My Conferences** page, select a conference from the **Conferencing** tab, and then click **Edit**.
- Step 2.** Click **Edit**.

The Edit Conference in Progress page appears.



Full Name	Type	Address
Wendy Ferraro	Email	wf@example.com
Jason Brady	Email	jay@example.com
Mat Lawson	Email	lawsm@example.com

Note that the Conference Type section does not appear if you are editing an Audio+Web conference.

- Step 3.** If the conference is audio-only or web-only, you may change the **Conference Type**.

You may add web ports to audio-only conferences, or audio ports to web-only conferences. Select the box in the **Conference Type** section and enter the number of ports to add.

- Step 4.** Modify the participants list if necessary.

Additional audio or web ports are automatically added to accommodate new participants.

- Step 5.** Click **Finish**.

## Ending or Leaving Conferences

As the host you can manually end a conference at any time and disconnect all participants, or just leave the conference and allow participants to continue on without you for some period of time. You can specify the continuation time as you leave the conference, or allow your conference preferences to determine when the conference will end.

The most direct way to end (or leave) a conference is to simply hang up the phone and close your conference room window (either or both, as appropriate) and letting your preferences determine what happens. See "[Setting Your Host Preferences](#)" on page 19 for more information.

### Ending or Leaving by Phone

While in a conference (either audio or audio+web) you can end the conference using the phone commands.

#### ***Ending a Conference***

Ending a conference by phone immediately disconnects you and all participants from the audio and web (if appropriate) portions of the conference.

To end a conference by phone:

- Step 1. Press **\*8**.
- Step 2. Press **1** to confirm that you want to end the conference.
- Step 3. Hang up.

#### ***Leaving a Conference***

Instead of ending a conference, you can leave the conference while allowing it to continue. Leaving a conference by phone does not remove you from the web portion of an audio+web conference.

To let your conference preferences determine how long the conference continues without you, just hang up the phone. To leave the conference and override your preferences:

- Step 1. Press **\*7**.
- Step 2. When prompted, select the length of time you would like the conference to continue after you disconnect:

Press	To continue for...
<b>1</b>	15 minutes
<b>2</b>	30 minutes
<b>3</b>	45 minutes
<b>4</b>	60 minutes
<b>5</b>	To disconnect all participants at the scheduled end time
<b>6</b>	To continue the conference as long as there are ports available

- Step 3. Hang up.

## Ending or Leaving a Conference from the Conference Room

You can end or leave any type of conference using the web.

To end a conference:

- Step 1.** From the conference room or audio console, click **End Conference**.

The End Conference window appears.



- Step 2.** Specify when the conference should end:

- To immediately end the conference, select **End conference & disconnect all participants**.
- To let the conference continue after you exit, select **Disconnect me from the conference**.

- Step 3.** Override your conference preferences if necessary:

Preference	Options
When I'm not present in the conference (available for the <i>Disconnect me...</i> option only)	<ul style="list-style-type: none"> <li>■ End the conference after [15, 30, 45, 60, 90, 120, 180] minutes</li> <li>■ End the conference at the scheduled time</li> <li>■ Continue the conference for as long as ports are available</li> </ul>
When the conference ends	<ul style="list-style-type: none"> <li>■ Save the conference room (not available for audio conferences)</li> <li>■ Delete the conference room</li> </ul>

- Step 4.** Click **OK**.

You can also disconnect from the audio portion of a conference via the audio console and let your conference preferences determine how long the conference continues — click **Disconnect** next to your name and then click **OK** in the confirmation box.

## Ending a Conference from the My Conferences Page

You can end conferences directly from the My Conferences page, regardless of whether you are currently in the conference. While you are asked to confirm your action, you are not given the choice to save the conference room.

To end a conference from the My Conferences page:

- Step 1.** From the **My Conferences** page, select a conference from the **Conferencing** tab.

A red  icon appears next to conferences with no remaining participants. Unless participants will be rejoining a conference, you should end such conferences when possible to release its ports.

- Step 2.** Click **End**.

The End Conference in Progress confirmation appears.

- Step 3.** Click **OK**.

All participants are immediately disconnected from the conference; your conference preferences determine whether the conference room is saved.

## Rejoining a Conference in Progress

If you left a conference, you can rejoin the conference if it has not yet ended.

If you left the audio portion of a conference, do one of the following:

- Redial the conference dial-in number and enter your Conference ID and PIN.
- From the My Conferences page, select a conference from the **Conferencing** tab, click **Enter**, and use the **Dial Out** controls to call yourself.
- If you are still connected to the web portion of an audio+web conference, click **View Audio Console** and use the **Dial Out** controls to call yourself.

If you left the web portion of a conference, do one of the following:

- From the My Conferences page, select a conference from the **Conferencing** tab and click **Enter**.
- If you are still connected to the audio portion of an audio+web conference, click **View Conference Room** from the audio console toolbar and click **Enter**.

# Chapter 5: Leading an Audio Conference

You can host audio conferences either by phone or by using the ConferenceManager audio console through your web browser (with which you also control the audio portion of an audio+web conference).

Controlling the conference by phone provides access to the key functions such as dialing out to new participants, muting participants, starting and stopping conference recording, and ending the conference. The audio console supports additional features such as private conferencing and the “who’s talking” indicator.

The telephone and audio console can also control Blast Dial, which allows ConferenceManager to automatically dial a list of phone numbers and bring participants into an audio conference (bypassing the usual private conference before the participant is brought into the conference room). Blast Dial is a separately licensed feature that your administrator must enable.

This chapter contains the following sections:

Controlling a Conference by Phone .....	66
About the Audio Console .....	69
Managing an Audio Conference from the Console .....	71
Dialing Out from the Audio Console .....	72
Managing Participants .....	77
Sending a Quick Invitation .....	79
Conferencing in Private .....	80
Recording Conference Audio .....	81

## A note about Classes of Service

Your ConferenceManager account is assigned to a Class of Service (or CoS) that determines the system features that you may access. Contact your administrator if you have any questions.

## Controlling a Conference by Phone

If you do not have access to a computer, you can lead an audio conference by phone.

After dialing in to the conferencing system and identifying yourself (see "Starting a Conference by Phone" on page 52), you can use the following set of phone commands by pressing the \* key and then a number:

Command	Description
*0	Describes the phone commands. Return to the conference with ##.
*00	If allowed by your administrator, dial *00 to request customer assistance.
*1	<ul style="list-style-type: none"> <li>■ <i>If Blast Dial is unlicensed or not enabled</i> <p>Dials out to a new participant. After dialing out connecting with a new participant, you have three options:</p> <ul style="list-style-type: none"> <li>■ ** Rejoin the conference with the new participant</li> <li>■ ## Disconnect the new participant and rejoin the conference</li> <li>■ *1 Disconnect the new participant and dial another number</li> </ul> </li> <li>■ <i>If Blast Dial is licensed and enabled</i> <p>Blast Dials to one or more participants. You have five options:</p> <ul style="list-style-type: none"> <li>■ 1 Dial out to a single participant and bring them directly into the conference (bypassing the private conference)</li> <li>■ 2 Blast Dial to the invitee list</li> <li>■ 3 Blast Dial to My Address Book</li> <li>■ 4 Cancel pending dialouts</li> <li>■ 5 Hear Blast Dial status</li> </ul> </li> </ul>
*2	Mutes or unmutes your line.
*3	Mutes or unmutes all lines except your own (lecture mode). You can have conferences start in lecture mode automatically, as described in "Setting Your Host Preferences" on page 19.
*4	<p>Reads a roll call. You have two options:</p> <ul style="list-style-type: none"> <li>■ 1 Hear the number of participants</li> <li>■ 2 Hear a list of names (if participants recorded them upon entering)</li> </ul> <p>If the host has not joined the conference, a participant may become the host by pressing *4 and then entering the host's PIN.</p>
*5	Locks or unlocks the conference. New participants cannot join a locked conference.
*6	Records a conference greeting for new participants (and system branding greetings, if allowed).

Command	Description
*7	Disconnects you from the conference but allows participants to continue talking: <ul style="list-style-type: none"> <li>■ 1 Continue the conference for 15 minutes</li> <li>■ 2 Continue the conference for 30 minutes</li> <li>■ 3 Continue the conference for 45 minutes</li> <li>■ 4 Continue the conference for 60 minutes</li> <li>■ 5 Continue the conference until the scheduled end time</li> <li>■ 6 Continue the conference as long as there are ports available</li> </ul>
*8	Disconnects all participants and ends the conference.
*9	Starts or stops recording (if your system is licensed for recording).
#1 (+ #)	If enabled, allows access to private conference rooms. After pressing #1, press a number ( <b>1</b> through <b>8</b> ) to access a private conference, <b>9</b> to create a new private conference, or <b>0</b> to return to the main conference. For example, <b>#12</b> would place you in the second private conference, and <b>#10</b> would return you to the main conference.
##	Disconnects you from the current conference and allows you to enter a different Conference ID.

Many of the \* commands remove you momentarily from the conference. For example, pressing \*4 removes you from the conference, plays the roll call, and returns you to the conference.

## Recording Greetings

There are two types of ConferenceManager greetings — host greetings and system greetings.

Hosts can record a greeting for a single conference, or for all conferences. If the host is also a Conference Administrator with branding permissions, the system Welcome and Blast Dial greetings can be recorded.

**Step 1.** Dial in to the conferencing system.

**Step 2.** Press **\*6** to access the greetings menu.

If you have access to system greetings, you are prompted to press **1** to access [host greetings](#) or **2** to access [system greetings](#). If not, you go directly to [host greetings](#).

### Recording Host Greetings

If you do not currently have a greeting, you are prompted to record it after pressing **\*6**. Otherwise, the system describes your greeting status: single-conference greeting, all-conference greeting, or inactive greeting. You may then choose one of the following options:

- To listen to your greeting, press **1**
- To re-record your greeting, press **2**
- To use the current greeting for the current conference only, press **3**
- To use the current greeting for all of your conferences, press **4**
- To keep the current greeting but make it inactive, press **5**
- To delete the current greeting, press **6**
- To return to the conference without making changes, press **##**

### ***Recording System Greetings***

**Step 1.** Choose one of the following options

- To record the Welcome greeting, press **1**
- To record the Blast Dial greeting, press **2**

If you have licensed the Multi-Language feature, there are two additional options (in this case options **1** and **2** are for English greetings):

- To record the Spanish Welcome greeting, press **3**
- To record the Spanish Blast Dial greeting, press **4**

**Step 2.** Choose one of the following options (for either Welcome or Blast Dial greetings):

- To listen to the greeting, press **1**
- To [re]-record the greeting, press **2**

Record your greeting (up to 3 minutes) at the tone and press **#** when you are finished.

- To save and use the new greeting (or revert to the default greeting, if a custom greeting is currently being used), press **3**
- To return to the conference without making changes, press **##**

## About the Audio Console

The ConferenceManager audio console allows you to control audio conferences online through your web browser.



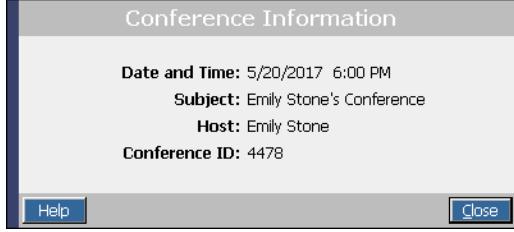
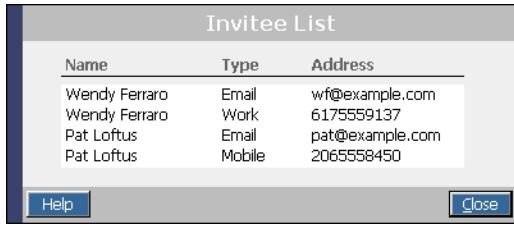
The audio console includes:

Item	Description	See
Conference Info	Displays the conference dial-in number.	—
Dial Out controls	If you have dial-out permission, allows you to dial out from the conferencing system and add participants.	"Dialing Out from the Audio Console" on page 72
Recording controls	Starts, stops, and pauses conference recording (if licensed). Recording may begin automatically when the conference starts if so configured in your <a href="#">host preferences</a> or the <a href="#">conference preferences</a> .	"Recording Conference Audio" on page 81
Participant list	Lists the audio conference participants. A  icon indicates that the participant is also part of an accompanying web conference.	"Managing Participants" on page 77

Item	Description	See
Phone controls	Standard controls mute, hold, and disconnect participants (and indicate the current mute/hold state for each). The upper (dark blue) row applies to all conference participants, while the lower (light blue) rows apply to individual participants.	<a href="#">"Managing Participants" on page 77</a>
Toolbar	Provides access to conference management functions.	<a href="#">"Managing an Audio Conference from the Console" on the facing page</a>
Private conferences	Tabs indicate separate private sub-conferences within the main conference.	<a href="#">"Conferencing in Private" on page 80</a>
Chat panel <i>(optional for audio+web)</i>	Clicking  from the web conference Chat panel presents the option of moving the chat panel to the audio console. Click  to return the Chat panel back to the web conference room window.	<a href="#">"Chatting With Participants" on page 95</a>

## Managing an Audio Conference from the Console

The following table describes the menu items on the [audio console toolbar](#):

Menu Item	Description
Conference Info	Displays the Conference Information window, which includes the conference date and time, subject, host name and conference ID, and the SIP address if applicable.  
Invitee List	Displays a list of people invited to the conference, invitees' PINs if required, and the conference password if any.  
Blast Dial	Clicking <b>Blast Dial</b> on the audio console toolbar displays the Blast Dial window, from which you can dial out to multiple participants at once. See " <a href="#">"Blast Dial" on page 75</a> ".
Quick Invite	Clicking <b>Quick Invite</b> on the audio console toolbar allows you to send invitations to new participants without leaving the conference. See " <a href="#">"Sending a Quick Invitation" on page 79</a> ".
Add Web Conference ( <i>audio only</i> )	For audio-only conferences, you can click <b>Add Web Conference</b> to reserve web ports for the conference through the Edit Conference in Progress wizard. See " <a href="#">"Editing Conferences in Progress" on page 60</a> ".
Quick Invite	Clicking <b>Quick Invite</b> on the audio console toolbar allows you to send invitations to new participants without leaving the conference, as described in " <a href="#">"Editing Conferences in Progress" on page 60</a> ".
End Conference	Click <b>End Conference</b> on the toolbar to override your default conference-end preferences. See " <a href="#">"Ending or Leaving a Conference from the Conference Room" on page 62</a> ".

## Dialing Out from the Audio Console

If your account has dial-out permission, you can dial out from the audio console to bring participants into the conference. You can dial out manually or from a list of contacts.



Option	Description
Manual via Dial Out controls (default)	Allows you to enter a single Name and Phone and dial out to it. See "Dial Out Controls" below.
From Outlook	Allows you to select a number from the Outlook Address Book.
From Address Book	Displays your Address book, from which you can dial multiple numbers.
Show Invitees List	Displays the Dial Out window, which displays entries from the Invitee List, My Address Book, or the Global Address Book, described in " <a href="#">Screened Dial Out</a> " on the facing page.
Show My Address Book	
Show Global Address Book	
Go to Blast Dial (if licensed and enabled)	Displays the Blast Dial window. See "Blast Dial" on page 75.
<i>Delegated User's Address Book</i>	If you have assigned one or more delegates, you can dial delegates' address book entries.

### Dial Out Controls

To manually dial out to a participant:

- Step 1. If the **Dial Out** controls are not visible, click the tab.
- Step 2. Enter the participant's name and a phone number or SIP address, or click **Choose Phone** to select it from the address book.  
You may see a security warning when you click Choose Phone for the first time; click **Yes** to install the link to Outlook.

**Step 3.** Click **Dial Now**.

The system dials out and connects the participant, creates a private conference named Dial Out if it does not already exist, and places the participant into that conference with you (the **private** buttons turn orange to indicate you are in a private conference).

**Step 4.** Click **private** next to the participant's name (and your own) to bring them into the main conference.

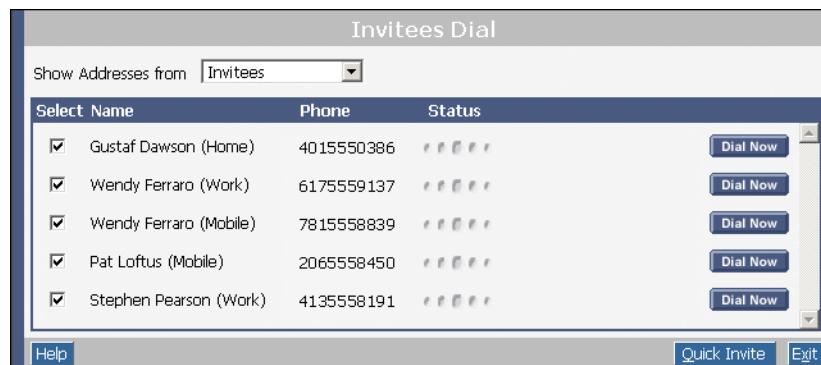
"[Conferencing in Private](#)" on page 80 describes additional options.

If your conferencing system is licensed for Blast Dial, you can bypass the private conference and bring the participant directly into the main conference by selecting the **Auto** checkbox before clicking **Dial Now**.

## Screened Dial Out

Selecting Show Invitee List, Show My Address Book, or Show Global Address Book from the audio console displays the Invitees Dial window, from which you can selectively dial out to participants.

As with the Dial Out controls, you can dial out to a single participant, bring them into a private conference, and then bring them into the main conference.



The following table describes the window:

Item	Description
Show Addresses From	Displays contact entries from the selected source.
Name / Phone	The names and phone numbers from the selected list of addresses.
Dial Order	Each contact's entry in the Address Book (see " <a href="#">Adding Contacts Manually</a> " on page 26) contains a Blast Dial field that controls whether the contact's numbers are dialed all at once, or one at a time in any chosen order of Work, Home, and Mobile.

Item	Description
Status	<p>Displays the call status; you may see the following:</p> <ul style="list-style-type: none"> <li>■ <b>Starting:</b> The audio console is waiting for confirmation that the dialout has started.</li> <li>■ <b>Calling:</b> The call was dialed but it has not yet been answered.</li> <li>■ <b>Cancelling / Canceled:</b> You clicked Cancel to stop dialout.</li> <li>■ <b>Pending Previous:</b> The dialout is awaiting the completion of a previous dialout before being started.</li> <li>■ <b>Answered:</b> The call was answered, but a join/reject selection has not yet been made. If a call remains in Answered for an extended period, the call may have gone to voicemail.</li> <li>■ <b>Joined the Conference:</b> The participant answered the call and opted to join the conference.</li> <li>■ <b>Rejected:</b> The participant answered the call but declined to join the conference.</li> <li>■ <b>Waiting:</b> The dialout has been queued but has not yet been placed.</li> <li>■ <b>Invalid Phone Number / Failed:</b> The call failed due to an invalid phone number or other error.</li> <li>■ <b>No Ports Free:</b> The conferencing system has no more audio ports available for dialout.</li> <li>■ <b>Remote Hang up:</b> The participant hung up.</li> </ul>
Dial Now	<p>Click <b>Dial Now</b> to dial out to the associated number. Once dialing begins, the button changes to Cancel until you click it to cancel the dialout, the participant joins the conference, the call is rejected, or the call fails.</p> <p>You may only dial one number at a time; while a number is being dialed, all other Dial Now buttons are disabled.</p>
Quick Invite	<p>Displays the Edit Conference in Progress window, described in "<a href="#">Editing Conferences in Progress</a>" on page 60.</p>
Exit	<p>Closes the Blast Dial window.</p>

## Blast Dial

The Blast Dial feature allows ConferenceManager to automatically dial a list of phone numbers individually or in parallel and quickly bring participants into an audio conference. Blast Dial is a separately licensed feature that your administrator must enable for your Class of Service. Note that Blast Dial brings participants directly into the conference room, bypassing the private conference.

To display the Blast Dial window, click **Blast Dial** on the audio console toolbar or select **Go to Blast Dial** from the options menu on the Dial Out control panel.

The Invitees Blast Dial window is displayed by default if there are invitees; otherwise My Address Book is displayed. You can select another list via the **Show Addresses From** menu in the Blast Dial window.



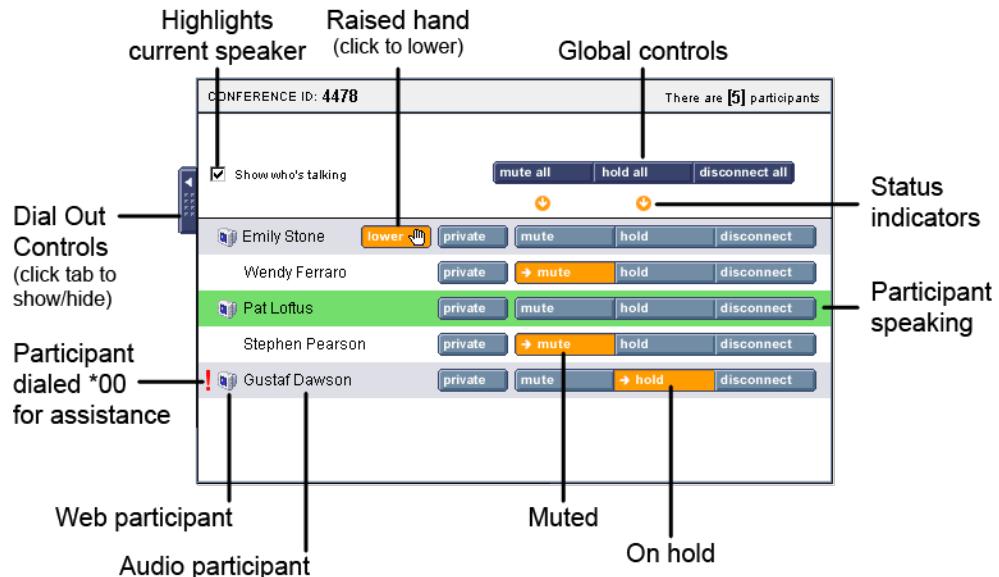
The following table describes parts of the Blast Dial window:

Item	Description
Show Addresses From	Displays contact entries from the selected source.
Select / Deselect All	Indicates whether the number will be called via Blast Dial. You can use the Select/Deselect All buttons and individual checkboxes to select the numbers to be called. If you are viewing entries from one of the address books, the entries are initially selected according to your default “Include addresses of type” preference setting.
Name / Phone	The names and phone numbers from the selected list of addresses.
Dial Order	Each contact’s entry in the Address Book (see <a href="#">“Adding Contacts Manually” on page 26</a> ) contains a Blast Dial field that controls whether the contact’s numbers are dialed all at once, or one at a time in any chosen order of Work, Home, and Mobile.
Status	Displays the call status; you may see the following: <ul style="list-style-type: none"> <li>■ <b>Starting:</b> The audio console is waiting for confirmation that the dialout has started.</li> <li>■ <b>Calling:</b> The call was dialed but it has not yet been answered.</li> <li>■ <b>Canceling / Canceled:</b> You clicked Cancel to stop dialout.</li> <li>■ <b>Pending Previous:</b> The dialout is awaiting the completion of a previous dialout before being started.</li> <li>■ <b>Answered:</b> The call was answered, but a join/reject selection has not yet been made. If a call remains in Answered for an extended period, the call may have gone to voicemail.</li> <li>■ <b>Joined the Conference:</b> The participant answered the call and opted to join the conference.</li> <li>■ <b>Rejected:</b> The participant answered the call but declined to join the conference.</li> <li>■ <b>Waiting:</b> The dialout has been queued but has not yet been placed.</li> <li>■ <b>Invalid Phone Number / Failed:</b> The call failed due to an invalid phone number or other error.</li> <li>■ <b>No Ports Free:</b> The conferencing system has no more audio ports available for dialout.</li> <li>■ <b>Remote Hang up:</b> The participant hung up.</li> </ul>
Dial Now	Click <b>Dial Now</b> to dial out to the associated number. Once dialing begins, the button changes to Cancel until you click it to cancel the dialout, the participant joins the conference, the call is rejected, or the call fails.
Quick Invite	Displays the Edit Conference in Progress window, described in <a href="#">“Editing Conferences in Progress” on page 60</a> .
Dial Selected	Queues all of the selected numbers for dialout.
Cancel Pending	Cancels all Blast Dials in progress.
Exit	Closes the Blast Dial window.

## Managing Participants

Once you have joined the conference as the host, the right side of the audio console allows you to manage audio participants. Your name always appears at the top of the list, followed by participants in the order they joined.

The phone controls turn orange when active; a  appears at the top of any column with active buttons.



The following table describes this portion of the audio console:

Item	Description
<b>Global Controls</b>	
 tab	Displays the Dial Out panel, described in "Dialing Out from the Audio Console" on page 72.
Show who's talking	When selected, a green highlight identifies the participant who is currently speaking.
mute all	Mutes all conference participants (all participant <b>mute</b> buttons become active/orange). A  below <b>mute all</b> indicates that one or more participants are muted.
hold all	Places all conference participants on hold (all participant <b>hold</b> buttons become active/orange). A  below <b>hold all</b> indicates that one or more participants are on hold.
disconnect all	Disconnects all conference participants from the audio conference.

Item	Description
<b>Participant Controls</b>	
Participant name	<p>A list of audio conference participants. The  icon identifies participants who are also in the web conference room (for audio+web conferences), while  indicates those who have dialed *00 for assistance.</p> <p>The way in which the participant joined the conference determines how they appear in the list:</p> <ul style="list-style-type: none"> <li>■ If you required PINs for the conference, the system displays the participant's name based upon the PIN they entered.</li> <li>■ If you did not require PINs but your phone system passes ANI information through, the system displays the participant's phone number.</li> <li>■ If the system has neither PIN nor ANI information, the system displays <b>participant</b>.</li> <li>■ If you dial out to the participant, the system displays the name you used on the <b>Dial Out</b> tab.</li> </ul> <p>Regardless of the information displayed, you can double-click on a participant name to edit it. Hovering the cursor over the name displays a tooltip with the participant's ANI and DNIS.</p>
lower 	<p>Identifies a participant with a raised hand; audio participants can raise their hands to be recognized by pressing *3 on their phone. Participants with raised hands are brought to the top of the list (and a <b>lower</b> button appears next to their name); if a participant in another <b>private conference</b> raises a hand, the tab turns blue.</p> <p>Click <b>lower</b> to lower a participant's hand after you recognize them. Note that raised hands in audio and web conferences are independent of each other.</p>
private	Places the participant into a private conference, as described in " <a href="#">Conferencing in Private</a> " on <a href="#">page 80</a> .
mute	<p>Mutes an individual conference participant; click the button again to unmute. Participants hear an announcement when they have been muted or unmuted.</p> <p>You can have all conferences start in <b>mute all</b> mode (lecture mode) automatically, as described in "<a href="#">Setting Your Host Preferences</a>" on <a href="#">page 19</a>; you can also set this on a per-conference basis by clicking  on the Options page of the scheduling wizards.</p>
hold	Places an individual conference participant on hold; click the button again to return them to the conference. Participants hear an announcement when they are being placed on hold (at which point they hear music) or rejoining the conference.
disconnect	<p>Disconnects an individual participant from the audio conference.</p> <p>If you try to disconnect yourself, you are prompted to confirm your intention to leave the conference.</p>

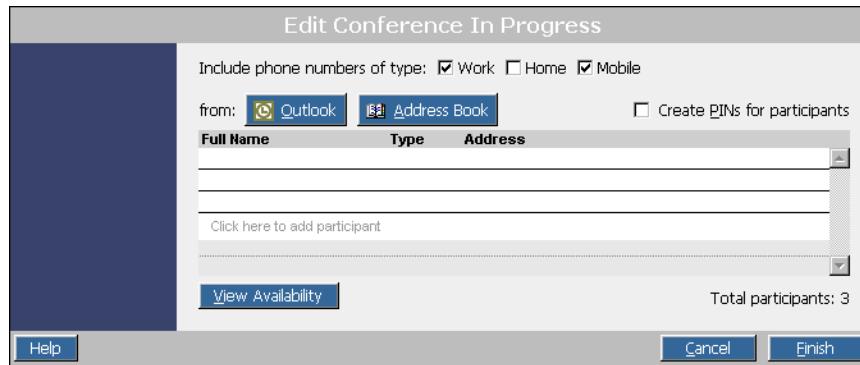
## Sending a Quick Invitation

Quick Invite allows you to invite new participants without leaving the conference.

To send a quick invitation:

- Step 1. Click **Quick Invite** on the audio console toolbar.

The Edit Conference in Progress window appears.

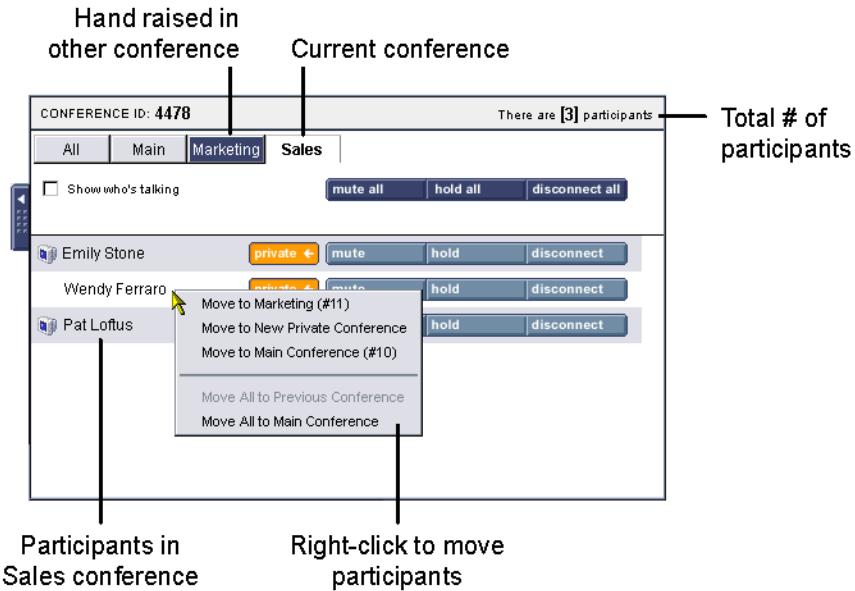


- Step 2. Enter the phone numbers (or select it from an address book) for each person you want to invite.

- Step 3. Click **OK** to send the invitation.

## Conferencing in Private

You can divide audio conference participants into one or more private conference rooms, and move participants between them as necessary.



You can create a new private conference in a number of ways:

- Use the Dial Out controls to call a participant and create a private conference named **Dial Out**.
- Click **private** to place a participant in a new private conference (named **Private**). Thereafter, clicking **private** moves a participant to the first private conference (not counting Dial Out)
- Right-click on a participant and select **Move to New Private Conference** (named **Private**)

To create additional private conferences, right-click on a participant and select **Move to New Private Conference**. Each new conference, other than Dial Out, is named sequentially (e.g., **Private 2**, **Private 3**); double-click on the conference tab to rename it. You may create up to 10 private conferences in addition to **Dial Out**. You may also predefine custom conference names via your host preferences ("Setting Your Host Preferences" on page 19).

Two additional conference tabs appear when any private conference rooms are active:

- **Main** is the original conference room.
- **All** displays participants from all conference rooms combined. If **Show who's talking** is selected, the **All** tab identifies the speakers in each conference.

To move participants between conferences, use the right-click menu:

- **Move to** options allow you to move individuals to a different conference, a new conference, their previous conference, or back to the Main conference.
- **Move All to Previous Conference** moves each participant to the conference they previously attended.
- **Move All to Main Conference** returns all participants (from all conferences) to the Main conference.

Private conference tabs are hidden when there are no participants remaining; all tabs are hidden when all participants return to the Main conference. Previously-created conferences remain as **Move to** options on the right-click menu.

## Recording Conference Audio

If your system is licensed for recording, the **Recording** controls appear in the lower-left corner of the audio console. You can record audio conferences so you can later download the recording for playback.

If you specified that a conference be recorded when you first scheduled it, recording begins immediately when the conference starts. However, you can start, pause, and stop conference recording at any time via \*9 from a telephone or the **Start/Pause/Stop** buttons from the audio console.



See "[Recording and Saving Conferences](#)" on page 121 for more information on recorded conferences.



# Chapter 6: Leading a Web Conference

You conduct web conferences using the ConferenceManager conference room. The conference room provides tools designed to help you manage and interact with your participants, share documents and applications, and collaborate in real time.

As the host, you have access to all of the conference room tools and maintain complete control over the conference. You can also allow participants to use some conference room tools or temporarily take leadership and drive the conference.

This chapter contains the following sections:

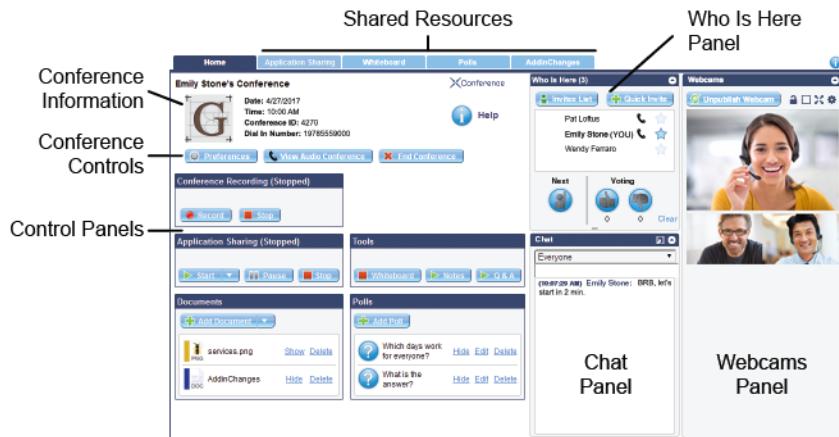
About the Conference Room .....	84
Setting Conference Room Preferences .....	87
Monitoring Participants .....	89
Interacting with Participants .....	91
Sharing Documents .....	102
Sharing Applications .....	106
Working with the Conference Room Tools .....	111

## A note about Classes of Service

Your ConferenceManager account is assigned to a Class of Service (or CoS) that determines the system features that you may access. Contact your administrator if you have any questions.

## About the Conference Room

The conference room allows the host and any participants designated as leaders to conduct the web conference. The host may [selectively enable/disable conference room features](#) by clicking **Preferences**.



The following table describes the conference room's main features:

Area	Description		Also see
Conference Information	<p>Displays the conference title, date/time, your Conference ID, and the Dial In Number if there is one. You may also upload an image/avatar to display.</p> <p>To upload an image, click the default  image to display the Change Conference Picture window. Click <b>Choose File</b> to select an image, and then click <b>Upload</b> to add it to the conference room.</p> 		
Conference Controls	<p>The conference controls appear beneath the Conference Information. Participants never see these controls, even when <a href="#">given leadership</a>.</p>		
	Preferences	<p>Allows you to configure the conference room and the options available to participants, as described in "<a href="#">Setting Conference Room Preferences</a>" on page 87.</p>	
	View/Add Audio Conference	<p>For audio+web conferences, click the  <b>View Audio Conference</b> button to display the audio console, from which you can control the audio portion of the conference.</p> <p>For web-only conferences, you can click the  <b>Add Audio Conference</b> button to reserve audio ports for the conference through the Edit Conference in Progress wizard. See "<a href="#">Editing Conferences in Progress</a>" on page 60.</p>	
	End Conference	<p>To end the conference and disconnect everyone, click the  <b>End Conference</b> button (below Conference Information) and click <b>OK</b>.</p> <p>To override your default End Conference preferences, or disconnect yourself only, see "<a href="#">Ending or Leaving a Conference from the Conference Room</a>" on page 62.</p>	

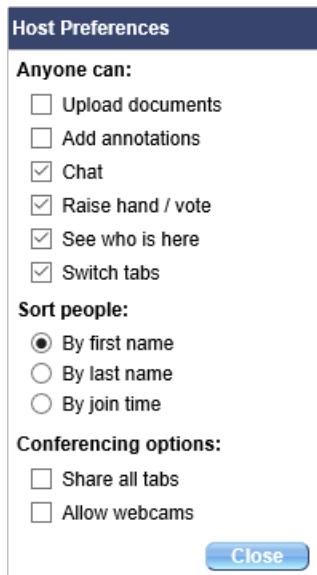
Area	Description	Also see
Shared Resources	<p>Tabs at the top of the conference room provide access to currently shared resources, which may include Application Sharing, the Whiteboard, Polls, Q &amp; A, a Notepad, and any uploaded documents. The leader controls whether individual resources are shared or not.</p> <p>Participants may view any shared resource, but when the leader selects a tab all participants' conference rooms synchronize to display that tab. Participants cannot view other resources while Application Sharing is running.</p>	
Control Panels	If appointed leader by the host (or another leader), control panels appear for Application Sharing, Tools, Documents, and Polls.	
Conference Recording	Allows you to start recording conference room activity, with synchronized audio.	<a href="#">"Recording Web Conferences" on page 122</a>
Application Sharing	Allows you to manage application sharing.	<a href="#">"Sharing Applications" on page 106</a>
Tools	Allows you to show/hide the Whiteboard, Notes, and Q & A tabs.	<a href="#">"Working with the Conference Room Tools" on page 111</a>
Documents	Allows you to add and manage documents. Individual tabs are displayed for each shared document.	<a href="#">"Sharing Documents" on page 102</a>
Polls	Allows you to create and manage polls. The <b>Polls</b> tab is displayed when one or more polls are being shown.	<a href="#">"Polling Participants" on page 98</a>

Area	Description		Also see
Who Is Here panel	The Who Is Here panel contains the Participant List, Raise Hand button, and Quick Voting buttons.		
	Invitee List	Displays the list of invited participants.	<a href="#">"Viewing the Invitee List" on page 90</a>
	Quick Invite	Allows you to invite additional participants while the conference is in progress.	<a href="#">"Sending a Quick Invitation" on page 90</a>
	Participant List	<p>The Who is Here panel lists the participants currently in attendance. Status icons indicate participants' votes and raised hands, and whether participants are also in an accompanying audio conference. The  icon identifies the current conference leader, and your name always appears in bold.</p> <p>Right-clicking in an empty portion of the Who Is Here list gives you the options to sort participants by first name, last name, or join time. Right-clicking on a participant name gives you the option to give them control or to disconnect them.</p>	<a href="#">"Seeing Other Participants"</a> <a href="#">"Transferring Leadership" on page 101</a>
	Next Hand	Allows you to recognize a raised hand when first clicked, and lowers that hand when clicked a second time. Any additional questions in the queue are reordered when a hand is lowered.	<a href="#">"Raising Your Hand"</a>
	Quick Voting	Allows you to quickly poll attendees with simple thumbs up/thumbs down voting controls.	<a href="#">"Voting"</a>
Chat panel	An instant message-style chat for communicating with participants (all at once, or individually).		<a href="#">"Chatting During a Conference"</a>
Webcams panel	Allows you to incorporate live video into your conference. You may broadcast only your own video stream, or allow conference participants to publish their streams as well.		<a href="#">"Using Webcam Video" on page 91</a>

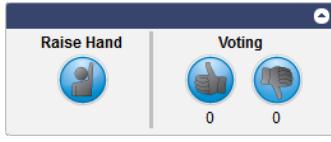
## Setting Conference Room Preferences

Your conference room preferences determine how the conference room looks to you and conference participants, and affects participant permissions if they happen to have leadership.

Click the  **Preferences** button (below Conference Information) to display the Host Preferences window.



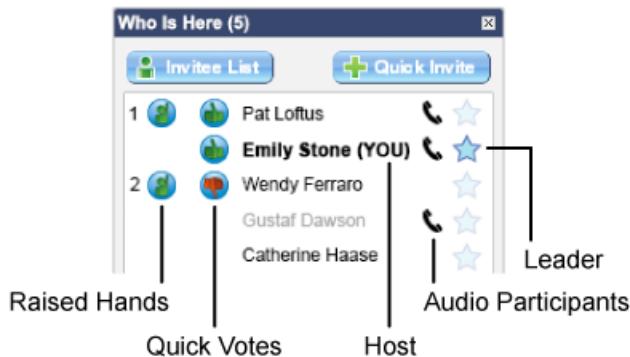
You have the following options:

Preference	Description
<b>Anyone can</b>	
Upload documents	Allows participants, if they have leadership, to use the  Add Document and  Add Poll functions.
Add annotations	Allows participants, if they have leadership, to use the annotation tools on the whiteboard and shared documents.
Chat	Enables the Chat panel for the host and participants.
Raise hand / vote	Enables hand raising and voting (independently of the Who Is Here panel). 
See who is here	Enables the Who Is Here panel (independently of the hand/voting panel) for participants. The host's Who Is Here panel is always visible.
Switch tabs	Allows participants to view conference room tabs independently of the conference leader; if the leader changes tabs, however, all participants' views change to that tab.
<b>Sort people</b>	
By first name	Sets the order in which the Who Is Here panel orders participants.
By last name	
By join time	
<b>Conferencing Options</b>	
Share all tabs	Upon clicking <b>Close</b> , shows all conference room tools, shared documents, and polls.
Allow webcams	Allows participants to publish a video stream.

## Monitoring Participants

The **Who Is Here** section of the conference room lists participants in the web conference. By default, the host is listed first, followed by participant names in the order in which they entered the conference room. To order participants alphabetically by last name, select **In alphabetical order** on your **Options** tab.

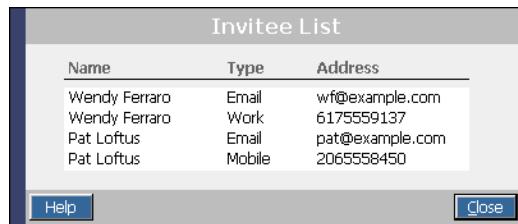
The Who Is Here section of the conference room lists participants in the web conference, and the icons next to each name indicate status.



Icon	Description	Also see
2 🌎	A raised hand, and its order in the question queue. The number and icon appear on a shaded background when you <a href="#">recognize the hand</a> .	"Recognizing Raised Hands" on page 94
🌐 / 📞	Indicates Yes and No votes.	"Taking a Quick Vote" on page 94
Emily Wendy Gustaf	As the host, your name always appears in bold. Names in black are active participants, and names in gray are idle participants (hold the pointer over the name to see how long the participant has been idle).	—
📞	A phone icon indicates that a web conference participant is also dialed in to the accompanying audio conference. (This association can be made only if the conference is using participant PINs.)	"About the Audio Console" on page 69
⭐	A filled star identifies the current conference leader.	"Granting and Regaining Control" on page 108

## Viewing the Invitee List

To view the Invitee List window, click **Invitee List** at the top of the Who Is Here panel. The window displays a list of people invited to the conference, invitees' PINs if required, and the conference password if any.



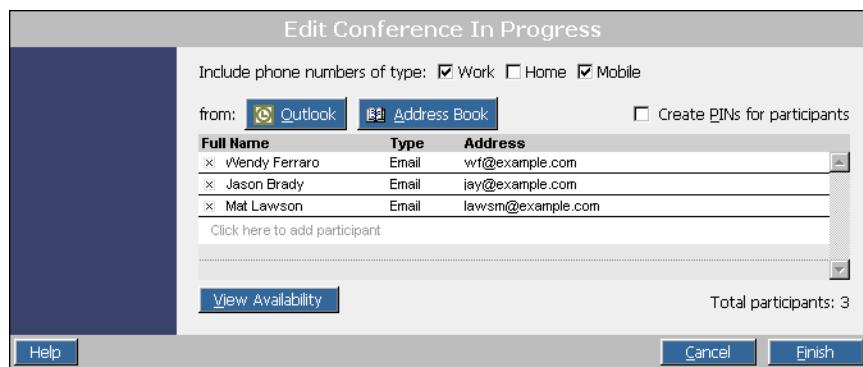
## Sending a Quick Invitation

Quick Invite allows you to invite new participants without leaving the conference.

To send a quick invitation:

- Step 1.** Click **Quick Invite** at the top of the Who Is Here panel.

The Edit Conference In Progress window appears.



- Step 2.** Enter the name and email address of the person you want to invite.

- Step 3.** Click **OK** to send the invitation.

## Interacting with Participants

The central purpose of holding a web conference is interacting and collaborating with the participants you invite, and the conference room provides many ways to do so.

This section discusses the following topics:

Using Webcam Video .....	91
Recognizing Raised Hands .....	94
Taking a Quick Vote .....	94
Chatting With Participants .....	95
Interacting with Q & A .....	96
Polling Participants .....	98
Transferring Leadership .....	101

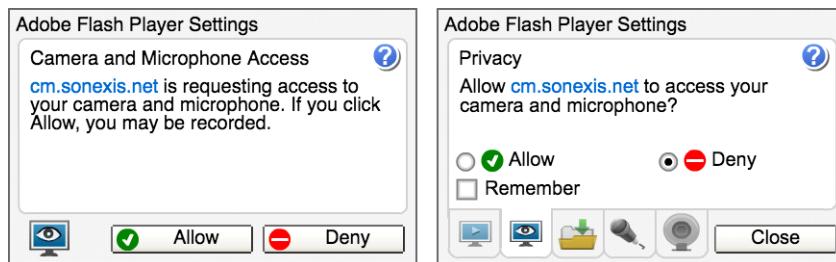
## Using Webcam Video

If your conferencing system and Class of Service support it, you can add webcam video to your web conferences. To display the Webcams panel, select Allow webcams either in your [host preferences](#) or the [conference room preferences](#).

*Webcam use requires Adobe Flash;* if you do not have Flash installed an  icon will provide a link to Adobe's download site. Once installed, the Webcams panel appears as shown below.



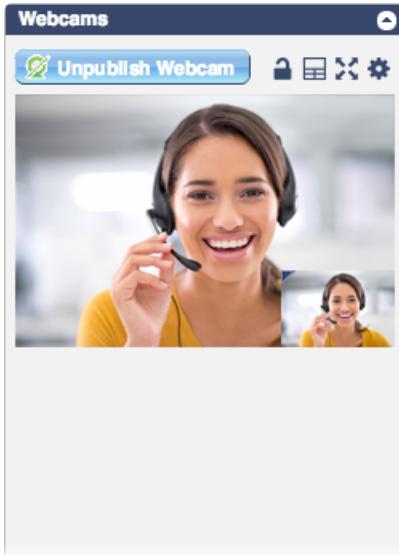
When you click  **Publish Webcam** or click  for the first time, you will see a Flash popup; select **Allow** to provide the conferencing server with access to your camera and microphone.



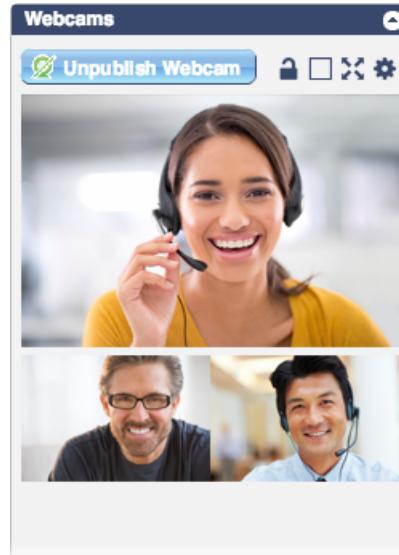
You may click  **Unpublish Webcam** at any time to stop your video stream.

Once running, the Webcams panel appears in one of two views:

- If yours is the sole video stream, or if you choose not to display participant video (single-cam view), you will see the primary video stream (yours, or a participant's, if you switch to them) and a thumbnail of your stream (if published). You may also click  to lock the Webcams panel to additional video streams; click  to unlock the panel.
- To show participants' video streams (multi-cam view) click  to display up to four additional streams. Click  to return to single-cam view.



Single-Cam View



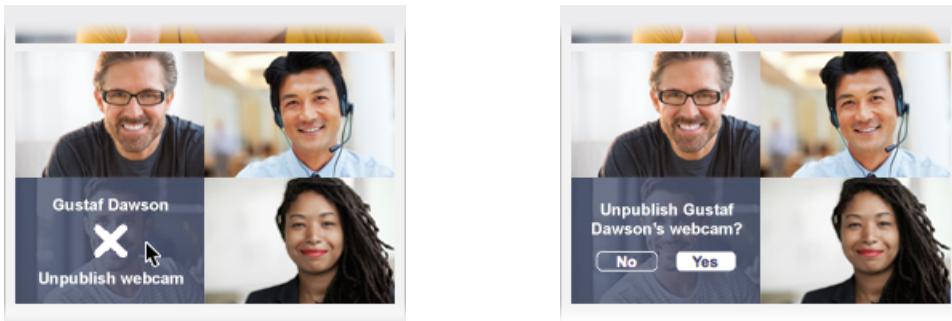
Multi-Cam View

To focus on the webcam component of a meeting, you may click  to maximize the video display. Click  to return to the conference room; note that the  /  and  /  controls also work in full-screen view.



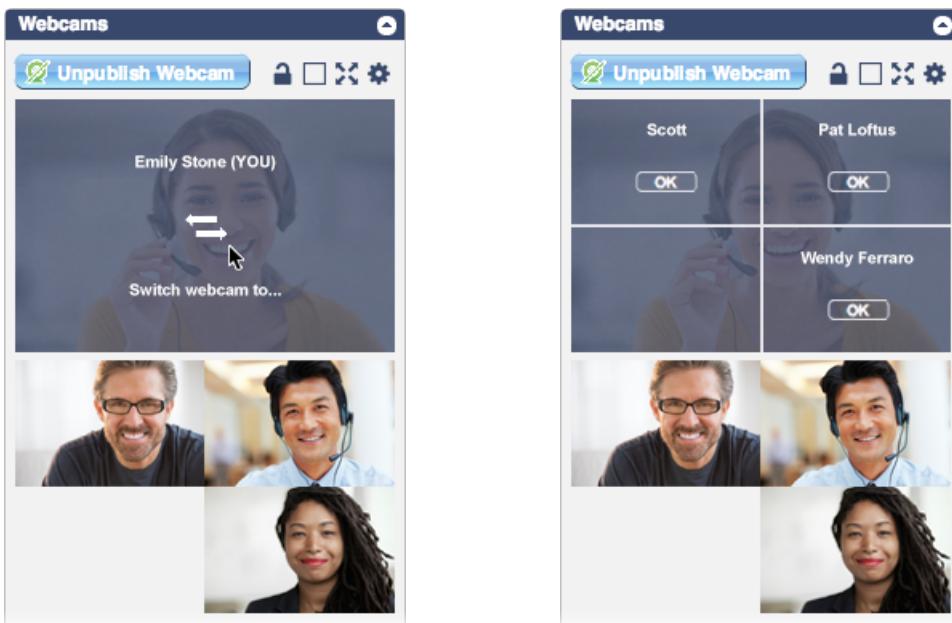
### Stopping a Participant's Video Stream

You can unpublish a participant's stream at any time by hovering over the stream, clicking the X, and then clicking **Yes** to confirm.



### Promoting a Participant's Video Stream

To assign the primary video stream to a participant, hover over your stream and click the arrow icon; then click **OK** on the stream you wish to promote. Repeat the process to promote a different stream or to reassign yours as the primary stream.



## Recognizing Raised Hands

To avoid interrupting your presentation, participants can click to raise their hand and wait to be recognized. Numbers in the Who Is Here list indicate the order in which hands were raised.



Three hands raised



First hand recognized



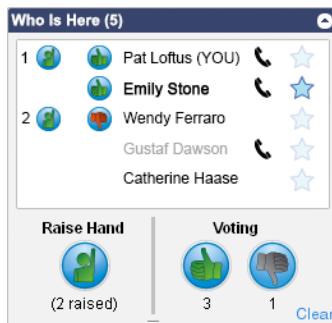
First hand lowered; order updated

- To recognize the first hand in the queue, click **Next** to highlight them and indicate that they have the floor.
- To lower their hand, click **Next** again; any remaining hands in the queue are renumbered.

Note that [raised hands in audio](#) and web conferences are independent of each other.

## Taking a Quick Vote

You can quickly survey your audience by asking a question and having participants vote using their or buttons. The Who Is Here panel displays or next to each participant's name to indicate their choice, and the total vote count is displayed below the voting controls. Votes are visible to all participants.



You may also click or to vote yourself; click the other button to change your vote or click the same button a second time to clear the vote.

Click **Clear** to clear all votes and reset the vote counter. Votes are not saved when the conference ends.

## Chatting With Participants

You can send brief messages to participants through the **Chat** panel on the lower right side of the conference room. These messages can be broadcast to everyone attending the conference, or they can be sent privately between any two people.



You may click to move the Chat panel either to a new window or to the audio console. Click to return the Chat panel back to the main web conference room window.

Note that chat transcripts, except for whispers, are saved with the conference room. You can also disable the Chat panel via your conference room **Preferences**.

To send a chat message:

- Step 1.** In the **Chat** panel, select the message recipient from the pull-down list.

Chat messages are sent to **Everyone** by default.

- Step 2.** Type your message in the input field and press **Enter** to send it.

Your message appears in the specified recipients' Chat panel. Messages sent to Everyone are preceded by "says," while one-to-one messages are preceded by "whispers."

## Interacting with Q & A

The **Q & A** tab lets participants individually pose questions to you. The question remains private until you choose to answer it, mark it as discussed, or delete it. All participants can see answered questions.

The screenshot shows the Q & A tab active in a web conference interface. The top navigation bar includes Home, Application Sharing, Whiteboard, Q & A (highlighted), and AddinChanges. The Q & A section is divided into two main areas: 'New Questions' and 'Answered Questions'. In 'New Questions', there is one entry from 'Pat Loftus': 'When will the next phase be complete?' with buttons for 'Answer', 'Discuss', and 'Delete'. In 'Answered Questions', there are two entries from 'Pat Loftus': 'really?' and 'How much bandwidth will we need?'. The 'really?' entry has an 'Answer' button and a note '(In discussion)'. The 'How much bandwidth...' entry has an 'Answer' button and a note 'about 75 Mb should do it'. To the right of these sections is a sidebar titled 'Who Is Here (3)' showing invitees: Pat Loftus (status: available), Emily Stone (YOU) (status: available), and Wendy Ferraro (status: away). Below the invitee list are 'Next' and 'Voting' buttons. The 'Voting' section shows 0 likes and 0 dislikes. At the bottom of the Q & A area is a 'Delete All Questions' button. To the right of the Q & A area is a 'Chat' sidebar with a message from Emily Stone: '(10:07:29 AM) Emily Stone: BRB, let's start in 2 min.'.

To enable the Q & A tab:

- In the **Tools** panel of the **Home** tab, click **Q & A**.

Questions appear in the upper portion of your Q & A tab. If your Q & A tab is not active, it becomes highlighted to notify you that a question is waiting.

To address a question on the Q & A tab:

- Step 1.** Click the **Q & A** tab if it is not active.

The **New Questions** section lists unanswered questions in the order they were received, though you can respond to them in any order.

This screenshot shows the Q & A tab with the 'New Questions' section highlighted. It contains one question from 'Pat Loftus': 'How much bandwidth will we need?' with buttons for 'Answer', 'Discuss', and 'Delete'.

**Step 2.** Choose to answer the question, discuss it, or delete it:

- To answer the question, click **Answer** to display a text field. Type your answer and click **Send** to post the answer to the **Answered Questions** section.

- To discuss the question, click **Discussed** link to post the answer as "In Discussion" to the **Answered Questions** section.

- If you do not want to address the question, click the **Delete** link and then confirm the deletion.

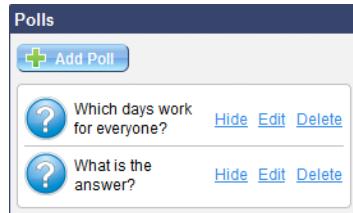
The question is removed from the My Questions section of the participant who asked it.

To delete all answered questions from everyone's Answered Questions section, click **Delete All Questions** and click **OK** to confirm the deletion.

## Polling Participants

ConferenceManager allows you to create polls that present a question and multiple answers for voting. Results are tabulated as participants vote; all votes are anonymous. Polls and poll results are [saved with the conference room](#).

The **Polls** panel on the **Home** tab contains the  **Add Poll** button and displays any existing polls. You can hide/show, edit, and delete polls from the Polls panel.



The Polls tab displays existing polls (whether shared or not) and provides additional management options.

The image shows a screenshot of the 'Polls' tab. It displays two poll entries side-by-side. The first poll is titled 'Which days work best for everyone?' and has three options: 1 M-W (1 vote(s) 50%), 2 T-Th (1 vote(s) 50%), and 3 W-F (0 vote(s) 0%). Below the options are the total votes (2) and average (1.5), followed by five buttons: 'Hide', 'Edit', 'Delete', 'Hide Results', and 'Reset'. The second poll is titled 'Which days work best for everyone?' and has three options: 1 M-W (1 vote(s) 50%), 2 T-Th (1 vote(s) 50%), and 3 W-F (0 vote(s) 0%). A red box highlights the 'This poll is hidden. Click to reveal it to everyone.' message above the options. Below the options are five buttons: 'Show', 'Edit', 'Delete', 'Share Results', and 'Reset'.

The table below describes poll options.

Option	Description
Hide/Show	Toggles between showing a poll (the default) and hiding it from participants.
Edit	Displays the Edit Poll window so you <a href="#">can edit an existing poll</a> .
Delete	Deletes the poll; click <b>OK</b> to confirm the deletion.
Share/Hide Results	Toggles between keeping poll results private and allowing participants to see the results as they are tabulated .  
Reset	Clears poll results so it can be voted upon again.

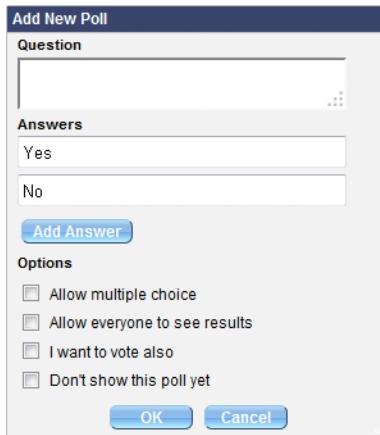
## **Adding a Poll**

You can add new polls from the **Home** tab.

To add a poll:

- Step 1.** From **Polls** panel on the **Home** tab, click  **Add Poll**.

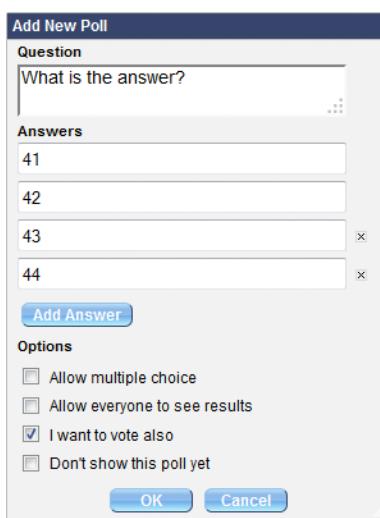
The Add New Poll pop-up appears.



- Step 2.** Type a **Question**.

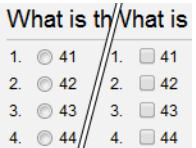
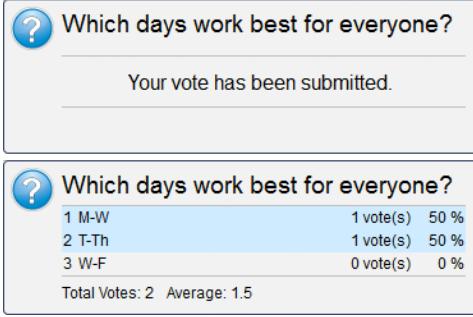
- Step 3.** Customize the **Answers** as necessary.

The defaults are Yes and No; you can edit those fields and click **Add Answer** to add additional answers.



A poll can have as many as 10 answers; click  to remove an answer.

**Step 4.** Select the **Options** to use for this poll.

Option	Description						
Allow multiple choice	Allows voters to select multiple answers (using checkboxes instead of radio buttons)						
	 <p>What is the answer?</p> <p>1. <input checked="" type="checkbox"/> 41    1. <input type="checkbox"/> 41      2. <input checked="" type="checkbox"/> 42    2. <input type="checkbox"/> 42      3. <input checked="" type="checkbox"/> 43    3. <input type="checkbox"/> 43      4. <input checked="" type="checkbox"/> 44    4. <input type="checkbox"/> 44</p>						
Allow everyone to see results	Allows everyone to see the results as they are tabulated instead of the host only.						
	 <p>Which days work best for everyone?</p> <p>Your vote has been submitted.</p> <p>Which days work best for everyone?</p> <table> <tbody> <tr> <td>1 M-W</td> <td>1 vote(s) 50 %</td> </tr> <tr> <td>2 T-Th</td> <td>1 vote(s) 50 %</td> </tr> <tr> <td>3 W-F</td> <td>0 vote(s) 0 %</td> </tr> </tbody> </table> <p>Total Votes: 2 Average: 1.5</p>	1 M-W	1 vote(s) 50 %	2 T-Th	1 vote(s) 50 %	3 W-F	0 vote(s) 0 %
1 M-W	1 vote(s) 50 %						
2 T-Th	1 vote(s) 50 %						
3 W-F	0 vote(s) 0 %						
I want to vote also	Allows you to vote in the poll.						
Don't show this poll yet	The poll appears on your Polls tab after you create it, though the poll remains hidden from participants.						
	 <p>Which days work best for everyone?</p> <p>This poll is hidden. Click to reveal it to everyone.</p> <p>1. <input checked="" type="radio"/> M-W      2. <input checked="" type="radio"/> T-Th      3. <input checked="" type="radio"/> W-F</p> <p>Show Edit Delete Share Results Reset</p>						

**Step 5.** Click **OK**.

The poll appears in the **Polls** panel and on the **Polls** tab. It is visible to participants unless you selected the **Don't show this poll yet** option.



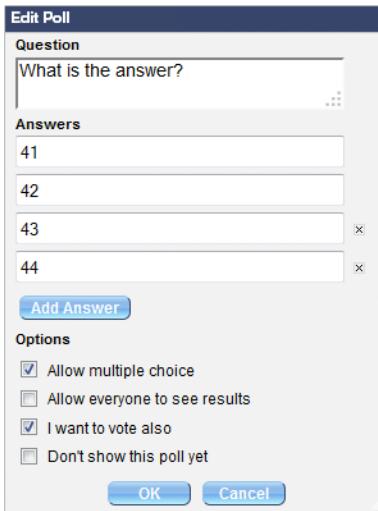
## **Editing a Poll**

You can edit a poll either from the **Polls** panel on the **Home** tab, or from the poll itself on the **Polls** tab.

To edit a poll:

- Step 1.** Find the poll you wish to edit on the **Polls** panel or tab and click **Edit**.

The Edit Poll window appears.



- Step 2.** Edit the **Question** and **Answers** as necessary.

A poll can have as many as 10 answers; click  to remove an answer.

- Step 3.** Change the **Options** used for this poll if necessary.

- Step 4.** Click **OK**.

## **Transferring Leadership**

The host can transfer leadership of the web to a conference participant, who becomes the new leader and has control over most conference resources:

- [Polling](#)
- [Q & A](#)
- [Document Sharing](#)
- [Application Sharing](#)
- [Whiteboard](#)
- [Notes](#)

To transfer leadership to a participant:

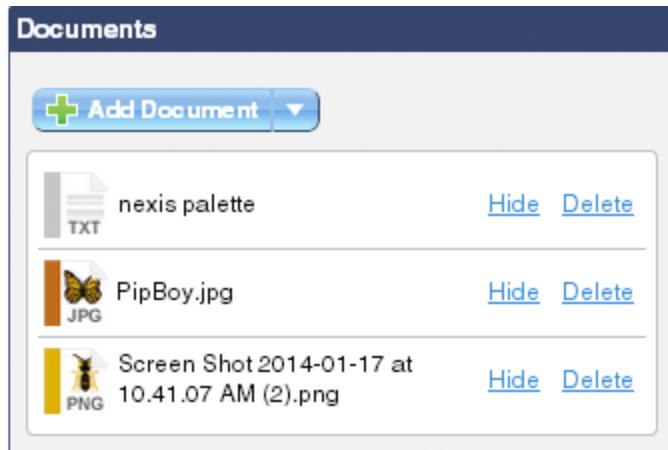
- Click a participant's name and select **Give Control to**, or click their  icon in the **Who Is Here** panel.  
That icon changes to  and yours changes to ; your name remains bolded.

You can reclaim leadership at any time by clicking the  icon next to your name.

## Sharing Documents

You can share any type of document by uploading it to the conference room; you can allow participants to upload documents, when given leadership, by selecting **Upload documents** in your [conference room preferences](#).

You can hide/show or delete documents from the **Documents** panel at any time. If you granted participants permission to add documents, they are able to remove their own documents.



Document sharing requires a driver to be installed on each PC that uploads documents, as described in "[Installing Optional Components](#)" on page 7.

This section discusses the following topics:

<a href="#">Uploading Documents to the Conference Room</a>	102
<a href="#">Converting Unsupported Document Types</a>	103
<a href="#">Viewing and Annotating Shared Documents</a>	104
<a href="#">Using the Annotation Tools</a>	104

### Uploading Documents to the Conference Room

Before sharing a document with other participants, you must add it to the conference room. ConferenceManager natively supports PDF and image upload; the Browser Plugin is required for sharing Microsoft Office documents (.ppt/.pttx, .xls/.xlsx, .doc/.docx). Other document types can be converted using the Document Sharing Print Driver.

To add a document to the conference room:

**Step 1.** From the **Documents** panel on the **Home** tab, click **Add Document**.

To share a document that you have converted, click the right side of the Add Document button ( ) and select **Printed Documents**.

**Step 2.** Browse to and select the document you wish to upload, and then click **Open**.

A progress bar indicates progress as the file is imported and uploaded to the conference room. When the upload is complete, the document appears in a new tab and in the **Documents** panel.

Uploaded documents are shared immediately. If you wish to upload a number of documents without sharing them, you can [pre-set the conference room](#) before the conference begins.

If the upload fails, try [converting it](#) to a Printed Document as described in "Converting Unsupported Document Types" below.

- Very large documents may not upload successfully; you can try [converting it](#) to a Printed Document, or break it up into smaller pieces.
- If you are uploading a PowerPoint 2003 document you have the option to preserve PowerPoint effects, though the slides cannot be annotated within the conference. Try the other import option or [convert it](#) to a Printed Document.

## Converting Unsupported Document Types

If you want to share a document type that ConferenceManager does not directly support, or if the document is too large to upload, you can convert it to a sharable format via the ConferenceManager Document Sharing Print Driver and then upload it.

To convert other document types:

- Step 1.** Open the document in the application that created it.
- Step 2.** Choose **File > Print** from the application menu.
- Step 3.** Select **ConferenceManager** as the printer and click **OK**.

If you do not have the driver installed on your PC, you are given the option to install it.

- Step 4.** Select the **Color Quality** and rename the document if necessary.

Select **Normal Color** to optimize the file for the best performance (which may reduce the color depth), or select **Photo Color** to maintain the original color depth.

- Step 5.** Click **OK**.

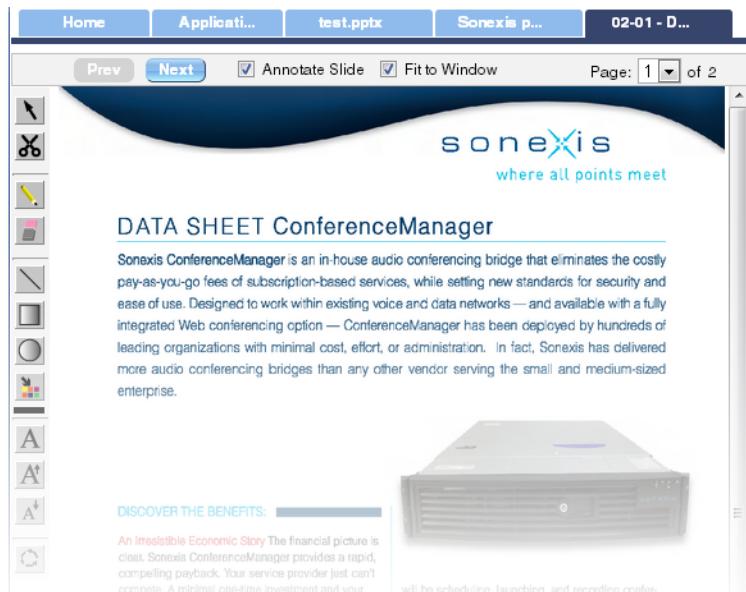
The ConferenceManager print driver converts the file into a shareable .cmzip file and saves it on your PC in C:\ProgramData\Sonexis\ConferenceManager Print Driver\Documents\.

After converting the document, you can [upload](#) it via **Add Document**  > **Printed Documents**.

## Viewing and Annotating Shared Documents

After [uploading](#) a document, it is shared by default on its own conference room tab.

- Click **Prev** or **Next** to move backward or forward through multi-page documents, or select a **Page** to view.
- Select **Annotate Slide** to display the [annotation tools](#).
- Select **Fit to Window** to scale the document so the whole page is visible.



You can annotate shared documents as described in "[Using the Annotation Tools](#)" below. Note that document annotations are not saved with the conference room.

### Using the Annotation Tools

Click the **Whiteboard** tab or a shared document from the **Documents** panel to display the annotation tools. Normally, only the host can see and use the annotation toolbar, though you can grant permission for participants to use the toolbar via the [Add Annotations preference](#).

Whiteboard annotations are saved with the conference room so you can work with them in follow-up conferences; document annotations, however, are not saved.

The following table describes the annotation tools. To clear the entire whiteboard, click and click **OK** to confirm the deletion.

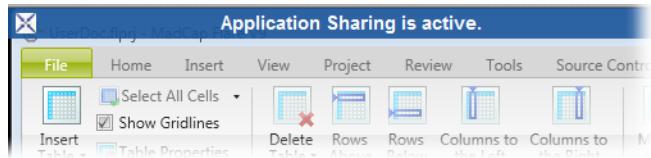
Task	Procedure
<b>Drawing Freehand</b>	
To draw freehand:	<ul style="list-style-type: none"> <li>■ Click  and select a line color.</li> <li>■ Click .</li> <li>■ Hold the mouse button down to draw.</li> </ul>

Task	Procedure
To erase freehand drawing:	<ul style="list-style-type: none"> <li>■ Click .</li> <li>■ Hold the mouse button down to erase.</li> </ul> <p>You cannot use  to erase portions of objects or text; select the object or text with  and press <b>Delete</b>.</p>
<b>Drawing Objects</b>	
To draw objects:	<ul style="list-style-type: none"> <li>■ Click  and select a line color.</li> <li>■ Click , , or  to draw a line, rectangle, or ellipse.</li> <li>■ Click and drag the mouse to create the shape.</li> </ul>
To move objects:	<ul style="list-style-type: none"> <li>■ Click .</li> <li>■ Click and drag the object to a new position.</li> </ul>
To resize objects:	<ul style="list-style-type: none"> <li>■ Click .</li> <li>■ Click on the object, click on a handle, and drag out to resize the object.</li> </ul>
To delete objects:	<ul style="list-style-type: none"> <li>■ Click .</li> <li>■ Click on the object and press <b>Delete</b> (or click ).</li> </ul>
<b>Typing Text</b>	
To create text annotations:	<ul style="list-style-type: none"> <li>■ Click  and select a text color.</li> <li>■ Click  or  to adjust the text size.</li> <li>■ Click , click where you want to place the text, and then type.</li> </ul>
To move text:	<ul style="list-style-type: none"> <li>■ Click  and then click on the text so that a handle appears.</li> <li>■ Click the handle and drag the text to a new location.</li> </ul>
To edit text:	<ul style="list-style-type: none"> <li>■ Click  and double-click the text you want to edit.</li> <li>■ Select text and edit it, or reformat it using  or /.</li> </ul>
To delete text:	<ul style="list-style-type: none"> <li>■ Click  and then click on the text so that a handle appears.</li> <li>■ Press <b>Delete</b> (or click ).</li> </ul>

## Sharing Applications

Application sharing lets you share your PC desktop and applications with other conference participants. Participants initially see a full-screen view of your desktop or application in the presentation area of their conference rooms. Thereafter, participants see everything you do as it happens — including pointer movements, scrolling, and typing. Your CoS must Enable Application Sharing (viewing shared applications is always allowed).

ConferenceManager always displays the Application Sharing banner at the top of your screen, and the  icon in the system tray when Application Sharing is active.



This section discusses the following topics:

<a href="#">Application vs. Desktop Sharing</a>	106
<a href="#">Starting Application Sharing</a>	107
<a href="#">Granting and Regaining Control</a>	108
<a href="#">Pausing and Resuming Sharing</a>	109
<a href="#">Selecting a New Application to Share</a>	110
<a href="#">Stopping Sharing</a>	110

### Application vs. Desktop Sharing

Application sharing behaves somewhat differently than Desktop sharing:

- When you allow a participant to control an application, that participant has control of that application only. When you allow a participant to control your Desktop, however, you are essentially transferring complete control of your PC — the participant can change system settings, access network resources, and run applications as if sitting at your desk.
- Applications remain shared only while they are open and active. Minimizing or closing the application, or changing focus to another window pauses application sharing. Your desktop remains shared until you take control and pause or stop sharing.

In either case, the Application Sharing icon  appears in your Windows system tray to indicate that sharing is active. You access the application sharing menu by right-clicking the  icon. Holding your pointer over the  icon displays a tooltip identifying the shared application or desktop and whether sharing is active or paused.

## Starting Application Sharing

The host or conference leader can start application sharing from the conference room, and then choose whether to share the Desktop, an application, or choose another participant to act as the presenter.

Note that sharing applications and maintaining a real-time view for conference participants requires a great deal of bandwidth. If you experience performance issues, try setting your display to a lower resolution.

To immediately start sharing your Desktop:

- Click the **Start** button in the Application Sharing panel.
- To share the Desktop of a non-primary monitor, click the right side of the **Start** button and select it from the list.

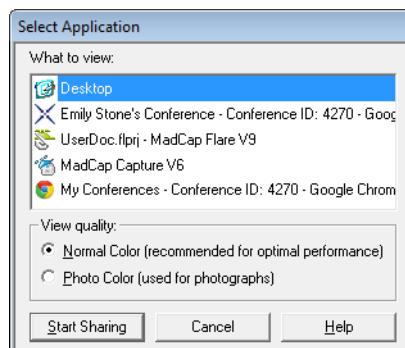
To start application sharing with yourself as the presenter:

**Step 1.** Click the right side of the **Start** button in the Application Sharing panel and select **My Applications**.



**Step 2.** Select an application to share from the Select Application window.

You may also select your Desktop or the Desktop of an additional monitor.



**Step 3.** Modify the View quality if necessary.

- **Normal Color** broadcasts 16-bit color (thousands of colors), which provides participants with excellent images for both text and graphics using a fraction of the bandwidth required for Photo Color. This setting is recommended for best performance.
- **Photo Color** broadcasts 32-bit color (billions of colors), which should be used only for sharing photographs or other documents where the most demanding color precision is important. This setting requires much more bandwidth than Normal Color and is slower.

**Step 4.** Click **Start Sharing**.

## Granting and Regaining Control

When Application Sharing is active, participants can request control of the presenter's shared desktop or application by clicking ; the request is displayed in the host's Application Sharing banner.



(This is different than transferring leadership, which grants control of the conference room as discussed in "Transferring Leadership" on page 101.)

### Granting Control

To grant control:

- Step 1.** Right-click the icon or the Application Sharing banner and select **Share Control With** to display a list of participant names.

A hand identifies participants who have requested control; a identifies the participant currently in control, if any.



- Step 2.** Select a participant to grant them control.

A message tells the participant to click the mouse to take control. While in control, participants can only access the **Stop Sharing** and **Help** options on the application sharing menu.

### Sharing Control

Your pointer echoes the participant's mouse movements, but only one person can have control at a time. You and the participant can exchange control with each other at any time by clicking the mouse.

### **Reclaiming Control**

You can click your mouse to regain control, though the participant who had control can still claim control until you access the **Share Control With** list again and select the participant's name to clear the .

To stop sharing control with a participant:

- Step 1.** Click your mouse to regain control.
- Step 2.** Right-click the  icon or the Application Sharing banner, select **Share Control With**, and select the participant's name to clear the .

That participant is notified that control has been withdrawn.

Participants can also return control to you by clicking the **Stop** button at the top of their screen.

### **Automatically Accepting Control Requests**

You can configure Application Sharing to automatically accept control requests so participants can immediately take control upon request. When that participant clicks their mouse, you are notified that control has been taken. If a second participant requests control, control is passed on to that participant in the same manner.

- To automatically accept control requests, right-click the  icon and select **Accept Control Requests Automatically**. Any queued control requests are cleared and the first participant who requests control can take it.
- To stop automatically accepting control requests, select **Accept Control Requests Automatically** again to uncheck it.

### **Pausing and Resuming Sharing**

Applications remain shared only while they are open and active. Minimizing or closing the application, or changing focus to another window pauses application sharing (indicated by the flashing Application Sharing icon). Sharing resumes when you make the application active again.

If you are sharing your desktop, or if you wish to work offline in the shared application, you must manually pause sharing:

- Right-click the  icon or Application Sharing banner and select **Pause Sharing**.
- Participants see a notice that application sharing is paused and a static image of the last image broadcast before the pause. The Application Sharing icon flashes to indicate that sharing is paused, and any actions you take on your PC are not broadcast.

When you are ready, you can resume sharing:

- Right-click the  icon or Application Sharing banner and select **Resume Sharing**.
- The current view of your desktop or application is broadcast to participants.

You can also use the  **Pause/Resume** controls in the Application Sharing panel.



## Selecting a New Application to Share

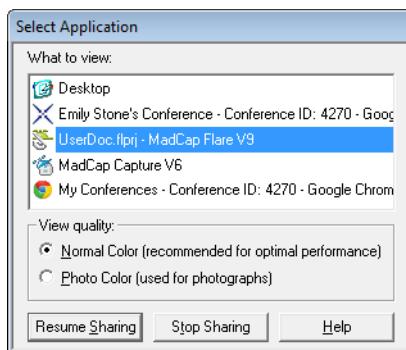
When sharing your desktop, you can switch between applications as you normally would, and participants can see you switch applications. When sharing an application, however, participants see only the active application so you must select a new application from the Select Application window.

If you wish to use the conference room, you can bring that window to the front without selecting a new application or pausing sharing. If you were sharing your desktop with participants, they see the conference room; if you were sharing an application, participants see a message that application sharing is paused.

To select a new application:

- Step 1.** Right-click the  icon and select **Select Application**.

The Select Application window appears, and participants see a message that application sharing is paused.



- Step 2.** Select a new application to share.

- Step 3.** Click **Resume Sharing**.

Clicking **Resume Sharing** without selecting anything resumes sharing with the same application.

## Stopping Sharing

When you stop application sharing, the conference room is brought back to the front, the conference information is displayed in the presentation area, and the Application Sharing icon no longer appears in the system tray.

You can stop application sharing in a few ways:

- Right-click the  icon or the Application Sharing banner and select **Stop Sharing**.
- From the Select Application window, click **Stop Sharing**.
- Click the **Home** tab and then click  **Pause** or  **Stop** in the Application Sharing panel.



## Working with the Conference Room Tools

The Tools panel in the conference room controls the availability of the **Whiteboard**, **Notes**, and **Q & A** tabs.



### Using the Whiteboard

When you click ➤ **Whiteboard** in the Tools panel, the **Whiteboard** tab is displayed.

The whiteboard can be useful for simple drawings. With respect to annotation, it behaves like other shared documents. You can draw or write using the annotation tools as described in "[Using the Annotation Tools](#)" on page 104, as can participants if you [give them leadership](#). Whiteboard annotations are saved with the conference room so you can work with them in follow-up conferences.

Click ■ **Whiteboard** to stop sharing the **Whiteboard** tab.

### Taking Notes

When you click ➤ **Notes** in the Tools panel, the **Notes** tab appears.

The notepad is a simple text editor into which you can type conference notes. Notepad contents are saved with the conference room at the end of a conference, and the conferencing system emails you copy of the notes even if you do not choose to save the conference room.

Click ■ **Notes** to stop sharing the **Notes** tab.

### Conducting Q & A

The question-and-answer feature lets participants individually pose questions to the leader and have them answered; see "[Interacting with Q & A](#)" on page 96 for details.



# Chapter 7: Acting as a Delegate

A ConferenceManager delegate is an account that has the authority to “become” the host for a predetermined set of host accounts assigned by the system or tenant administrator. Delegates may also be given the authority to create and edit host accounts, and may have more authority to edit those accounts than the hosts themselves.

ConferenceManager delegation is independent of the Outlook delegation discussed in ["Scheduling Conferences with Outlook" on page 39](#).

This chapter contains the following sections:

Selecting a Host Account .....	114
Acting on Behalf of a Delegated Host .....	115
Managing Delegated Accounts .....	117
Viewing Your Delegates .....	120

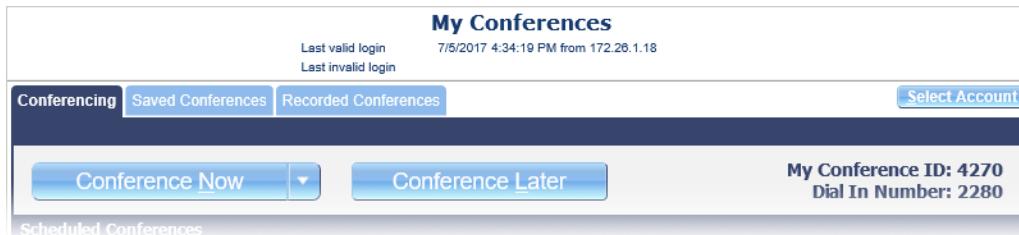
## A note about Classes of Service

Your ConferenceManager account is assigned to a Class of Service (or CoS) that determines the system features that you may access. Contact your administrator if you have any questions.

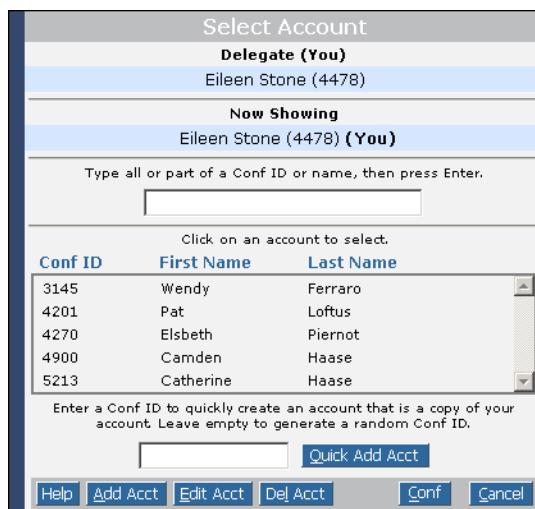
## Selecting a Host Account

Delegates have a **Select Account** button at the top of their My Conferences page, which allows them to act as the delegated host. To select a host account:

- Step 1. Click **Select Account** at the top of your My Conferences page.

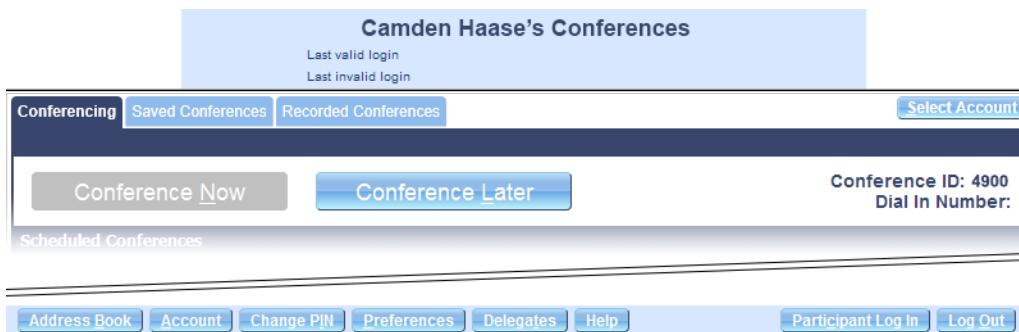


The Select Account panel appears.



- Step 2. Select a delegated account from the list.

After selecting a delegated account from the Select Account panel, your My Conferences page is replaced by that account's My Conferences page; the account owner's name is displayed at the top of the page.



You can leave the Select Account panel open so you can readily switch accounts. Note that a red asterisk before the ID indicates that the account has a status of Canceled; select the account to reactivate it.

## Acting on Behalf of a Delegated Host

After selecting a delegated account from the Select Account panel, you are effectively viewing “their” My conferences page.

The screenshot shows the 'My Conferences' page for 'Jack Sparr's Conferences'. At the top, it displays the last valid login (7/11/2017 2:53:23 PM) and last invalid login (1/14/2017 1:47:40 PM). Below this, there are tabs for 'Conferencing' (selected), 'Saved Conferences', and 'Recorded Conferences', along with a 'Select Account' button. A large button labeled 'Conference Now' is visible. On the right, conference details are shown: Conference ID: 4222 and Dial In Number: 2280. A table lists a scheduled conference: Date 16-Jul-2017, Time 11:30 AM, Duration 0:30, Recurs (checkbox checked), Record (checkbox checked), Audio 4, Web 4, Subject Sales Demo. At the bottom, there are buttons for 'Send Update', 'Start', 'Set Up', 'Edit...', 'End...', 'Address Book', 'Account', 'Change PIN', 'Preferences', 'Delegates', 'Help', and 'Log Out'.

The account’s My Conferences page displays the following controls:

Item	Description	For More Information See
Conference Now	Not available; you cannot start a conference on behalf of a delegated account.	
Conference Later	Starts the Conference Later wizard to reserve ports for a scheduled conference.	"Scheduling Conferences with ConferenceManager" on page 32
Select Account	Displays the Select Account panel.	"Selecting a Host Account" on the previous page
Address Book	Opens the host’s Address Book.	"Using Your Address Book" on page 25
Account	Displays the host’s account settings.	"Managing Delegated Accounts" on page 117
Change PIN	Displays the Change PIN page.	"Changing Your PIN" on page 18
Preferences	Displays the host’s preferences.	"Setting Your Host Preferences" on page 19
Delegates	Displays a list of the host’s delegates.	"Viewing Your Delegates" on page 120
Help	Displays the online help.	
Log Out	Logs you out of ConferenceManager.	

After scheduling or modifying a conference, confirmations are sent out “from” the host account.

Options may vary on the Recorded Conferences tab, as recording playback, download, and deletion are individually permissioned by the administrator.

Since a delegate may be acting on behalf of a host that does not have privileges to do certain tasks, the following buttons will always be available regardless of the host's settings:

Section	Always Available
Conferences in Progress	Send Update, Edit, End
Scheduled Conferences	Send Update, Edit, Cancel
Saved Conferences	Invitee List, Follow Up Later, Delete

## Managing Delegated Accounts

If your CoS has Delegation Acct Management enabled, you can create new delegated accounts as needed, edit any existing account delegated to you, and delete accounts you created. If the Select Account panel is not open, click **Select Account** from your My Conferences Page.

Conf ID	First Name	Last Name
3145	Wendy	Ferraro
4201	Pat	Loftus
4270	Elsbeth	Piernot
4900	Camden	Haase
5213	Catherine	Haase

### One-Click Account Creation

Quick Add allows you to create a new account that is a copy of yours. You may enter a Conference ID first, or just click **Quick Add Acct** to generate a random Conference ID according to the system defaults (e.g., number of digits; see the *System Administrator's Guide* for more information).

## Adding and Editing Accounts

**Step 1.** Click **Add Acct** to create a new account, or select an account and click **Edit Acct** to modify it.

The New User's Account window appears (or, if modifying, the existing user's Account window).

New User's Account

\* Conference ID:

\* First name:

\* Last name:

\* E-mail address:

\* Time zone:  -Choose one-

Phone:  Extension:

Conference Password:

\* PIN:

\* Confirm PIN:

Class of Service:  Default

Blast Dial Priority:  Low

Department Code:

Send an email when saving:

Help

Camden Haase's Account Conference ID: 4900

\* Conference ID:  4900

\* First name:  Camden

\* Last name:  Haase

\* E-mail address:  cami@example.com

\* Time zone:  (GMT-05:00) Eastern Time (US & Canada)

Phone:  Extension:

Conference Password:

Class of Service:  Default

Blast Dial Priority:  Low

Department Code:

Send an email when saving:

Help

**Step 2.** Fill in the fields as appropriate.

Fields are pre-filled with values from the default account settings, if any.

Field	Description
Conference ID	Conference ID for this account (4-12 digit number). This value can be generated randomly as specified in the default account settings.
First Name	First name of the account owner.
Last Name	Last Name of the account owner.

Field	Description
Email Address	Email address of the account owner.
Phone / Extension	Phone number of the account owner.
Time Zone	Time zone of the account owner; this field is pre-filled from the default account settings.
Conference Password	If the account's CoS allows (or requires) it, you can create a 4-8 digit conference password for additional security; participants must enter this password to join conferences, in addition to any PIN that may be required.
PIN Confirm PIN	Personal Identification Number for this account (4-8 digit number); this value can be generated randomly as specified in the default account settings. The administrator may require a minimum PIN length and may not allow the PIN to match the Conference ID.
Class of Service <i>(single-tenant systems only)</i>	The class of service (CoS) for this account; this field is pre-filled from the default account settings. If the existing classes of service do not contain the appropriate settings for this account, your system administrator can add a new class.
Blast Dial Priority	If the selected CoS allows Blast Dial, the CoS determines whether the account queues Blast Dial calls with Low (the default) or High priority.
Department Code	Department Code for this account; this field is pre-filled with the Department Code from the default account settings, if any.
Send an email when saving	Notifies the account owner (Email Address) that the account has been created or updated. By default, this option is checked when creating an account, and unchecked when editing an account.

**Step 3.** Click **Save**.

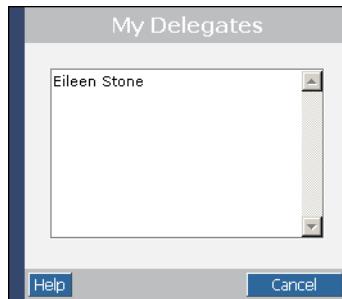
The account is created; it appears selected in the Select Account panel, and the account's My Conference page is displayed.

## Deleting Accounts

To delete an account that you created, select it and click **Del Acct**.

## Viewing Your Delegates

If your account is delegated (per the Allow Delegation CoS), a **My Delegates** button appears at the bottom of your My Conferences page. Click it display a list of delegates who may control your account (for scheduling conferences on your behalf, etc.). See [Chapter 7, "Acting as a Delegate"](#) for more information on delegates.



# Chapter 8: Recording and Saving Conferences

If your conferencing system is licensed for recording, you can record and save a conference (whether audio or web) conferencing system. After the conference you can [download](#) the recordings for playback and distribution.

You also have the ability to save conferences and conference room content for use in additional follow-up conferences. Note that saving a conference is unrelated to recording a conference — recording saves the conference audio (and web interaction, if applicable) but the list of invitees and conference room contents (such as uploaded documents) are preserved only by saving the conference.

This chapter contains the following sections:

Recording Audio Conferences .....	122
Recording Web Conferences .....	122
Downloading and Playing Recorded Conferences .....	122
Deleting Recorded Conferences .....	123
Working with Saved Conferences .....	124

## A note about Classes of Service

Your ConferenceManager account is assigned to a Class of Service (or CoS) that determines the system features that you may access. Contact your administrator if you have any questions.

## Recording Audio Conferences

If your conferencing system is licensed to record audio, ConferenceManager can record your conferences and save an audio file that you can access from your My Conferences page.

You can specify that a conference be recorded when you first schedule it or through your host preferences, though you can still start and stop recording at any time.

- From the phone, press \*9 to start and stop recording.
- From the audio console, use the **Recording** controls to start, stop, and pause the recording.



If you checked **Record Audio** when scheduling the conference, participants' conference invitations include a notice that the conference may be recorded. Once such a conference begins, all conference participants hear an announcement that the conference may be recorded. If you stop and restart recording during the conference, only you hear the recording status.

The Recorded Conferences tab of your My Conferences page lists your recorded audio conferences; see "[Managing Recorded Conferences](#)" on page 16 for details.

## Recording Web Conferences

If your conferencing system is licensed for Recording and your Class of Service has *Allow Recording* enabled, you will see the Conference Recording panel in the conference room; you may also control recording via the controls on the audio console.

When recording web conferences, ConferenceManager captures conference audio synchronized with the host's view of the conference room and saves it in MP4 format.



## Downloading and Playing Recorded Conferences

When you end a conference that has been recorded, ConferenceManager saves the recording as follows for download and playback:

- **Audio** recordings are initially saved as uncompressed WAV files, and the Recorded Conferences section of the My Conferences page displays the size in red to indicate that the file has not yet been compressed. After the file is compressed, the system saves it in WMA (Windows Media Audio) format and deletes the WAV file; the Recorded Conferences section then displays the file size in black.
- **Web** recordings (with or without audio) are saved in MP4 format.

The conferencing system sends you an email with a link to download the file after it is processed (though you can download and play an uncompressed WAV file if the compressed WMA file has not yet been created).

To play a recorded conference within ConferenceManager:

- Step 1. From the **My Conferences** page, click the **Recorded Conferences** tab and select a conference.
- Step 2. Click **Play**.

To download a recorded conference:

- Step 1. From the **My Conferences** page, click the **Recorded Conferences** tab and select a conference.
- Step 2. Click **Download**.
- Step 3. Click **Save** in the File Download window.
- Step 4. Specify a file name and location and click **Save**.
- Step 5. Click **Close** to close the File Download window.
- Step 6. Double-click the file to open it.

Both QuickTime and Windows Media Player support WAV files. WMA files are native to Windows Media Player, though you can download the Windows Media Components for QuickTime from Microsoft.

## Deleting Recorded Conferences

Your administrator may configure recordings to automatically expire (and be deleted) after a given period of time; you may also delete your own recordings manually.

To delete a recorded conference:

- Step 1. From the **My Conferences** page, click the **Recorded Conferences** tab and select a conference.
- Step 2. Click **Delete**.
- Step 3. Click **OK** to confirm the deletion.

## Working with Saved Conferences

Conference setup information and web conference room content are usually deleted when a conference ends. You can, however, choose to save a conference on the ConferenceManager server. Conference setup information is saved for both audio and web conferences, and you can re-enter a saved web conference room to review or retrieve the contents, make changes if necessary, and prepare to re-use the room to host a follow-up conference.

For example, you can save a web conference room with all of your notes and diagrams, and then re-use the room to present the same lecture again.

This section discusses the following topics:

Saving a Conference .....	124
Managing Saved Conferences .....	125
Entering a Saved Conference Room .....	126
Hosting a Follow-up Conference .....	126
Deleting a Saved Conference .....	127

### Saving a Conference

When you save a conference room, most of the conference setup information and conference room content (for web conferences) is saved:

Saved setup information	Saved conference content (Web)
<ul style="list-style-type: none"><li>■ Conference duration</li><li>■ Port configuration</li><li>■ Record conference setting</li><li>■ Subject</li><li>■ Password</li><li>■ Preferences</li><li>■ Security level</li><li>■ Participant list</li></ul>	<ul style="list-style-type: none"><li>■ Uploaded documents</li><li>■ Whiteboard diagrams</li><li>■ Notes</li><li>■ Polls</li><li>■ Questions</li></ul>

Items that are **not** saved include chat transcripts and document annotations.

Your host preferences determine whether conferences are normally saved or not, though you can also override your preferences either during conference scheduling or as you end a conference.

To override your save preferences as you end a conference:

- Step 1.** From the audio console or conference room, click **End Conference**.

The End Conference window appears.



- Step 2.** Select a save option from the **When the conference ends** list.

- Step 3.** Click **OK**.

To edit your default save preferences:

- Step 1.** From the **My Conferences** page, click **My Preferences**.

- Step 2.** Select a save option from the **When the conference ends** list.

- Step 3.** Click **Save**.

To override your save preferences when scheduling a conference:

- Step 1.** While scheduling a conference with the Conference Now or Conference Later wizards, go to the **Options** (third) page of the wizard and click **Preferences**.

- Step 2.** Select a save option from the **When the conference ends** list.

- Step 3.** Click **OK**.

## Managing Saved Conferences

Your saved conference rooms are listed on the **Saved Conferences** tab of the My Conferences page.

Saved Conferences				
Date	Time	Duration	Type	Subject
13-Jun-2017	1:24 PM	0:46	Audio+Web	John's Conference
18-Jun-2017	12:22 PM	0:14	Audio+Web	Escalation Stand-Up
<a href="#">Enter Room</a>   <a href="#">Invitee List</a>   <a href="#">Follow Up Now</a>   <a href="#">Follow Up Later</a>   <a href="#">Delete...</a>				

This section displays:

Item	Description
<b>Conference Data</b>	
Date	The conference date.
Time	The conference start time. A globe icon (  ) indicates that the conference was not scheduled relative to your default time zone. Hold the pointer over the globe to display a tooltip with the time zone details.
Duration	The actual conference duration.
Type	The conference type — Audio, Web, or Audio+Web.
Subject	The conference subject.
<b>Controls</b>	
Enter Room	Launches the selected conference room (for conferences with a web component).
Invitee List	Displays a list of conference invitees.
Follow Up Now	Starts a follow-up conference based on the selected conference; requires that the host's CoS is set to Allow Ad-Hoc.
Follow Up Later	Schedules a follow-up conference based on the selected conference; requires that the host's CoS is set to Allow Reservations.
Delete	Deletes the selected conference.

## Entering a Saved Conference Room

As the host, you can go back to any of your saved web conference rooms to review any saved materials from the conference. You can also re-set the conference room as necessary to prepare for a follow-up conference (see "[Hosting a Follow-up Conference](#)" below).

To enter a saved conference room:

**Step 1.** From the **My Conferences** page, click the **Saved Conferences** tab.

**Step 2.** Select a conference and click **Enter Room**.

The conference room launches. You can prepare the conference room as necessary by adding documents, images, notes, polls, etc.

**Step 3.** Close the conference room window to save your changes.

## Hosting a Follow-up Conference

You can use saved conferences as a starting point for follow-up conferences, re-using the setup information and any saved resources. Saved conference rooms are especially ideal for hosting ad-hoc web conferences since your conference materials can already be saved in the room and you can start immediately.

To start a follow-up conference:

**Step 1.** From the **My Conferences** page, click the **Saved Conferences** tab.

**Step 2.** Select a saved conference and then click **Follow Up Now** or **Follow Up Later**.

The Follow Up Conference box appears as appropriate.



**Step 3.** Select a **Conference Room** option:

Option	Description
Use same room	Re-uses the saved conference, preserving conference setup information (conference type and record setting, password and account code, participant list, etc.) and any saved items in a web conference room. This is the default setting.
Use copy of room	For conferences with a web component, this option creates a conference in a copy of the saved conference room (as with <b>Use same room</b> ). However, you can enter the conference and save changes to it without affecting the original saved conference.
Use a new room	For conferences with a web component, this option uses the conference setup information from the saved conference, but creates an empty conference room without any previously saved items.

**Step 4.** Click **Next**:

- If you clicked **Follow Up Now**, the **Conference Now wizard** appears; change the setup information as necessary and click **Finish** to begin the conference.  
See "[Starting an Ad-Hoc Conference by Web](#)" on page 56 for details.
- If you clicked **Follow Up Later**, the **Conference Later wizard** appears; change the setup information as necessary and click **Finish** to schedule the conference.  
See "[Scheduling Conferences with ConferenceManager](#)" on page 32 for details. Email invitations are sent to invitees and the follow-up conference appears as a scheduled conference on your **My Conferences** page.

## Deleting a Saved Conference

You can delete a saved conference (and any saved items within conferences with a web component) at any time to free disk space. Once a conference is deleted, it cannot be recovered.

To delete a saved conference:

- Step 1.** From the **My Conferences** page, click the **Saved Conferences** tab.
- Step 2.** Select a conference and click **Delete**.
- Step 3.** Click **OK**.



# Appendix A: Time Zone Expressions

ConferenceManager recognizes the following list of time zone expressions. *Note that, as of ConferenceManager version 12.0, these expressions reference UTC instead of GMT.*

- (UTC-12:00) International Date Line West
- (UTC-11:00) Coordinated Universal Time-11
- (UTC-10:00) Aleutian Islands
- (UTC-10:00) Hawaii
- (UTC-09:30) Marquesas Islands
- (UTC-09:00) Alaska
- (UTC-09:00) Coordinated Universal Time-09
- (UTC-08:00) Pacific Time (US & Canada)
- (UTC-08:00) Baja California
- (UTC-08:00) Coordinated Universal Time-08
- (UTC-07:00) Mountain Time (US & Canada)
- (UTC-07:00) Chihuahua, La Paz, Mazatlan
- (UTC-07:00) Arizona
- (UTC-06:00) Saskatchewan
- (UTC-06:00) Central America
- (UTC-06:00) Central Time (US & Canada)
- (UTC-06:00) Guadalajara, Mexico City, Monterrey
- (UTC-06:00) Easter Island
- (UTC-05:00) Havana
- (UTC-05:00) Eastern Time (US & Canada)
- (UTC-05:00) Chetumal
- (UTC-05:00) Haiti
- (UTC-05:00) Bogota, Lima, Quito, Rio Branco
- (UTC-05:00) Indiana (East)
- (UTC-04:00) Atlantic Time (Canada)

(UTC-04:00) Cuba  
(UTC-04:00) Santiago  
(UTC-04:00) Asuncion  
(UTC-04:00) Georgetown, La Paz, Manaus, San Juan  
(UTC-04:00) Turks and Caicos  
(UTC-04:00) Caracas  
(UTC-03:30) Newfoundland  
(UTC-03:00) City of Buenos Aires  
(UTC-03:00) Salvador  
(UTC-03:00) Brasilia  
(UTC-03:00) Greenland  
(UTC-03:00) Montevideo  
(UTC-03:00) Cayenne, Fortaleza  
(UTC-03:00) Saint Pierre and Miquelon  
(UTC-03:00) Araguaina  
(UTC-02:00) Mid-Atlantic - Old  
(UTC-02:00) Coordinated Universal Time-02  
(UTC-01:00) Azores  
(UTC-01:00) Cabo Verde Is.  
(UTC+00:00) Dublin, Edinburgh, Lisbon, London  
(UTC+00:00) Monrovia, Reykjavik  
(UTC+00:00) Casablanca  
(UTC) Coordinated Universal Time  
(UTC+01:00) Belgrade, Bratislava, Budapest, Ljubljana, Prague  
(UTC+01:00) Sarajevo, Skopje, Warsaw, Zagreb  
(UTC+01:00) Windhoek  
(UTC+01:00) Brussels, Copenhagen, Madrid, Paris  
(UTC+01:00) West Central Africa  
(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna  
(UTC+02:00) Chisinau  
(UTC+02:00) Cairo  
(UTC+02:00) Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius  
(UTC+02:00) Athens, Bucharest  
(UTC+02:00) Jerusalem  
(UTC+02:00) Amman  
(UTC+02:00) Kaliningrad

(UTC+02:00) Tripoli  
(UTC+02:00) Beirut  
(UTC+02:00) Harare, Pretoria  
(UTC+02:00) Damascus  
(UTC+02:00) Gaza, Hebron  
(UTC+03:00) Kuwait, Riyadh  
(UTC+03:00) Baghdad  
(UTC+03:00) Minsk  
(UTC+03:00) Nairobi  
(UTC+03:00) Moscow, St. Petersburg, Volgograd  
(UTC+03:00) Istanbul  
(UTC+03:30) Tehran  
(UTC+04:00) Abu Dhabi, Muscat  
(UTC+04:00) Astrakhan, Ulyanovsk  
(UTC+04:00) Baku  
(UTC+04:00) Yerevan  
(UTC+04:00) Tbilisi  
(UTC+04:00) Port Louis  
(UTC+04:00) Izhevsk, Samara  
(UTC+04:30) Kabul  
(UTC+05:00) Ekaterinburg  
(UTC+05:00) Islamabad, Karachi  
(UTC+05:00) Ashgabat, Tashkent  
(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi  
(UTC+05:30) Sri Jayawardenepura  
(UTC+05:45) Kathmandu  
(UTC+06:00) Dhaka  
(UTC+06:00) Astana  
(UTC+06:00) Omsk  
(UTC+06:30) Yangon (Rangoon)  
(UTC+07:00) Barnaul, Gorno-Altaysk  
(UTC+07:00) Novosibirsk  
(UTC+07:00) Krasnoyarsk  
(UTC+07:00) Bangkok, Hanoi, Jakarta  
(UTC+07:00) Tomsk  
(UTC+07:00) Hovd

(UTC+08:00) Beijing, Chongqing, Hong Kong, Urumqi  
(UTC+08:00) Irkutsk  
(UTC+08:00) Kuala Lumpur, Singapore  
(UTC+08:00) Taipei  
(UTC+08:00) Ulaanbaatar  
(UTC+08:00) Perth  
(UTC+08:30) Pyongyang  
(UTC+08:45) Eucla  
(UTC+09:00) Seoul  
(UTC+09:00) Osaka, Sapporo, Tokyo  
(UTC+09:00) Chita  
(UTC+09:00) Yakutsk  
(UTC+09:30) Darwin  
(UTC+09:30) Adelaide  
(UTC+10:00) Canberra, Melbourne, Sydney  
(UTC+10:00) Brisbane  
(UTC+10:00) Hobart  
(UTC+10:00) Vladivostok  
(UTC+10:00) Guam, Port Moresby  
(UTC+10:30) Lord Howe Island  
(UTC+11:00) Bougainville Island  
(UTC+11:00) Solomon Is., New Caledonia  
(UTC+11:00) Magadan  
(UTC+11:00) Norfolk Island  
(UTC+11:00) Chokurdakh  
(UTC+11:00) Sakhalin  
(UTC+12:00) Fiji  
(UTC+12:00) Petropavlovsk-Kamchatsky - Old  
(UTC+12:00) Auckland, Wellington  
(UTC+12:00) Anadyr, Petropavlovsk-Kamchatsky  
(UTC+12:00) Coordinated Universal Time+12  
(UTC+12:45) Chatham Islands  
(UTC+13:00) Samoa  
(UTC+13:00) Nuku'alofa  
(UTC+14:00) Kiritimati Island

# Appendix B: Quick Reference Cards

- Account Setup
- Web Basics
- Conferencing by Phone
- Conference Room Setup
- Scheduling with Outlook
- Application Sharing
- Using Webcam Video

Before you start hosting ConferenceManager conferences, you should log in to test your computer's configuration, verify your account information, and adjust your conference preferences if necessary. Your system administrator must provide you with the **conferencing system URL**, your **Conference ID**, and your **PIN**.

## Running the System Test

**Step 1.** Open a browser and navigate to the conferencing system URL.

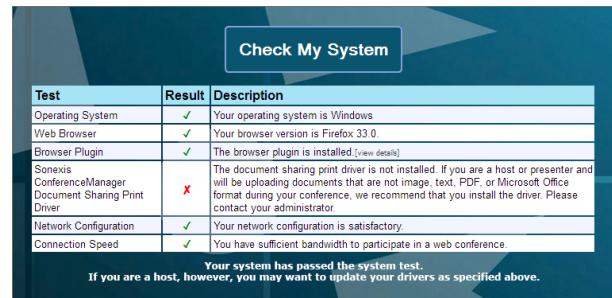
**Step 2.** Click **Run System Test**.

If a security warning appears, click **Yes**.

**Step 3.** Click **I am a host**.

**Step 4.** Click **Check My System**.

The System Test page displays the test results; any deficiencies are accompanied by an explanation and a link to correct the issue (e.g., by installing additional software).



Test	Result	Description
Operating System	✓	Your operating system is Windows
Web Browser	✓	Your browser version is Firefox 33.0
Browser Plugin	✓	The browser plugin is installed. [View details]
Sonexis ConferenceManager Document Sharing Print Driver	✗	The document sharing print driver is not installed. If you are a host or presenter and will be uploading documents that are not image, text, PDF, or Microsoft Office format during your conference, we recommend that you install the driver. Please contact your administrator.
Network Configuration	✓	Your network configuration is satisfactory.
Connection Speed	✓	You have sufficient bandwidth to participate in a web conference.

Your system has passed the system test.  
If you are a host, however, you may want to update your drivers as specified above.

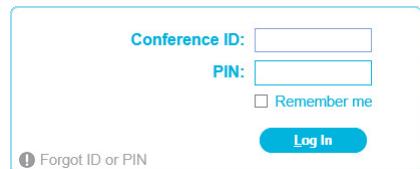
## Logging In to ConferenceManager

**Step 1.** Open a browser and navigate to the conferencing system URL.

**Step 2.** Click **I am a Host**.

**Step 3.** Enter your **Conference ID** and **PIN**.

**Step 4.** Click **Log In** to access your **My Conferences** page.



Conference ID:

PIN:

Remember me

[Forgot ID or PIN](#)

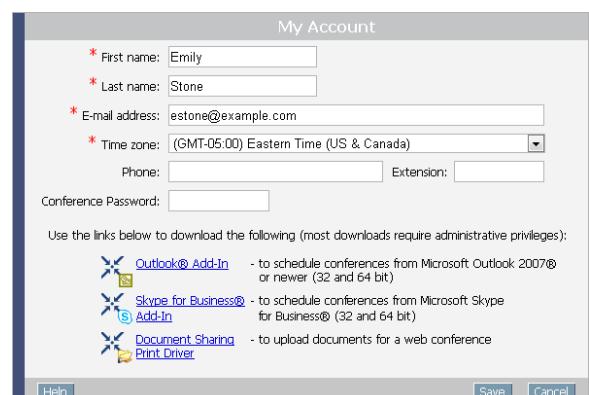
**Log In**

## Editing Your Account Information

**Step 1.** From the **My Conferences** page, click **My Account**.

**Step 2.** Edit the following fields if necessary:

Field	Description
First name, Last name	Appears in conference invitations and identifies you in web conferences.
Email address	Conference invitations are sent to this address.
Time zone	Ensures that conference reservation times are accurate for your location.
Phone, Extension	Your phone number or SIP address (optional; depending upon your Class of Service, the conferencing system may be able to dial out to you).
Conference Password	A 4- to 8-digit number that participants must enter before joining the conference. (Optional unless required by your Class of Service.)



**My Account**

\* First name:

\* Last name:

\* E-mail address:

\* Time zone:

Phone:  Extension:

Conference Password:

Use the links below to download the following (most downloads require administrative privileges):

-  [Outlook® Add-In](#) - to schedule conferences from Microsoft Outlook 2007® or newer (32 and 64 bit)
-  [Skype for Business® Add-In](#) - to schedule conferences from Microsoft Skype for Business® (32 and 64 bit)
-  [Document Sharing Print Driver](#) - to upload documents for a web conference

[Help](#) [Save](#) [Cancel](#)

**Step 3.** Install optional components if necessary (e.g., if you did not install needed components during the System Test).

Component	Description
Outlook Add-In	Integrates the conferencing system with the Outlook Calendar and Address Book.
Document Sharing Print Driver	Allows you to upload documents to web conferences.
Skype for Business Add-In	Allows you to create ad-hoc audio conferences via Skype.

**Step 4.** Click **Save**.

# Account Setup

## Setting Your Host Preferences

From your My Conferences page click **My Preferences**, make changes as necessary, and click **Save**. Note that many options require particular conferencing system licenses or Class of Service settings; see your system administrator if you have questions regarding the options available to you.

Setting	Options		
<b>Participant Preferences</b>			
Participant security level	Allow participants to join conferences with your Conference ID only, or [optionally] require participants to enter an assigned PIN as well.		
Participant waiting room	Allow participants entering the conference before you to speak to each another, or place them on hold until you join.		
Participant announcement method	Indicate participants' entering or leaving with a tone, a recorded name, or not at all.		
Allow Participant Dialouts	If enabled, allows the conferencing system to dial out to conference participants.		
<b>Conference Preferences</b>			
Ad-Hoc conferences	Allow participants to begin ad-hoc conferences without you, or require them to wait until you join.		
Audio Entry Options	Determines whether the system prompts callers to determine if they are the host, assumes all callers are participants, or whether the first caller is automatically made the host.		
When I'm not present in the conference	Let conferences run until the scheduled end time, for a specified period of time, or as long as ports are available.		
When the conf. ends	Save or Delete the conference room after the conference ends.		
When the conf. starts	Start the conference in normal mode or lecture mode, in which participants are muted as soon as they join.		
When in lecture mode	Determines whether participants can mute/unmute themselves.		
Blast Dial startup opt.	For licensed systems, determines when and how the conferencing system will Blast Dial conference participants.		
Back-to-Back Mtg. opt.	Determines which connections, if any, are automatically transferred from one meeting into the next.		
When there's only one audio connection	Determines if music plays when there is only one person in the conference.		
Record audio when the conference starts	Determines if conference recording (if licensed/enabled) begins automatically when the conference starts.		
Send Conference Report email to host	Sends a post conference report with attendee names, numbers, and connection details.		
<b>Host Preferences</b>			
Include phone numbers of type	Select the number types to include by default.	Prompt Operator for PIN	When selected, a PIN is required before connecting to the Operator Conference
Web Conference options	Select whether web participants may use conference room features.	Display Fellow Operator Mtgs.	When selected, the Live Conferences tab automatically displays Operator Conferences
Anyone can	Select whether web participants may upload/annotate documents.	Auto Display All Live Mtgs.	When selected, conference panels for all live conferences are automatically displayed
Tab options	Select whether web conference participants are able to switch and share tabs.	Operator Joining Conference Muted	When selected, the Operator is always muted upon joining a conference.
Sort participants	Select the default order in which the Who Is Here panel lists participants.	Allow Operator Join Empty Conf.	When selected, the operator may join your conference even if empty.
Host Dialout Options	Specifies when the conferencing system should dial out to the host, and if a PIN is required		
Private Conf. Names	Click any of the buttons to predefine private conference names.		
Participant DTMF...	Determines whether audio conference participants may press #1 to access private conferences.		

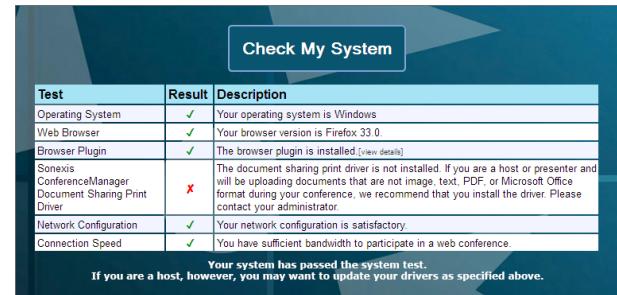
Application sharing lets you share your PC desktop and applications with other conference participants. Participants initially see a full-screen view of your desktop or application in the presentation area of their conference rooms. Thereafter, participants see everything you do as it happens — including pointer movements, scrolling, and typing. You can also grant a participant control of your PC, or vice-versa.

## Running the System Test

Both Hosts and Participants (if their desktops will be shared) should run the System Test utility to ensure that any system requirements are met.

- Step 1. Open a browser and navigate to the conferencing system URL.
- Step 2. Click **Run System Test**.  
If a security warning appears, click **Yes**.
- Step 3. Click **I am a host** or **I am a participant**, as appropriate.
- Step 4. Click **Check My System**.

The System Test page displays test results; any deficiencies are accompanied by an explanation and a link to correct the issue. Note that the Browser Plugin is required for application sharing.



Test	Result	Description
Operating System	✓	Your operating system is Windows
Web Browser	✓	Your browser version is Firefox 33.0
Browser Plugin	✓	The browser plugin is installed. <a href="#">[View details]</a>
Sonexis ConferenceManager Document Sharing Print Driver	✗	The document sharing print driver is not installed. If you are a host or presenter and will be uploading documents that are not image, text, PDF, or Microsoft Office format during your conference, we recommend that you install the driver. Please contact your administrator.
Network Configuration	✓	Your network configuration is satisfactory.
Connection Speed	✓	You have sufficient bandwidth to participate in a web conference.

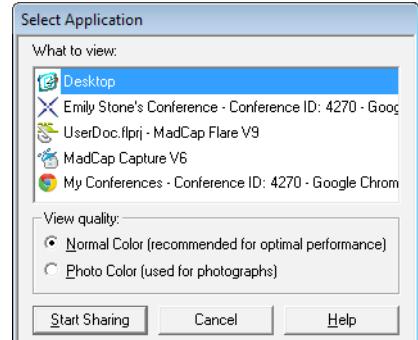
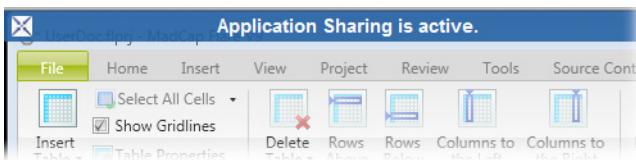
If you are a host, however, you may want to update your drivers as specified above.

## Starting Application Sharing

The host or conference leader can start application sharing from the Application Sharing panel of the conference room, and then choose whether to share an application, share the Desktop, or choose another participant to act as the presenter.

- ❖ To immediately start sharing your Desktop, click the  **Start** button.
- ❖ To share an application, click the right side of the  **Start** button and select **My Applications**; then select an application to share and click **Start Sharing**.

If you have multiple monitors, you can also select a different monitor from the list.



**Tip:** Sharing applications and maintaining a real-time view for conference participants requires a great deal of bandwidth. If you experience performance issues, try setting your display to a lower resolution.

## Application Sharing vs. Desktop Sharing

Application sharing behaves somewhat differently than Desktop sharing:

- ❖ When you allow a participant to control an application, that participant has control of that application only. When you allow a participant to control your Desktop, however, you are essentially transferring complete control of your PC — the participant can change system settings, access network resources, and run applications as if sitting at your desk.
- ❖ Applications remain shared only while open and active. Minimizing or closing the application, or changing focus to another window pauses application sharing. Your Desktop remains shared until you take control and pause or stop sharing.

In either case, the Application Sharing icon  appears in the Windows system tray to indicate that sharing is being used; hold your pointer over the icon to display a tool tip identifying the shared application or Desktop and if sharing is active or paused.

## Taking Control of a Participant's Computer

- Step 1. Click the arrow on the right side of the  button in the Application Sharing panel and select **Participant's Desktop**. (Participants must have the Browser Plugin installed.)
- Step 2. Have the participant right-click the  icon in the system tray or the Application Sharing banner, select **Share Control With**, and select your name.



- Step 3. Click your mouse to gain control of the participant's PC.

You and the participant can exchange control with each other at any time by clicking the mouse.

## Switching Applications

- Step 1. Right-click the  icon and select **Select Application**.
- Step 2. Select a new application to share and click **Resume Sharing**.

## Pausing/Resuming or Stopping Sharing

You can pause/resume or stop application sharing in a few ways:

- ❖ Right-click the  icon or the Application Sharing banner and select **Pause/Resume Sharing** or **Stop Sharing**.
- ❖ Click the **Home** tab and then click  /  or  in the Application Sharing panel.
- ❖ From the Select Application window, click **Stop Sharing**.

You can enter a scheduled conference room before the conference and set it up by adding documents, images, notes, polls, or whiteboard drawings. If your preferences allow participants to join a conference before you arrive, you can also set the conference room Preferences to allow participants to add documents or annotations.

## Entering the Conference Room

- Step 1. Log in to the conferencing system to access your My Conferences page.
- Step 2. Select a conference from the **Scheduled Conferences** section of the **Conferencing** tab.
- Step 3. Click **Set Up**. The conference room opens in a new browser window.



The screenshot shows a table titled "Scheduled Conferences" with columns: Date, Time, Duration, Recurs, Record, Audio, Web, and Subject. The table lists several entries:

Date	Time	Duration	Recurs	Record	Audio	Web	Subject
Today	1:00 PM	1:00		8	8		Weekly Staff Meeting
Today	1:00 PM	1:00		2	2		Sales Demo
20-Jul-2016	2:30 PM	1:00		4	4		Weekly Staff Meeting
22-Jul-2016	10:00 AM	1:00		20	20		Eileen's Project Review
27-Jul-2016	1:00 PM	1:00		8	8		Weekly Staff Meeting

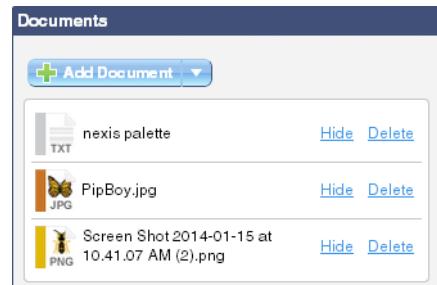
Buttons at the bottom include: July 2016, Send Update, Start, Set Up, Edit..., and End...".

## Uploading Documents

You can share any type of document by uploading it to the conference room. ConferenceManager natively supports PDF and image upload; the Browser Plugin is required for sharing Microsoft Office documents (.ppt/.pptx, .xls/.xlsx, .doc/.docx).

Other document types can be converted using the Document Sharing Print Driver, which you can install from your My Account page. To convert an unsupported document, open it in its native application and print it to the ConferenceManager printer.

- Step 1. From the Documents panel on the Home tab, click **Add Document**. To share a document you have previously converted, click the right side of the button and select **Printed Documents**.
- Step 2. Browse to and select the document you wish to upload, and then click **Open**. Uploaded documents are added to the Documents panel and automatically shared on a tab at the top of the conference room.
- Step 3. If you wish to annotate the document, click its tab and select **Annotate Slide** to display the annotation tools.



The screenshot shows a list of uploaded documents in the "Documents" panel:

- nexis palette (TXT) - Hide Delete
- PipBoy.jpg (JPG) - Hide Delete
- Screen Shot 2014-01-15 at 10.41.07 AM (2).png (PNG) - Hide Delete



The screenshot shows a document viewer with tabs: Home, Application, test.pptx, Sonexis p..., and 02-01-D... The viewer displays a presentation slide with the Sonexis logo.

Note that uploaded documents are saved with the conference room, but *document annotations are not*, so they will be lost upon closing the conference room. If you prefer to have the document unshared when the conference begins, click **Hide** on the Documents panel.

## Preparing the Whiteboard and Notepad

You can add Whiteboard annotations and Notepad contents are saved with the conference room, so you add content to them before the conference begins.

Click **Whiteboard** or **Notes** on the Tools panel to display the respective tab at the top of the conference room. Click either tab to add content.



The screenshot shows the "Tools" panel with three tabs: Whiteboard, Notes, and Q & A. The Whiteboard tab is selected.

If you prefer not to have the Whiteboard or Notepad shared when the conference begins, click **Whiteboard** or **Notes**, respectively, to hide those tabs.

# Preparing a Conference Room

## Preparing Polls

ConferenceManager allows you to create polls that present a question and multiple answers for voting. Results are tabulated as participants vote; all votes are anonymous. Both polls and poll results are saved with the conference room.

The Polls panel on the Home tab contains the Add Poll button and displays any existing polls. You can hide/show, edit, and delete polls from the Polls panel. To add a poll:

Step 1. Click **Add Poll** on the Polls panel to display the Add New Poll pop-up.

Step 2. Enter a Question.

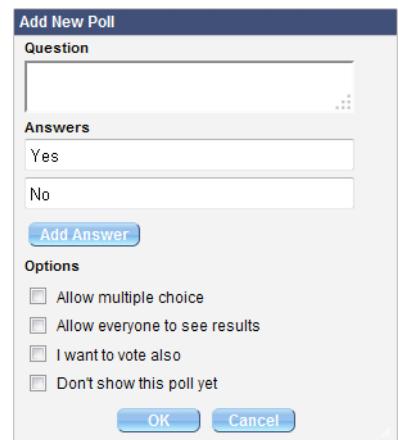
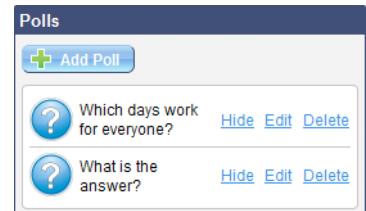
Step 3. Customize the Answers as necessary.

The default answers are **Yes** and **No**; you can edit those fields and click **Add Answer** to add additional answers (up to 10 total).

Step 4. Select the Options to use for this poll.

Option	Description
Allow Multiple Choice	Allows voters to select multiple answers (using check boxes instead of the default radio buttons).
Allow everyone to see results	Allows everyone to see the results as they are tabulated. If not selected, voters see "Your vote has been submitted" and the host can choose when to share the results.
I want to vote also	Allows you (the host) to vote in the poll.
Don't show this poll yet	The poll appears in the Polls tab but is not shared.

Step 5. Click **OK**.



## Using the Annotation Tools

The annotation tools are used to draw on the Whiteboard or to annotate shared documents.

Task	Procedure
<b>Freehand</b>	
Drawing freehand	Click  to select a line color, click , and hold the mouse button down to draw.
Erasing freehand	Click  and hold the mouse button down to erase.
<b>Objects</b>	
Drawing objects	Click  to select a line color, choose a shape (  ) , and then click/drag the mouse to create the shape.
Moving objects	Click  and then click/drag the object to a new position.
Resizing objects	Click , click the object, and then click/drag a handle to resize the object.
Deleting objects	Click , click the object, and then press the Del key or click .
<b>Text</b>	
Typing text	Click  to select a color, click  /  to adjust the size, click  and then click/type where you want the text.
Moving text	Click , click the text you wish to move, and then click/drag a handle to move the text.
Editing text	Click , double-click the text, select the characters to edit and then edit the text or format with  or  / .
Deleting text	Click , click the object, and then press the Del key or click .

If you use Microsoft Outlook, you can install an add-in that allows you to schedule ConferenceManager conferences directly through Outlook — you can access your Outlook address book, invite participants (and check participant availability), and book recurring conferences just as you would with any other meeting. Also, you can use Outlook's Delegates feature to allow someone to schedule conferences on your behalf. Verify with your system administrator that your Class of Service allows Outlook Features.

If you use Outlook to schedule conferences, try to do so consistently — while scheduling activities in Outlook are synchronized to ConferenceManager, any scheduling you do in ConferenceManager is not synchronized back to Outlook. For example, conferences scheduled in Outlook but canceled from ConferenceManager will not be removed from the Outlook calendar.

## Install the Outlook Add-In

The Microsoft Outlook add-in allows you to schedule ConferenceManager conferences from within Outlook.

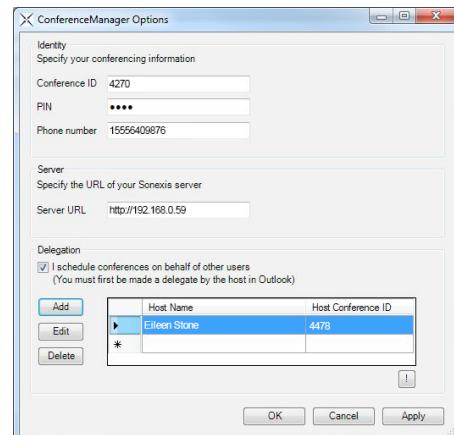
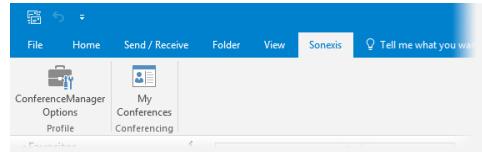
- Step 1. Close all Outlook windows and exit Outlook.
- Step 2. From the My Conferences page, click **My Account**.
- Step 3. Click **Outlook Add-In** to display the Install Outlook Add-In window.
- Step 4. Click **Run**.
- Step 5. Select your installation options and click **Install**.  
If a security warning appears, click **Yes** to continue the installation.
- Step 6. When the installation is complete, click **Close**.
- Step 7. Launch Outlook to complete the installation.

**Note:** The Outlook add-in requires Visual Studio 2010 Tools for Office Runtime and .Net framework 4.0 or higher, which your administrator may need to install.

## Configure Outlook Options

Outlook stores your Conference ID, PIN, and conferencing system URL so you can schedule conferences without authenticating.

- Step 1. In Outlook, click the **Sonexis** tab on the ribbon.
- Step 2. Click **ConferenceManager Options**.
- Step 3. Enter your **Conference ID** and **PIN**.  
**Phone number** is optional.
- Step 4. If necessary, enter the **Server URL**.  
The URL may already be present if your administrator installed the Outlook add-in on your PC
- Step 5. Click **OK** to save your changes.  
If you change any of this information within ConferenceManager, you must make the same changes in Outlook.



## Scheduling a Meeting

- Step 1. Create a new Meeting in Outlook.
- Step 2. Complete the **Appointment** and **Scheduling** tabs of the New Meeting form and invite participants as usual.
- Step 3. In the **ConferenceManager** section of the ribbon, click to select the **Audio** and/or **Web** buttons as appropriate.  
In some cases your administrator may opt to provide a single button for both. Outlook passes the necessary scheduling information to ConferenceManager and reserves the necessary ports.
- Step 4. To override your default preferences for this meeting, click **Meeting Options** and make any changes necessary (described in the following section).
- Step 5. Click **Send**.

## Modifying Conference Options

Clicking **Meeting Options** from the New Meeting form displays the Advanced Options window; make any changes necessary and click **OK** to return to the New Meeting form. Note that many options require particular conferencing system licenses or Class of Service settings; see your system administrator if you have questions regarding the options available to you.

Item	Description
Reservations	ConferenceManager automatically reserves a port for each invitee plus one for the host. If allowed, you may override that default or select <b>Reservationless Conference</b> to schedule the conference without reserving ports. Click <b>Port Availability</b> to view the number of available ports.
Include phone numbers of type	When you select contacts from Outlook, the specified work/home/mobile phone types will automatically be added to the invite list.
Record Audio	Select <b>Record Audio</b> to record the audio portion of the conference for future download or playback.
Create PINs	PINs add more security, and they allow the system to recognize participants as they enter the conference. Select this option to generate a unique PIN for each conference participant.  If your administrator allows Persistent Participant PINs, participants are assigned the same PIN for every conference for which this option is enabled. You may not be able to view participants' PINs.
Optional	If <b>Create PINs</b> is selected, selecting <b>Optional</b> allows participants to enter the conference without using their PIN.
Conference Password	To require a password for conference entry, enter a 4-8 digit number
Account Code	To assign an account code to the conference, enter 2-15 digits. Administrators may enable or even require an Account Code if they track conferencing usage for cost center billing or other purposes.
Preferences	Click <input type="button"/> to override your default preferences for this conference only; make changes as necessary and click <b>OK</b> . Preferences are described in the online help, User's Guide, and Account Setup Task Card.

## Using Delegates to Schedule Conferences

ConferenceManager's Outlook integration allows you to assign delegates (an admin or meeting planner, for example) to schedule conferences on your behalf. Both you and your delegate must configure Outlook as outlined below; see the ConferenceManager Online Help for details.

- Step 1. You (the host) must assign a delegate from your Outlook account.
- Step 2. The delegate configures your host information in their Outlook's ConferenceManager Options.
- Step 3. The delegate can then schedule a conference on your behalf by selecting a time slot on your Outlook calendar and scheduling a meeting as usual.

## Start an Audio Conference via Phone

Step 1. Call the conferencing system's dial-in number.

Step 2. If prompted, enter your Conference ID and press **#**.

Step 3. Press **1** to identify yourself as the host.

Step 4. Enter your PIN and press **#**.

- ❖ For pre-scheduled conferences, conference participants should have received an invitation with the date and time, dial-in number, your conference ID, and any conference password or PIN, if required.
- ❖ For ad-hoc conferences, you can press **\*** **1** to dial out to participants and add them.

## Phone Commands



Play the list of phone commands; press **#** **#** to return to the conference



Request customer assistance, if allowed by the administrator



Dial out to a new participant; after dialing out, you can press:

*If Blast Dial is not enabled*



Rejoin the conference with the new participant



Disconnect the new participant and rejoin the conference



Disconnect the new participant and dial another number

*If Blast Dial is Enabled*



Dial a single participant and bring them directly into the conference



Blast Dial to the invitee list



Blast Dial to My Address Book



Cancel pending dialouts



Hear Blast Dial status



Mute or unmute your line



Mute or unmute all lines except yours (lecture mode)



Play a roll call of: **1** the number of participants, or **2** participant names; also allows a user to become host if there is no host in the conference



Lock or unlock the conference; new participants cannot join a locked conference



Record a conference or system branding greeting for new participants (see *other side*)



Disconnect from the conference, allowing participants to continue talking



Disconnect all participants and end the conference



Toggle conference recording on or off, if licensed



Replay the list of phone commands



Access pre-defined private conferences (see *other side*)



Disconnects you from the current conference and allows you to enter a different Conference ID

## Private Conferencing via Phone

If your Class of Service allows Private Conferencing via DTMF, you can leave the main conference and move between pre-defined or newly created private conference rooms.

Private Conferencing commands are three-key sequences beginning with **#** **1** followed by an additional number:

- 1** ... **8**  
TUV Enter the specified private conference
- 9**  
WXYZ Create a new private conference (if there are currently fewer than eight)
- 0**  
OPER Return to the main conference

## Recording Greetings

There are two types of greetings — host greetings and system greetings. Hosts can record a greeting for a single conference, or for all conferences. If the host is also a Conference Administrator with branding permissions, the system Welcome and Blast Dial greetings can be recorded.

Press **\*** **6**  
MNO to access the greetings menu. If you have access to system greetings, you are prompted to press **1** to access host greetings or **2**  
ABC to access system greetings. If not, you go directly to host greetings.

### Host Greetings

If you do not currently have a host greeting, you are prompted to record it. Otherwise, the system describes your greeting status: single-conference, all-conference, or inactive. You may then choose one of the following options:

- 1** Listen to your greeting
- 2**  
ABC Re-record your greeting
- 3**  
DEF Use the current greeting for the current conference only
- 4**  
GHI Use the current greeting for all conferences
- 5**  
JKL Make the current greeting inactive
- 6**  
MNO Delete the current greeting
- #** **#** Return to the conference without saving changes

### System Greetings

After accessing system greetings, press **1** to record the Welcome greeting or **2**  
ABC to record the Blast Dial greeting. The following options apply to either:

- 1** Listen to the greeting
- 2**  
ABC Re-record the greeting
- 3**  
DEF Save and use the new greeting (or revert to the default greeting, if a custom greeting is currently being used)
- #** **#** Return to the conference without saving changes

## Logging In to ConferenceManager

- Step 1. Open a browser and navigate to the conferencing system URL.
- Step 2. Click **I am a Host**.
- Step 3. Enter your **Conference ID** and **PIN**.
- Step 4. Click **Log In** to access your **My Conferences** page.

Conference ID:

PIN:

Remember me

[Forgot ID or PIN](#)

**Log In**

## Starting a Conference

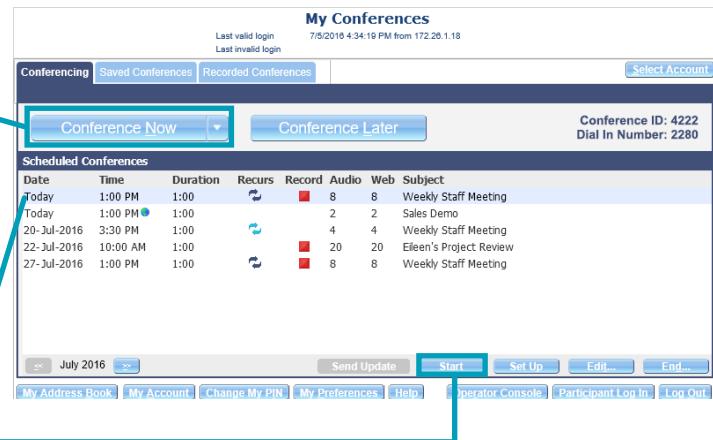
### Start an Ad-Hoc Conference

- Step 1. From the **My Conferences** page:

  - ❖ Click **Conference Now** to start a conference immediately, using the default options.
  - ❖ Click the arrow on the right side of the **Conference Now** button and select **Options**; modify options as necessary and then click **Finish** to begin the conference.

### Start a Scheduled Conference

- Step 1. From the **My Conferences** page, select a conference from the **Scheduled Conferences** section.
- Step 2. Click **Start**.



The screenshot shows the 'My Conferences' page with the 'Conferencing' tab selected. It displays a list of scheduled conferences with columns for Date, Time, Duration, Recurs, Record, Audio, Web, and Subject. A specific conference for 'Weekly Staff Meeting' on July 27, 2016, at 1:00 PM is highlighted. Below the list are buttons for 'Send Update', 'Start', 'Set Up', 'Edit...', and 'End...'. At the bottom, there are links for 'My Address Book', 'My Account', 'Change My PIN', 'My Preferences', 'Help', 'Operator Console', 'Participant Log In', and 'Log Out'.

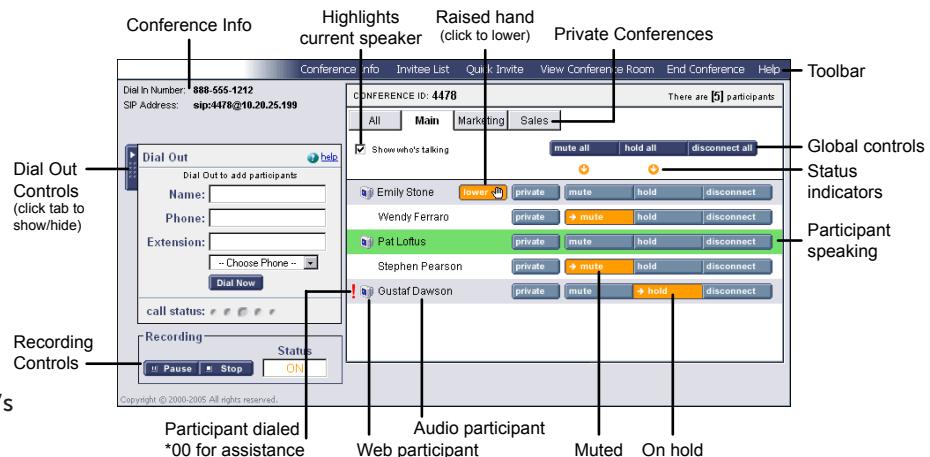
The audio console and conference room appear as appropriate for the conference type.  
See the *User's Guide* for details on the available conferencing and scheduling options.

## Dialing Out from the Audio Console

If your conference includes an audio portion, the audio console appears.

To dial out from the Audio Console:

- Step 1. If the **Dial Out** controls are not visible, click the blue tab.
- Step 2. Enter the participant's **Name** and **Phone** or SIP address, or click **Choose Phone** to select from the address book.
- Step 3. Click **Dial Now**.  
The system dials out, connects the participant, and places both of you in a private conference.
- Step 4. Click **private** next to the participant's name (and your own) to join the main conference.



The screenshot shows the 'Dial Out' section of the audio console. It includes fields for Name, Phone, Extension, and a 'Dial Now' button. To the right is a 'Recording Controls' section with 'Pause' and 'Stop' buttons. The main area displays a list of participants with their names, status (e.g., private, muted, hold), and control buttons (lower, mute, hold, disconnect). A toolbar at the top includes 'Conference Info', 'Invitee List', 'Quick Invite', 'View Conference Room', 'End Conference', and 'Help'. Global controls on the right include 'Toolbar', 'Status indicators', and 'Participant speaking'. A copyright notice at the bottom reads 'Copyright © 2000-2005 All rights reserved.'

# Web Conferencing Basics

## Using the Conference Room

### Conference Information

The screenshot shows the 'Emily Stone's Conference' panel with tabs for Home, Application Sharing, Whiteboard, and Polls. It displays the conference title, date (1/30/2014), time (10:00 AM), Conference ID (4270), and Dial In Number (19785559000). Buttons for Preferences, View Audio Conference, and End Conference are visible.

The upper-left corner of the conference room lets you view the conference title and details, as well as:

- ❖ Access shared conference room resources (tabs)
- ❖ Set preferences (features, permissions, name order)
- ❖ Add audio to a web-only conference (+) or view the audio console for an existing audio conference (☎)
- ❖ End the conference

### Conference Recording

This panel controls synchronized audio+web conference recording.

The screenshot shows the 'Conference Recording (Stopped)' panel with 'Record' and 'Stop' buttons.

### Application Sharing

This panel lets you share your Desktop, a single application, or a participant's Desktop. Also see the *Application Sharing* card.

The screenshot shows the 'Application Sharing (Stopped)' panel with 'Start', 'Pause', and 'Stop' buttons, and a list of available desktops: My Desktop, My Applications, Catherine Haase's Desktop, and Wendy Ferraro's Desktop.

### Documents

This panel lets you upload documents to the conference room and share them. Each document has its own tab and can be annotated.

The screenshot shows the 'Documents' panel with an 'Add Document' button and two files listed: 'services.png' (PNG) and 'AddinChanges' (DOC).

### Tools

This panel lets you share conference room resources:

- ❖ A Whiteboard tab for basic drawing and annotations
- ❖ A Notes tab for keeping plain text meeting notes
- ❖ A Q&A tab for conducting interactive, written question-and-answer sessions with participants

The screenshot shows the 'Tools' panel with tabs for Whiteboard, Notes, and Q & A.

### Who Is Here

The screenshot shows the 'Who Is Here (5)' panel. It lists participants: Pat Loftus, Emily Stone (YOU), Wendy Ferraro, Gustaf Dawson, and Catherine Haase. Icons indicate their status: phone, video, raised hand, audio, and quick invite. Buttons for 'Next', 'Voting', and 'Clear' are also present.

This panel is your principal means of managing and interacting with participants:

- ❖ View the invitee list and invite additional participants
- ❖ View current participant status — identify raised hands (and queue order), quick vote status, audio/web connections, and conference leadership
- ❖ Acknowledge raised hands and advance the queue
- ❖ Take quick votes (you may also vote) and view results

### Webcams

The screenshot shows the 'Webcams' panel with buttons for Publish Webcam, Flash settings, View full-screen, Lock/unlock conference, and Toggle single-cam/multi-cam view.

The Webcams panel can display your video stream and up to four participant streams.

The screenshot shows the 'Polls' panel with an 'Add Poll' button and a poll titled 'Which days work for everyone?'. It lists three options: 1. M-W, 2. T-Th, and 3. W-F.

The screenshot shows the poll results for 'Which days work for everyone?'. The results are: 1 M-W (1 vote(s), 50 %), 2 T-Th (1 vote(s), 50 %), and 3 W-F (0 vote(s), 0 %). Total Votes: 2 Average: 1.5.

### Polls

This panel lets you add interactive polls and tally the results.



# Index

## - A -

account, updating 17  
ad-hoc conferences  
    about 54  
    starting via phone 54  
    starting via web 56  
add-ins  
    installing 7  
adding  
    contacts to address book 25  
    participants to conference 33  
address book  
    adding contacts 26  
    copying contacts 25  
    deleting contacts 29  
    editing 29  
    importing contacts 27  
    opening 25  
    using 25  
annotating  
    drawing freehand 104  
    drawing objects 105  
    enabling for participants 111  
    shared documents 104  
    using text 105  
    whiteboard 104  
announcement method 20  
application sharing  
    about 106

granting and regaining control 108  
pausing and resuming 109  
selecting new applications 110  
starting 107  
stopping 110  
audio conferences  
    console 69  
    host commands 66  
    joining (host) 52  
    private 80  
    recording 81, 122  
    starting 52  
    starting ad-hoc 54  
audio console  
    about 69  
    controls 77  
    dialing out 72  
    managing participants 77  
    private conferences 80  
    viewing from conference room 84

## - B -

Basics page 32  
Blast Dial 75  
    phone commands 66  
    preferences 22  
    priority 119

## - C -

cancelling scheduled conferences 50

- Chat panel 95
- conference ID, recovering 4
- Conference Later wizard 32
- Conference Now wizard 56
- conference room
  - about (host) 84
  - deleting saved 127
  - displaying audio console 84
  - ending conferences 62, 84
  - entering saved 126
  - managing saved 125
  - monitoring participants 89
  - notes 111
  - pre-setting 48
  - saved 15
  - saving 124
  - using for follow-up 126
  - whiteboard 111
- conferences
  - ad-hoc 54
  - audio console 69
  - audio, controlling by phone 66
  - cancelling via Outlook 50
  - cancelling via web 50
  - chatting in 95
  - deleting recordings of 123
  - deleting saved rooms 127
  - dialing out from 72
  - downloading recorded audio 122
  - editing 49
  - ending or leaving 61
  - ending via conference room 62, 84
  - ending via My Conferences 63
  - ending via phone 61
  - entering saved rooms 126
  - follow-up 126
  - in progress 60
  - invitations 47
  - leaving via phone 61
  - leaving via web 62
  - managing audio 77
- managing recorded 16
- managing saved 125
- managing scheduled 13
- managing web participants 91
- modifying 49
- port availability 38
- pre-setting conference rooms 48
- preferences 20
- private 80
- recording audio 81, 122
- recurring 36
- rejoining 64
- saved rooms, about 124
- scheduling 32
- scheduling options 35
- scheduling via Outlook 41
- sharing applications 106
- starting ad-hoc 56
- starting automatically 53
- starting scheduled 52
- starting via phone 52
- starting via web 52
- transferring leadership 101
- using conference room 111
- without participants 63
- console, audio 69
- contacts
  - adding 25
  - adding manually 26
  - copying 25
  - deleting 29
  - editing 29
  - importing 27
- CSV files, for contacts 27

- D -

- delegated accounts
  - creating 117
  - modifying 117
- delegated host
- delegate's view 115

- delegates
  - acting on behalf of a host 115
  - creating accounts 117
  - modifying accounts 117
  - selecting host accounts 114
  - viewing host account 115
- deleting
  - conference recordings 123
  - contacts 29
  - saved conference rooms 127
- desktop sharing 106
- dialout
  - audio console controls 72
  - Blast Dial 75
  - from audio console 72
  - screened 73
- document sharing
  - about 102
  - annotating documents 104
  - converting documents 103
  - enabling for participants 102
  - troubleshooting 103
  - uploading documents 102
  - viewing and annotating 104
- documentation 8
  - quick reference 133
- documents
  - annotating 104
  - converting before upload 103
  - uploading 102
  - viewing and annotating 104
- drawing
  - freehand 104
  - objects 105
  - using text 105
- E -
  - editing
    - account information 17
    - conferences in progress 60
    - contacts 29
- scheduled conferences 49
  - ending
    - conferences via conference room 84
    - conferences via My Conferences 63
- F -
  - follow-up conferences 126
- G -
  - guides (documentation) 8
- H -
  - hands
    - recognizing in audio conference 77
    - recognizing in web conference 94
  - help, online 8
  - hosts
    - delegate accounts 114
    - logging in 3
    - preferences 22
    - setting preferences 19
- I -
  - importing contacts 27
  - installing
    - optional components 7, 17
  - invitations
    - about 47
  - invitee list
    - viewing via conference room 90
- J -
  - joining conferences
    - as host 52
    - via automatic dialout 53
- L -
  - leadership
    - granting 101

- leaving
  - conferences via conference room 62
  - conferences via phone 61
- logging in
  - about 2
  - as host 3
  - lost password 4
- M -
- managing
  - participants via audio console 77
  - recorded conferences 122
  - saved conferences 15
- Microsoft Outlook See Outlook
- modifying scheduled conferences 49
- My Account page 17
- My Conferences
  - about 10
  - Recorded Conferences 16
  - Saved Conferences 15
  - Scheduled Conferences 13
- My Preferences page 19
- N -
- notes, taking 111
- O -
- online help 8
- Operator Console
  - preferences 23
- options
  - Add documents 102
  - Outlook 39
  - Use annotation tools 111
  - Who Is Here order 89
- Options page 35
- Outlook
  - canceling conferences 50
  - configuring 39
  - options 39
- scheduling conferences 41
- P -
- participants
  - adding when scheduling 33
  - announcement method 20
  - chatting with 95
  - granting control to 108
  - invitations 47
  - inviting to conferences 33
  - listing in alphabetical order 89
  - managing via audio console 77
  - managing via conference room 91
  - polling 98
  - preferences 20
  - regaining control from 108
  - security level 20
  - sending quick invites 79, 90
  - taking questions 96
  - taking quick vote 94
  - transferring leadership to 101
  - waiting room 20
- Participants page 33
- password, recovering 4
- phone commands
  - ending conferences 61
  - host commands 66
  - leaving conferences 61
  - starting ad-hoc conferences 54
  - starting audio conferences 52
- PIN
  - changing 18
- plug-ins
  - installing 7
- polls
  - creating 99
  - editing 101
  - managing 98
- port availability 38
- pre-setting conference rooms 48

- preferences
    - conference 20
    - host 22
    - Operator Console 23
    - Outlook 39
    - participant 20
    - setting default 19
  - print driver
    - using to convert documents 103
  - private conferences 80
- Q -
- Q & A tab 96
  - questions
    - answering via Q & A 96
    - asking participants 94
    - creating polls 94
  - quick invites
    - sending via conference room 79, 90
  - quick reference cards 133
  - quick votes 94
- R -
- raised hands
    - in audio conference 77
    - recognizing in web 94
  - recording
    - conference audio 81, 122
    - deleting 123
    - downloading 16, 122
    - managing 122
    - web conferences 122
  - Recording 67-68
  - recurring conferences 36
  - rejoining conferences 64
  - rescheduling conferences 49
- S -
- saved conference rooms 124
- saved conferences 15
    - entering saved room 126
    - managing rooms 125
  - saving conference rooms 124
  - scheduled conferences
    - cancelling 50
    - cancelling via Outlook 50
    - managing 13
    - starting 52
  - scheduling
    - checking port availability 38
    - follow-up conferences 126
    - options 35
    - recurring conferences 36
    - via Outlook 41
    - via web 32
  - screened dial out 73
  - Select Account panel 114
  - sharing
    - applications 106
    - applications vs. desktop 106
    - documents 102
  - starting
    - ad-hoc conferences 54
    - application sharing 107
    - audio conferences 66
    - conferences automatically 53
    - web conferences 52
  - system test 5
- T -
- taking notes 111
  - task cards 133
  - testing your system 5
  - time
    - zones 129
  - troubleshooting
    - shared documents 103

**- U -**

uploading  
  documents 102  
  errors 103

**- V -**

voting  
  taking votes 94

**- W -**

waiting room 20

web conferences

  conference room 84  
  managing participants 91  
  recognizing hands 94  
  recording 122  
  starting 52

whiteboard

  annotating 104  
  using 111

Who is Here

  for host 89

wizards

  Conference Later 32  
  Conference Now 56