IPedge®

Meeting Audio, Web and Video Conferencing Moderator User Guide

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IP*edge* General End User Information

FCC Requirements

Means of Connection: The IP*edge* does not connect directly to the telephone network. All direct connections are made to a gateway. Please refer to the gateway manufacturer's documentation.

Radio Frequency Interference

Warning: This equipment generates, uses, and can radiate radio frequency energy and if not installed and used in accordance with the manufacturer’s instruction manual, may cause interference to radio communications. It has been tested and found to comply with the limits for a Class A computing device pursuant to Subpart J of Part 15 of FCC Rules, which are designed to provide reasonable protection against such interference when operated in a commercial environment. Operation of this equipment in a residential area is likely to cause interference, in which case, the user, at his/her own expense, will be required to take whatever measures may be required to correct the interference.

Underwriters Laboratory

This system is listed with Underwriters Laboratory (UL). Secondary protection is required, on any wiring from any telephone that exits the building or is subject to lightning or other electrical surges, and on DID, OPS, and Tie lines. (Additional information is provided in the IP*edge* Install Manual.)

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CP01, Issue 8, Part I Section 14.1

Notice: The Industry Canada label identifies certified equipment. This certification means that the equipment meets certain telecommunications network protective, operational and safety requirements as prescribed in the appropriate Terminal Equipment Technical Requirements document(s). The Department does not guarantee the Equipment will operate to the user’s satisfaction.

Repairs to Certified Equipment should be coordinated by a representative designated by the supplier. Any repairs or alterations made by the user to this equipment, or equipment malfunctions, may give the telecommunications company cause to request the user to disconnect the equipment.

Users should ensure for their own protection that the electrical ground connections of the power utility, telephone lines and internal metallic water pipe system, if present, are connected together. This precaution may be particularly important in rural areas.

Before installing this equipment, users should ensure that it is permissible to be connected to the facilities of the local telecommunications company. The equipment must also be installed using an acceptable method of connection. The customer should be aware that compliance with the above conditions may not prevent degradation of service in some situations.

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Contents

Introduction

This guide describes the capabilities and procedures for IP*edge* Meeting on the LUCA-2 (Linux Unified Communication Appliance). This guide can be used in conjunction with online help when using IP*edge* Meeting.

Organization

This guide is divided as follows:

- **Chapter 1 – Overview** discusses audio and web conferencing, features, logging on and using the Home page.
- **Chapter 2 – Creating Users** contains procedures on setting up users.
- **Chapter 3 – Using Conferences** contains procedures on controlling conference, adding and editing conference pages, inviting users to a conference, and on accepting the invitation.
- **Chapter 4 – Conducting Audio Conferences** describes controlling conferences using the telephone controls or by using RealView.
- **Chapter 5 – Conducting Web Conferences** contains instructions on starting a web confrerence, joining a web conference, performing a web meeting, installing Screencaster, sharing the desktop, whiteboard navigation, sharing documents, etc.
- **Chapter 6 – RealView** explains how to use RealView features to see the status of incoming callers.
- **Chapter 7 – Reports** contains information on using reporting tools and functions.
- **Chapter 8 – Managing Your Profile** contains procedures on editing the Moderator Profile page.
- **Chapter 9 – Online Help** discusses how to use the IP*edge* Meeting online help.

Important! This document may contain references to features that are for future implementation.

Conventions

Conventions	Description
Note	Elaborates specific items or references other information. Within some tables, general notes apply to the entire table and numbered notes apply to specific items.
Important!	*Calls attention to important instructions or information.*
Extension Number	Press to answer a call to the Extension Number. Each station can have multiple extension buttons. Incoming calls ring the extension button(s) from the top down. For example, station 10's extensions ring 10-1 first, then 10-2, 10-3, and 10-4. A station is considered busy when all extensions are being used. **Note** The naming convention for DKT assignments within Toshiba is Directory Numbers. For clarity and ease of understanding, the terms Extension Number and Phantom Extension Number will be used in this document in lieu of PDN and PhDN.
Arial bold	Represents telephone buttons.
Courier	Shows a computer keyboard entry or screen display.
“Type”	Indicates entry of a string of text.
“Press”	Indicates entry of a single key. For example: Type **prog** then press **Enter**.
Plus (+)	Shows a multiple PC keyboard or phone button entry. Entries without spaces between them show a simultaneous entry. Example: **Esc**+**Enter**. Entries with spaces between them show a sequential entry. Example: **#** + **5**.
Tilde (~)	Means “through.” Example: 350~640 Hz frequency range.
➤	Denotes a procedure.
➤	Denotes the step in a one-step procedure.
See Figure 10	Grey words within the printed text denote cross-references. In the electronic version of this document (Library CD-ROM), cross-references appear in blue hypertext.

Related Documents/Media

Note: Some documents listed here may appear in different versions on the Toshiba FYI site or in print. To find the most current version, check the version/date in the Publication Information on the back of the document’s title page. The following are related documents for IP*edge* Meeting.

- IP*edge* Meeting Installation and Administration Manual

Overview 1

The IP*edge* Meeting application supports audio and web conferencing.

Audio and Web Conferencing

This User Guide explains the features and procedures for the use of the audio and web conferencing applications:

The audio and web conferencing applications include the following conference types:

- Reservation-less Meet Me conference
- Reservation based Meet Me conference
- Dialed Number based conference
- Dial-out from conference
- Recurring conference

Features

The features of the **audio conference** services include:

- Self serve Moderator web portal in multiple languages (English, French, etc.)
- Web portal and phone based in-conference controls
- Distribute conference invitations using iCalendar application (supported by Microsoft Outlook, Lotus notes etc.)
- Dynamic Port allocation per conference for audio participants
- Loudest Talker display on web portal
- Conference specific entry tones
- Announce participant names
- Conference recording and replay
- Transfer participants between conferences
- Conference selectable exit tones
- Merging of conferences via web portal
- Integrated web conferencing, desktop sharing, presentation sharing and white-boarding (optional application sold separately)
- Detailed call logs via web portal
- End of session summary usage report
- Class room mode
- Analyst mode

The additional features of the **web conference** services include:

- Ability to display web conference in full screen
- Ability to select an entry and exit html page or URL
- Ability to share desktop with participants
- Ability to annotate PDF documents in a collaborative environment
- Ability to annotate whiteboard in a collaborative environment
- Ability to enable web cameras in a web conference (requires video conference license).
- Public and private chat available
- Moderator can turn annotation tools on or off

The system ships with a web-accessible, graphical user interface. A personal computer connected to the company's LAN or the Internet can be used to launch the user interface.

Logging On

1. Access the user interface through a standard web browser (Internet Explorer 8.0 or higher).
2. Type the server's IP address in your browser's URL (Universal Resource Locator) field.

The system displays the Log in page, shown below.

To manage your conferences, complete the following steps.

1. Enter the Login Name (provided by your System Administrator).
2. Enter your Passcode.
3. Select Manage Services

The system displays The Home Page which is pointed to Defined Conferences by default.

You or people you invite to a web conference can also join directly from this page. To immediately start or join a web conference, complete the following steps.

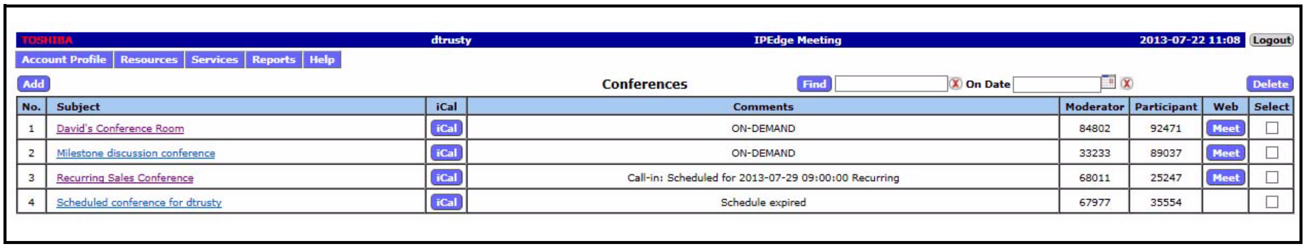
1. In the Passcode field, enter a moderator or participant access code that has been assigned to a previously created conference.
2. Select Join Web Conference.

The system displays The Web Meeting Page.

Home Page

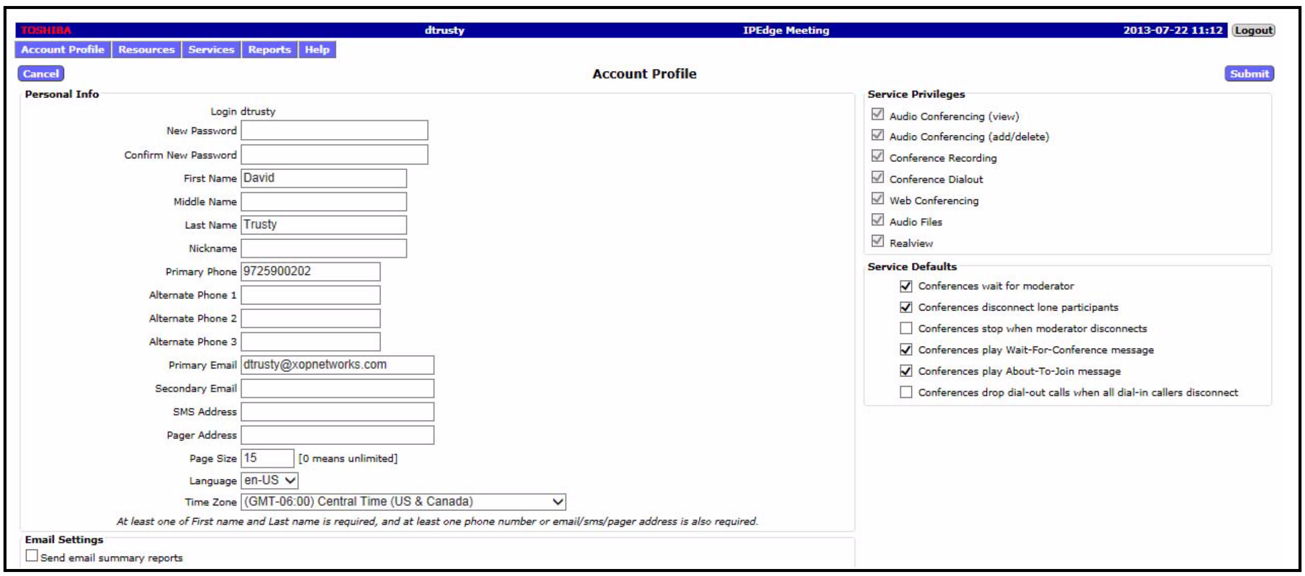
The Home page provides access to the functions for all of your licensed applications.

The Home page allows you to access the other screens, such as managing your profile and creating conferences. The home page also lists the existing conference rooms in your account.



Account Profile

This tab shows the various items associated with your moderator account. These include your contact information, service privileges associated with your account and other service defaults.



Resources Menu

This Menu shows Users, Audio Files and Schedules associated with your moderator account.

Users – Click on this tab to create users for your conference account. When a participant dials into your conference and his/her caller ID matches the number on the associated User profile then his/her name will be displayed on the RealView portal.

Audio Files – these are greetings and join messages recorded to support your conference rooms.

Schedules – these are your personal schedules (e.g., My Vacation etc) that are used to support scheduled conferences.

Services Menu

This menu shows the services associated with your Moderator account.

'Conferences' represents that your account is able to support audio and web conferencing service.

Reports Menu

The Reports Menu shows RealView web portal and service and usage reports for your conferences.

Help

The Help button provides context sensitive help.

Creating Users 2

This chapter explains how to set up your users. Creating users is useful if you want to view conference attendees by name, based on their source number.

Moderators must manually add users. The system administrator can also import users into the address book.

Working with Users

If you set up your users, the system displays the user's name on the RealView page for your active conferences.

The Defined Users Page

The Defined Users page lists any users you have previously defined.

To add users or edit user information, select Users from the Moderator Menu or the Users link on the Home page. The system displays the Defined Users page, shown below.

Add | Users | Delete

No.	Name	Select
1	Gonzales, Patrick	☐
2	Gorman, Julia	☐
3	Mabbit, Dick	☐
4	Parks, Karen	☐
5	Pattist, David	☐
6	Smith, Sandy	☐

The system displays the following information related to the users:

- A system-generated number for the user
- The name of the user, with a link to edit the user's personal information
- A check box to delete the user

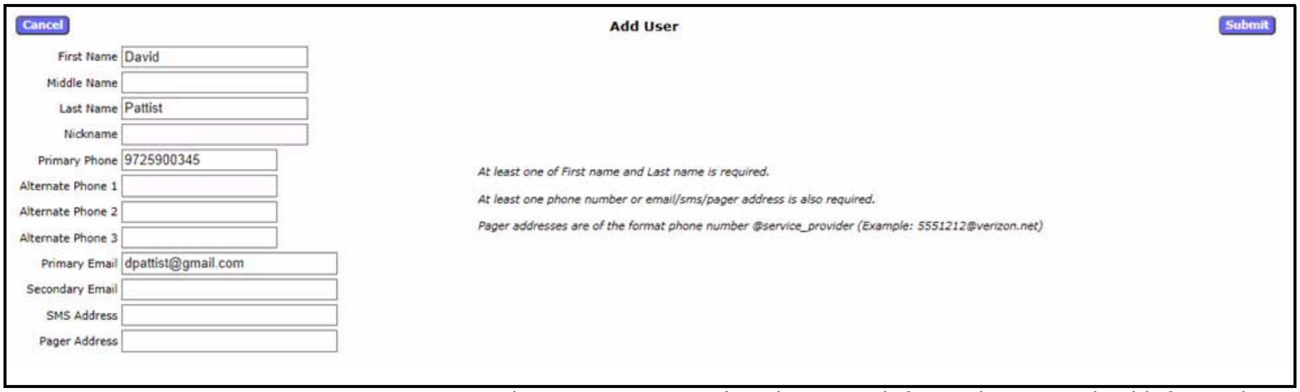
1. To add a new user, select Add to open The Add User Page.
2. To edit an existing user's information, select the highlighted user name to open The Edit User Personal Information Page for the selected user.
3. To delete an existing user, check the Delete box next to the user's name and select Delete.

The previous, next, and page numbers at the bottom allow you to navigate to different pages in the list of users.

The Add User Page

The Add User page allows you to enter user personal and contact information.

1. To open the Add User page, go to the Defined Users page and select Add. The system displays the Add User page, shown below.



2. Enter the user’s personal and contact information. Required information includes:
   - Either a first name and/or last name
   - At least one phone number or email/sms/pager address

Note: Pager addresses must follow this format: “phone_number@service_provider” (Example: 5551212@verizon.net).

3. Select Submit to save the user information or Cancel to ignore the changes and return to the Defined Users page.

Edit User Personal Information

The Edit User Personal Information page allows you to change the user's personal and contact information.

1. To open the Edit User Personal Information page, go to the Defined Users page and select the highlighted user name for the user whose information you want to change. The system displays the Edit User Personal Information page shown below.

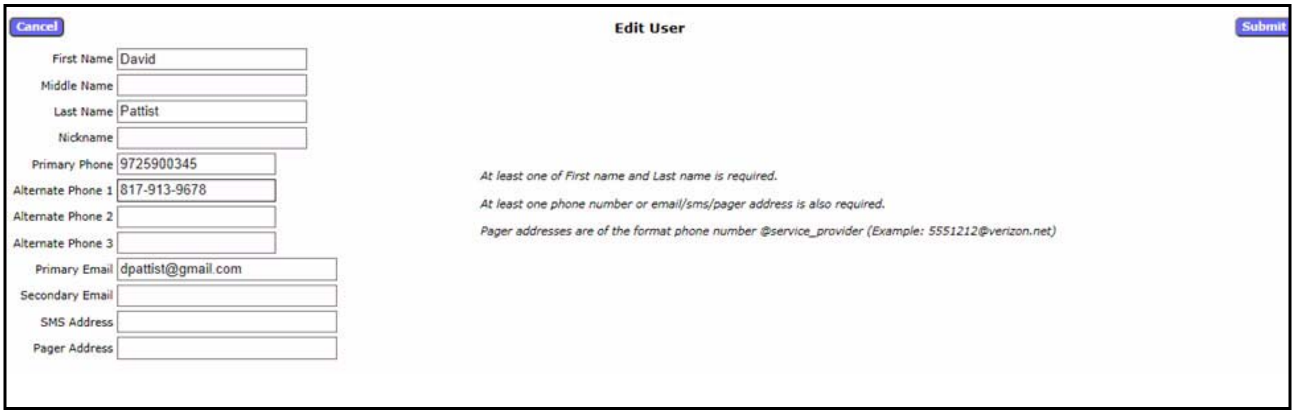


Figure 1 – The Edit User Personal Information Page

2. Edit the user's personal and contact information as needed. Required information includes:
    - Either a first name or last name
    - At least one phone number or email/sms/pager address

Note: Pager addresses must follow this format: "phone_number@service_provider" (Example: 2345551212@vtext.net).

3. Select Submit to save changes to the user information or Cancel to ignore the changes and return to the Defined Users page.

This page is intentionally left blank.

Using Conferences 3

You can control one or more conference rooms for your conferences. Conference rooms are required for audio or web conferences. This chapter explains how to set up conference rooms.

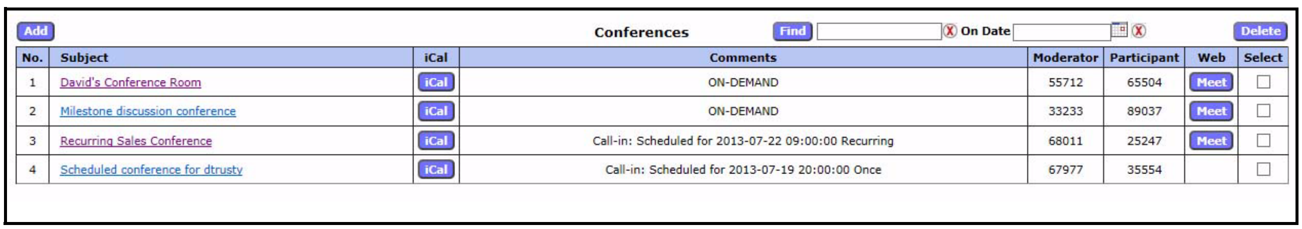
Creating a Conference

You must set up a “room” for each of your conferences before you can use audio or web conferences.

The Defined Conferences Page

The Defined Conferences page lists the conference “rooms” you have defined.

To add conference rooms, select Conferences from the Services Menu. The system displays the Defined Conferences page, shown below.



No.	Subject	iCal	Comments	Moderator	Participant	Web	Select
1	David's Conference Room	iCal	ON-DEMAND	55712	65504	Meet	☐
2	Milestone discussion conference	iCal	ON-DEMAND	33233	89037	Meet	☐
3	Recurring Sales Conference	iCal	Call-in: Scheduled for 2013-07-22 09:00:00 Recurring	68011	25247	Meet	☐
4	Scheduled conference for dtrusty	iCal	Call-in: Scheduled for 2013-07-19 20:00:00 Once	67977	35554		☐

Figure 2 – The Defined Conferences Page

The system displays the following information related to the conferences:

- A system-generated number for the conference
- The conference name with a link to edit the conference details
- A link to invite conference participants via iCal using Microsoft Outlook or other calendar application
- Conference details – On-demand or scheduled with scheduling information, including ports allocated and recurrence information
- The Moderator Access Code, which allows an external party to join the conference as a moderator
- The Participant Code, which allows an external party to join the conference as a conference participant
- A link to start the associated web conference, if applicable
- A check box to delete the conference

The system allows participants to enter a conference room based on a dialed number. When a service selection rule is applied to a Moderator’s conference room, the corresponding row is shown in Yellow color.

1. To filter the list of conferences, enter one or more characters in the field next to Find and select `Find`. The system displays any matching conferences.

2. To add a new conference, select Add to open The Add Conference Page.To edit an existing conference, select the **highlighted conference name** to open The Edit Conference Page for the selected conference.
3. To schedule and invite users iCal to open a Microsoft Outlook appointment window with the conference details already populated. The Outlook appointment will be emailed to selected invitees.

Note: It is not necessary to schedule a conference in order to invite using Outlook.

4. To start a web conference, select Meet next to the conference you want to start.
5. To delete an existing conference, check the Delete box next to the conference and select Delete.

The previous, next, and page numbers at the bottom allow you to navigate to different pages in the list of conferences.

The Add Conference Page

The *Add Conference page* allows you to set up a conference room for your conferences on behalf of a moderator. Once a room is established, you can conduct on-demand conferences or scheduled reservation-based conferences. The scheduled reservation-based conferences can be one time or set up as recurring conferences. The on-demand conferences are supported on a 'best effort' basis. The reservation-based conferences provide guaranteed audio port availability for the duration of the conference.

To open the *Add Conference page*, go to the *Defined Conferences page* and select **Add**. The system displays the *Add Conference page*, shown below.

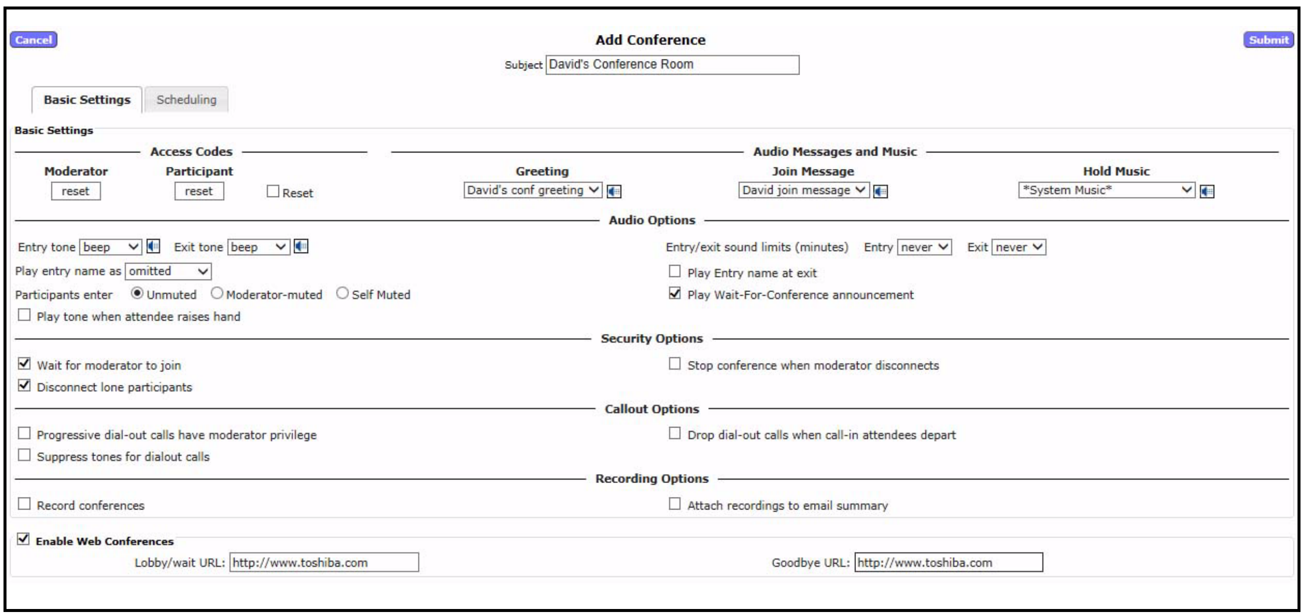


Figure 3 – The Add Conference Page

1. Enter the name of the conference room in the **Subject** field. This name will be the subject of the invitation when you invite users to the conference.

2. Set the **Audio Conference Options**.

    - You can set a **Moderator Access Code** and separate **User Access Code** or you can leave as RAND (random). The system generates random Access Codes automatically. If needed, you can change the Access Code to any easily-memorized number. Check the **Reset Access Codes** box to create new Access Codes.
    - Select an **Entry Tone**. This tone is heard by participants when new users join the audio conference.
    - Select to preview the sound.
    - Select an **Exit Tone**. This tone is heard by participants when users leave the audio conference.
    - Select one of the following options for the default setting for when **Users Enter** the conference: **Unmuted**, **Moderator-muted**, or **Self Muted.**
    - Check the **Wait for Moderator to join** box to indicate that the conference does not begin until at least one party joins the conference using the Moderator Access Code. The participants will hear music on the conference the moderator joins. If the field is not checked, users can join the conference as soon as they enter the participant Access Code.

- Check the **Stop conference when moderator disconnects** box to end the conference when the moderator disconnects.

WARNING! **Using this setting can cause problems if the moderator is using a cell phone and loses voice path due to inadvertent connection drops in the cellular network.**

- Check the **Suppress tones for dialout calls** box to keep digits pressed (i.e., 31#) from entering the conference.

Note: This option requires that the Moderator have the Conference Dialout Privilege. Please contact the System Administrator about activating this feature.

- Check the **Attach recordings to email summary** box to include the recording of the conferences in this conference room to the email summary at the end of the conference.

Note: This option requires that the Moderator have the Record Conferences Privilege. The Moderator must also set his profile to send Summary Emails for Conferencing. The System Administrator must also configure the system to send summary emails.

- Select “**wait for conference**” announcement in the Greeting to have the wait for conference to begin announcement played to each participant.
- Select “**about to join**” announcement in the Join Message to play this announcement before a user enters the conference room.
- Check the **Play tone when attendee raises hand** box to play a tone when an attendee indicates a question.
- Check the **Record conferences** box to have recording start at the beginning of the conference automatically.

Note: This option requires that the Moderator have the Record Conferences Privilege. Contact the System Administrator about activating this feature.

- Check the **Drop Dialout callers when Dialin Callers disconnect** box to automatically drop any Attendees that the moderator added to the conference by dialing out when all of the dial in callers exit the conference. This is to prevent erroneous phone charges from an outbound call that does not clear down properly.

3. If you have web conferences enabled, set the **Web Conference Options**.
   - To associate a web conference with this conference room, check the **Enable Web conference** box.
   - Indicate a different lobby or post-meeting URL for before and after the web conference in the **Lobby/wait URL** or **Goodbye URL** fields.

Schedule the Conference

1. Select **On-demand** to make the conference available at any time.
2. Select **Scheduled** to schedule a reservation-based conference. The system opens additional features depending on your selections. A sample is shown below.

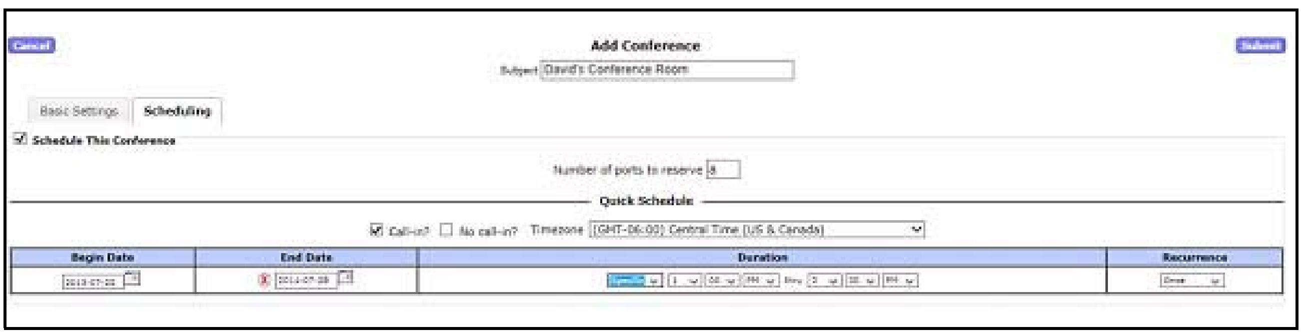


Figure 4 – The Add Conference Page Scheduling Options

3. Enter the maximum number of ports to reserve for the scheduled conference in **Maximum ports** field. Note that the bridge will not allow more participants to join the conference than the number of ports reserved.
4. Enter the **Start Date** and **Time**. Enter the **End Date** and **Time**. It is highly recommended that you provide a duration time cushion to prevent being cut off prematurely.
   - If the conference is recurring, select a **Recurrence pattern** and enter the details.
5. Select **Submit** to save the conference information or **Cancel** to ignore the changes and return to the Defined Conferences page.

The Edit Conference Page

The *Edit Conference page* allows you to edit an existing conference.

To open the Edit Conference page, go to the Conferences page and select a conference name for the conference you want to edit. The system displays the Edit Conference page, shown below.

Figure 5 – The Edit Conference Page

Inviting Users to Your Conference

The Audio and Web Conferencing Applications makes use of Microsoft's Outlook Calendaring application (or other iCal enabled application) for sending conference invitations.

When you use the web portal user interface in collaboration with Microsoft Outlook to invite users to your conference, iCal becomes populated with your conference details. To invite participants to your conference, complete the following steps.

Notes:

- It is not required to create a scheduled conference in order to use iCal and Outlook to invite users to your conference.
- These steps are explained assuming the use of Microsoft Outlook. Other iCal applications will have similar, though slightly different, steps.

1. From the *Conferences page*, shown below, select **iCal** next to the conference room you want to use.

Figure 6 – The iCal Option on the Defined Conferences Page

The system opens a *File Download dialog*, as shown below.

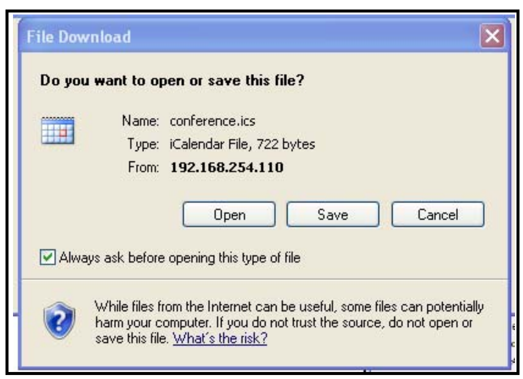


Figure 7 – File Download Dialog for Conference Invitation

2. Select **Open** to open the file in Microsoft Outlook. If you select **Save**, you can open the file in Microsoft Outlook later. Select **Cancel** to cancel the invitation and scheduling process.

The system opens an appointment in your default calendar program, as shown below.

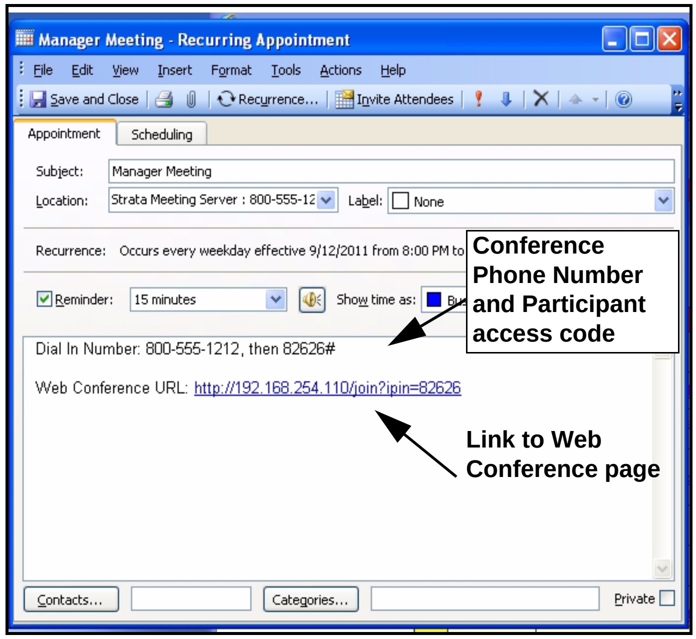


Figure 8 – Sample Microsoft Outlook Conference Appointment

The calendar entry includes the following information:

- The name of the conference room in the Subject line
- The dial in number of the main conference bridge
- The participant Access Code for the audio conference bridge and the web conference
- The scheduling and recurrence information, if applicable
- A link to the web conference page, if applicable

3. Update the appointment information or email text as necessary. You can also add attachments, such as a document you want to discuss on the conference call.

4. Select the **Invite Attendees** option, as shown below.

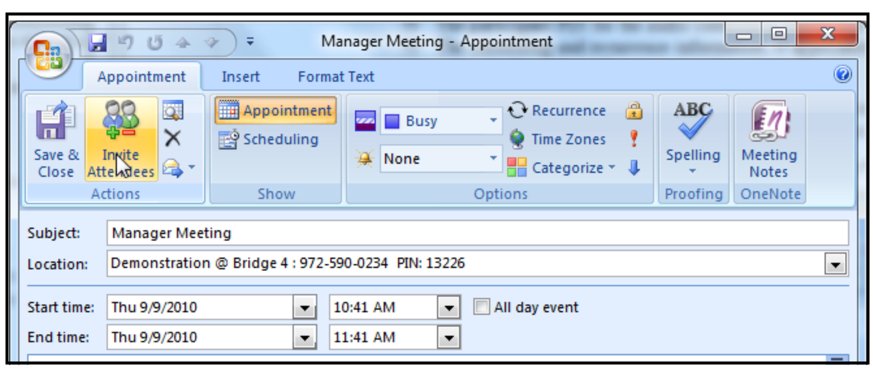


Figure 9 – Inviting Attendees using Outlook

Microsoft Outlook adds the *To* field, allowing you to enter addresses from your Outlook address book just as you would for any email message.

5. Begin typing names or email addresses. Or select **To** to use your Outlook address book to select participants to invite to the conference, as shown below. You can double-click on the names or highlight the names and select **Required**.

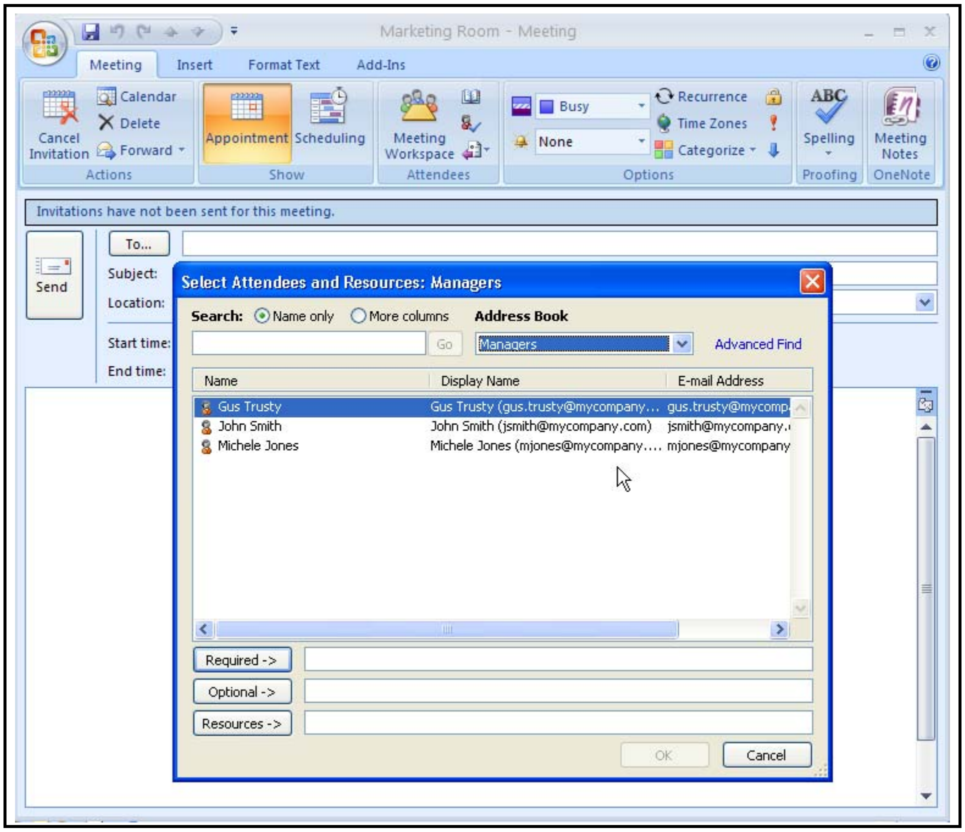


Figure 10 – Selecting Attendees for the Conference Invitation Email

6. When you have finished selecting participant's emails for the invitation, select **OK**. You can also enter email addresses that are not in your Outlook Contacts.
7. When all the participant's email addresses are listed in the **To** field, select the **Send** button. The system will send email invitations to all users.

As the users accept their invitations, the appropriate conference-related information will be posted on their calendars. By default, the reminder is set to 15 minutes before the start of the conference. Outlook will remind all potential users when the conference start time approaches.

Accepting an Invitation

When you send an invitation through Outlook, all the participants you invited will receive an email message with the conference details.

A sample is shown below.

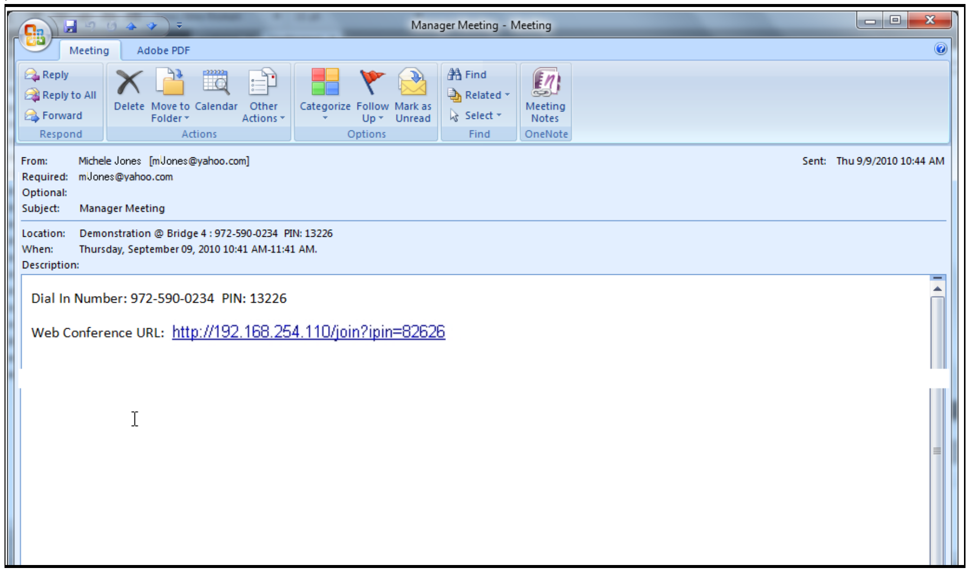


Figure 11 – Accepting an Invitation for a Conference

The participants can **Accept** or **Decline** the invitation, indicating (with a return email) to you whether they will be present at the conference or not.

When it is time for a meeting that includes a web conference, the participants can click on the link in the email to join the meeting.

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Conducting Audio Conferences 4

There are several in-conference controls to enhance your conference. You can control conferences using the phone controls or by using RealView. Refer to “Audio Conference Controls” on page 23 for a listing of in-conference controls.

Joining a Conference

You will need the phone number for the main conference bridge. Please contact your system administrator.

1. To join a conference, dial the phone number of the main conference bridge.
2. Enter your Access Code followed by **#** to enter the correct conference room. If you are the moderator, enter the moderator Access Code. If you are a participant, enter the participant Access Code. Depending on the settings, you may wait in a “lobby” until the moderator joins the conference.
3. You may hear ‘entry tones’ to indicate that other participants have joined or left the conference.
4. If necessary, you can rejoin the call by dialing the number again and re-entering your Access Code.

Adding Participants to an Existing Conference

You can add new participants during a conference call. This is a great way to add people or to call and check information with another person by “stepping out” of the conference room momentarily.

1. Using your phone pad, dial **31#**. This will give you a new dial tone.
2. Dial the number of the person you want to add to the conference, followed by #.
3. When you have made contact with the person and the participant is ready to join the conference, dial **32#**. Both you and the new user are now part of the conference call.
4. If you cannot locate the person or the participant cannot join the conference, dial **33#** to drop the call. You will return to the original conference call.

Controlling your Conferences via the telephone

This section describes some of the options available to control noise, access, and record a conference call.

Mute and Unmute

There are two forms of muting available. The first is Self Muted, which can be activated by the participant or moderator, but can only be deactivated by the participant with 22#. This gives individual participants the ability to mute themselves or the moderator to mute participants in such a way the participants can deactivate the mute at will. This is useful if the moderator does not have access to Realview to see which line is the source of noise and mute it individually. As participants remove the mute, the offending line will be easily identified.

1. Press **11#** on the phone keypad to mute yourself.
2. Press **22#** on the phone keypad to unmute yourself.

A moderator can press **16#** on the phone keypad to self mute all users. Using this option, the participants can use **#22** to unmute themselves to ask a question or to make a comment.

The second form of muting is Moderator Muted. It can only be activated or deactivated by the moderator. This is used for presentations and other conferences that are a presentation, lecture, training, etc. At the appropriate time(s) the moderator can remove the muting and open the floor to questions. A more refined version of this is to instruct participants on the use of hand raising, then the moderator can unmute only those that have raised their hand.

1. Press **43#** on the phone keypad to moderator-mute all participants.
2. Press **44#** on the phone keypad to moderator-unmute all participants.

To mute a particular participant, the moderator should use the *RealView page*.

Use Classroom Mode

Classroom mode allows participants to enter a conference automatically self-muted. Participants can raise their hands, which plays a tone to let the teacher know there is a comment or question. Participants can also unmute themselves to barge in. The teacher can unmute all with raised hands.

To use classroom mode as a teacher, do the following:

- Press **16#** on the phone keypad to mute all attendees.
- A tone will play to indicate that a participant has raised his or her hand. This tone is configured in the web portal.
- Press **61#** on the phone keypad to unmute all with raised hands.
- Press **16#** again to remute all attendees. Hands are automatically lowered.

To mute a particular participant, the moderator should use the *RealView page*.

To use classroom mode as a participant, do the following:

- Press **14#** on the phone keypad to raise your hand. You will hear a confirmation tone that your hand is raised.
- Press **15#** on the phone keypad to lower your hand. You will hear a confirmation tone that your hand is lowered.

- Press **22#** on the phone keypad to unmute yourself to barge into the conference.

Use Analyst Mode

Analyst mode allows participants to enter a conference automatically moderator-muted. Participants can raise their hands, which plays a tone to let the analyst know there is a comment or question. Participants cannot unmute themselves. The moderator can unmute all with raised hands.

To use analyst mode as a moderator, do the following:

- Press **43#** on the phone keypad to moderator-mute all participants.
- A tone will play to indicate that a participant has raised his or her hand. This tone is configured in the web portal.
- Press **61#** on the phone keypad to unmute all with raised hands.
- Press **43#** again to remute all attendees. Hands are automatically lowered.

To use analyst mode as a participant, do the following:

- Press **14#** on the phone keypad to raise your hand. You will hear a confirmation tone that your hand is raised.
- Press **15#** on the phone keypad to lower your hand. You will hear a confirmation tone that your hand is lowered.

You cannot unmute yourself.

Start and Stop Recording

When you add the conference room, you can indicate whether the system should record conferences. This control allows you to start and stop recording as needed during the call.

1. Press **41#** on the phone keypad to start recording at any time during the conference.
2. Press **42#** on the phone keypad to stop recording at any time during the conference.

All recorded segments are accumulated in a file. The system places a link on your *Reports page* to allow you to listen to or download the recordings.

Lock and Unlock a Conference

If all of the necessary or a sufficient number of participants have joined, you can choose to lock the conference to additional participants. This prevents any users (unauthorized or authorized) from gaining access to the conference. This control is commonly used to prevent distractions by people arriving late to a conference. You can unlock a conference later as needed.

1. Press **45#** on your phone keypad to lock the conference.
2. Press **46#** on your phone keypad to unlock the conference.

Restore a Conference

Sometimes, after using dial out in-conference controls, you might loose track of the current conference state. This control allows you to restore the conference to its default state.

- Press ****#** to restore the conference to its default state.

Disconnect a Conference

This control allows you to disconnect the conference to make the reserved ports available for other conference calls (e.g., a conference was scheduled for one hour, but completed in 30 minutes).

- Press ***0#** to disconnect all participants and the moderator from the conference call.

Collect Votes

You can have conference participants vote on an issue by collecting their phone keypad responses. You must start the round of voting. Then participants enter their votes. Finally, you end the round of voting.

1. Using your phone pad, dial **54#**. This will start a round of voting.
2. To enter your vote (both the Moderator and Participants), press **55#** on the phone keypad.
3. Enter up to eight vote digits.
4. Press #.
5. To end the round of voting, press **56#**.

Viewing the End of Conference Summary Report

Depending on the configuration of your system, you may receive an email with an end of conference summary report when your conference is over, as shown below.

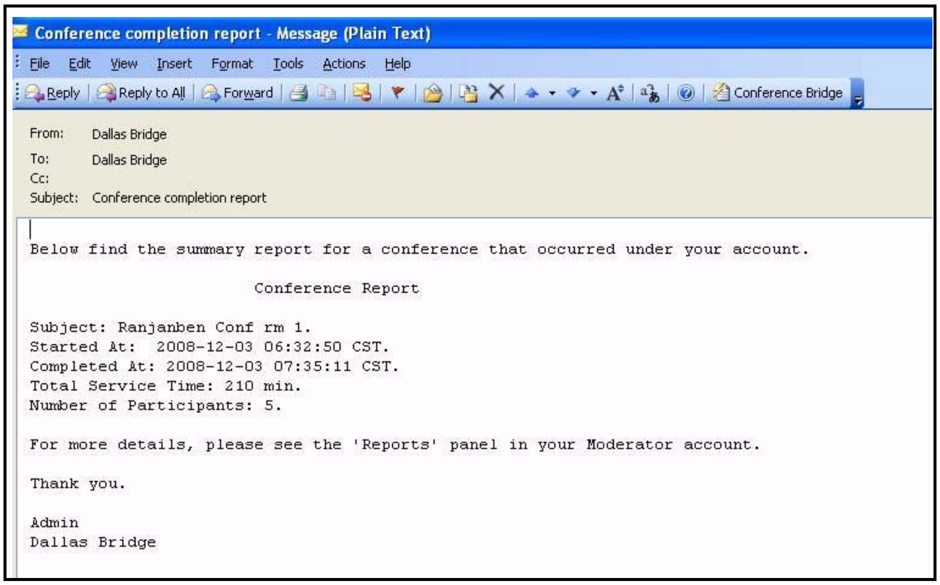


Figure 12 – The End of Conference Summary Report

The report includes details about the conference start and end times and participants.

To check the settings for Conference Summary, go to the *Manage Profile* screen. In the lower right corner are the **Summary Email Options**.

1. Select the Frequency of the reports. If the choice is Daily Digest, select the Report Hour to indicate the time the Strata Meeting server should send the report.

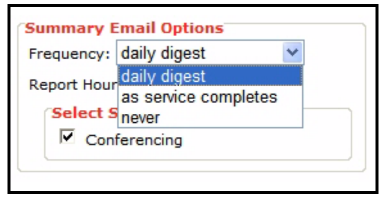


Figure 13 – Summary Email Options on *Manage Profile* Screen

The System Administrator must configure Strata Meeting to send emails.

Audio Conference Controls

Participant Conference Controls

The table below describes the controls currently available on the system for participants during a conference. Press the code into your phone keypad, including #, for each action.

Code	Description
11#	Mute Self
22#	Unmute Self
14#	Raise Hand
15#	Lower Hand
55#	Enter voting mode. You can then enter vote digits, followed by #.

Moderator Conference Controls

The table below describes the controls currently available on the system for moderators during a conference. Press the code into your phone keypad, including #, for each action. Most of these controls are also available as web controls on the *RealView page*.

Code	Description
11#	Mute Self
22#	Unmute Self
16#	Self Mute all users
31#	Initiate Dial out. Moderator will hear dial-tone. Next, dial external party’s number followed by #. After conversing with the called party, use the following two controls: 32# or 33#.
32#	Bring external party into conference
33#	Drop external party and re-join conference
41#	Start recording
42#	Stop recording
43#	Mute all
44#	Unmute all
45#	Lock conference
46#	Unlock conference
* * #	Restore original conference (abort dial out)
54#	Start a round of voting
55<vote digits>#	Enter a series of vote digits (up to eight)
56#	End a round of voting
61#	Unmute all with raised hands
62#	Disable hand raise notifications
* 0 #	Disconnect conference

Conducting Web Conferences 5

End User System Requirements

Web conference meetings run on typical desktop hardware. A computer with at least 1GHz processor, and 1 GB of RAM is required. An internet connection is required (broadband is recommended).

Client Browser Requirements

For attending web conference meetings, users can access the meeting with any of the following operating systems:

- Mac
- Windows
- Linux

Meeting attendees can use any of the following browser software:

- Internet Explorer 8.0
- Firefox
- Mac Safari
- Chrome

Although earlier versions of the browsers also function, it is recommended that you use the latest versions of the browsers with latest security patches.

Note: Flash Version 10.3 onwards is required. Please upgrade to the latest Flash Player for optimal performance. Attendees can check their flash version by going to http://www.adobe.com/software/flash/about/.

Starting a Web Conference

To start a web conference as the moderator (host), go to the *Defined Conferences page* and select **meet** next to the conference room you want to start, as shown below.

Figure 14 – Starting a Web Conference

Joining a Web Conference

Participants receive an email message for the web conference. Refer to the "Inviting Users to Your Conference" section on page 18 for more information on sending and accepting invitations to web conferences.

1. To join a conference, the participant should click on the link in the email.

The system opens a page to join the meeting, shown below.

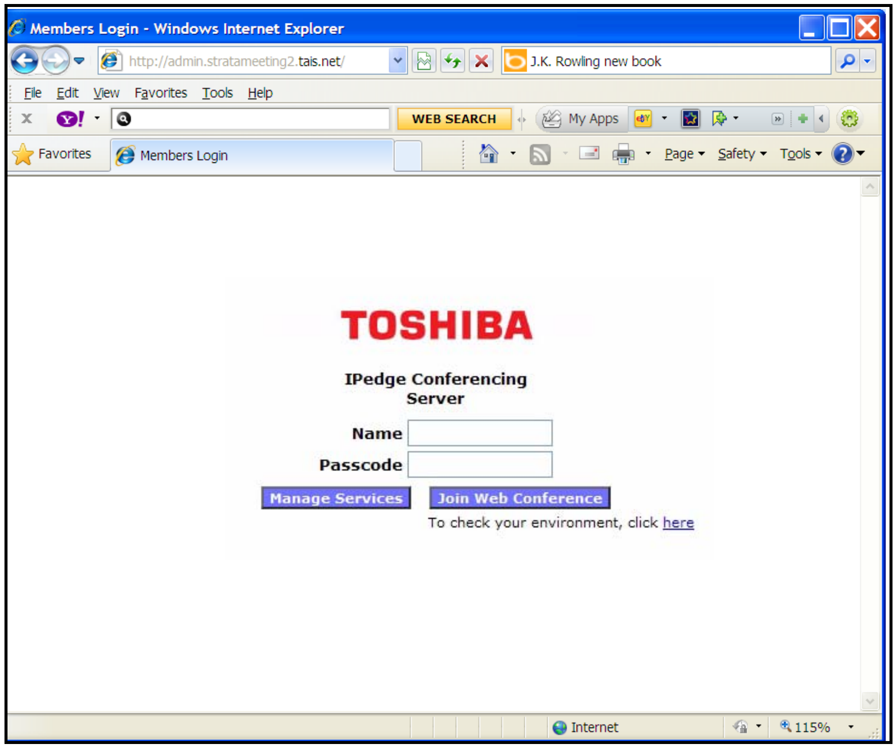


Figure 15 – Join Web Conference Sign In Page

2. If not already filled in, enter the Access Code, which you can obtain from the meeting host.
3. Enter a Name to identify yourself in the web conference (up to 12 characters) and select Enter.

Understanding the Web Meeting Interface

All of the web conference controls are on the Web Meeting page.

The Web Meeting Page

The *Web Meeting page* is where you will have your web conference. It includes all of the host and participant controls for the web conference. The following illustration provides an overview to the page, including labels to explain each part of the screen. Refer to the following sections for more details about each feature.

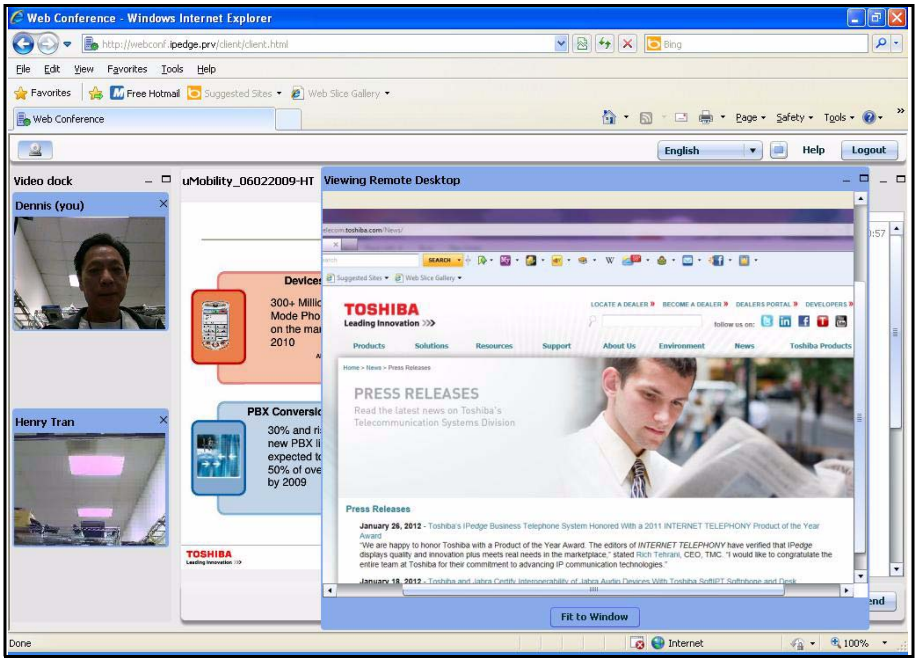
Figure 16 – The Web Meeting Page

1. The chat window displays the URL of the web meeting page, as well as the associated audio conference Dial In number and participant Access Code. You can copy the URL to your clipboard.
2. The Screen Sharing icon allows a presenter to share all or part of his screen.
3. The video icon allows users to share their video cameras.
4. The *Presentation* area allows a presenter to upload documents. Users may then view the documents.
5. The *Users* area lists participant's names who have joined the web conference. It has controls to allow a moderator to transfer the role of presenter to other participants and remove participants. Users are able to raise and lower their hands and open the video window of the other participants.

You can resize or move any of the windows in the web meeting page. You can also minimize and restore any windows that you are not currently using.

Sharing Your Desktop

When you share your desktop, the web conference participants see whatever you have on your screen (shown below). You can share all or part of your screen.



The system displays a dialog to determine whether to share all or a part of the screen.

1. If you are only sharing part of your screen, select `Region` and place the highlighted square around the area you want to share. Or select `Full Screen`.

Note: When using full screen sharing, you should adjust the monitor resolution to 1024x768. The higher the resolution, the longer it will take to update the screen. Presenters should also use a solid color wallpaper image. Having a solid background image will make the switch between applications much faster.

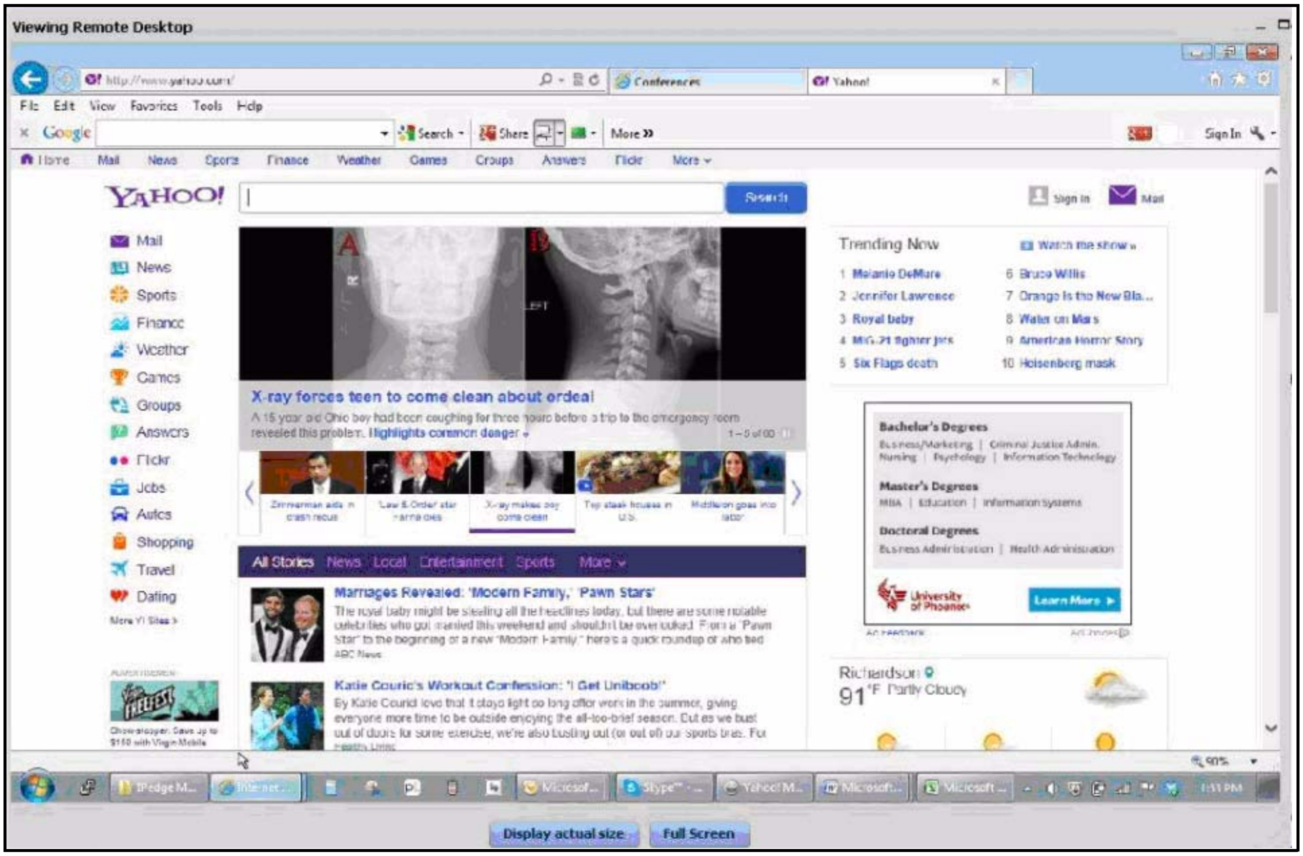
2. Select `Start Sharing` to share your desktop with web conference participants. Select the `Close` button to return to the *Web Meeting page* without sharing your desktop.

The system displays a dialog indicating that it is starting desktop sharing. The process may take a few moments.

3. An icon in the system tray indicates that screen sharing is in progress. A preview pane is shown in the application area.
4. To stop desktop sharing, close the Screen Sharing Preview Window, using either the X in the top left or the `Close` button in the middle at the bottom.

The system displays a message indicating that it may take a moment to stop desktop sharing.

The Participant view is shown in the following screen.



A participant can click on the 'Full Screen' icon at the bottom to see a Moderator's entire screen. If a participant's screen is larger than the Moderator's screen, the system will automatically maximize the image and project it on the larger screen. The participant can click on ESC to view the Moderator's screen projected onto the whiteboard area.

The Participant can click 'Display Actual Size'. This shows the actual size of the Moderator's screen. If a Participant's screen is smaller than the Moderator's than in this case the Participant can use the scroll bars (vertical and horizontal) to see different parts of Moderator's screen.

Sharing Documents

You can share PDF documents via document upload and sharing facility.

During the document presentation, the presenter and the participants (if the moderator allows them) can annotate the document using the annotation tools.

Note: For a participant to annotate, he or she must be made the presenter.

1. Select Documents in the Show Items area of the Web Meeting page to share a file with the web conference participants.

The system displays a dialog box, shown below, to indicate which document to upload.

.

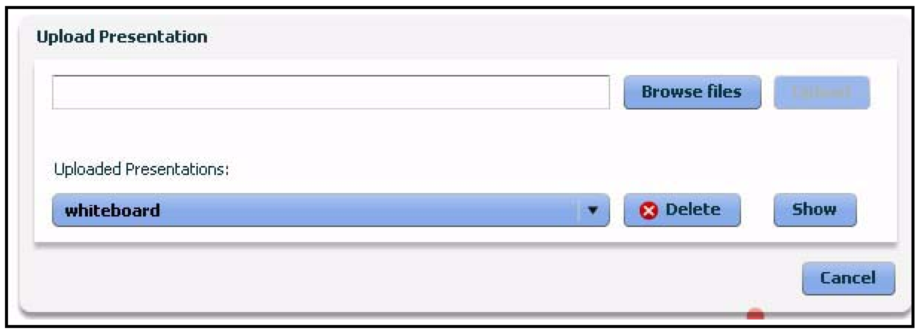


Figure 17 – Upload PDF Document

2. Select the Browse Files icon to select the file to upload by web conference dialog box. Locate the file on your PC or network and select **Open** to select the file.
3. Select **Upload** to start the document upload, which will consist of the system verifying that the file is a supported type and of the correct size, followed by the actual upload, and finally the conversion. Or select **Cancel** to close the Upload Presentation dialog and return to the previous Web Meeting view.

The system must upload, convert, and prepare the presentation for sharing. This takes a few moments, or longer for larger documents. Then the system displays the document in the sharing window (shown below).

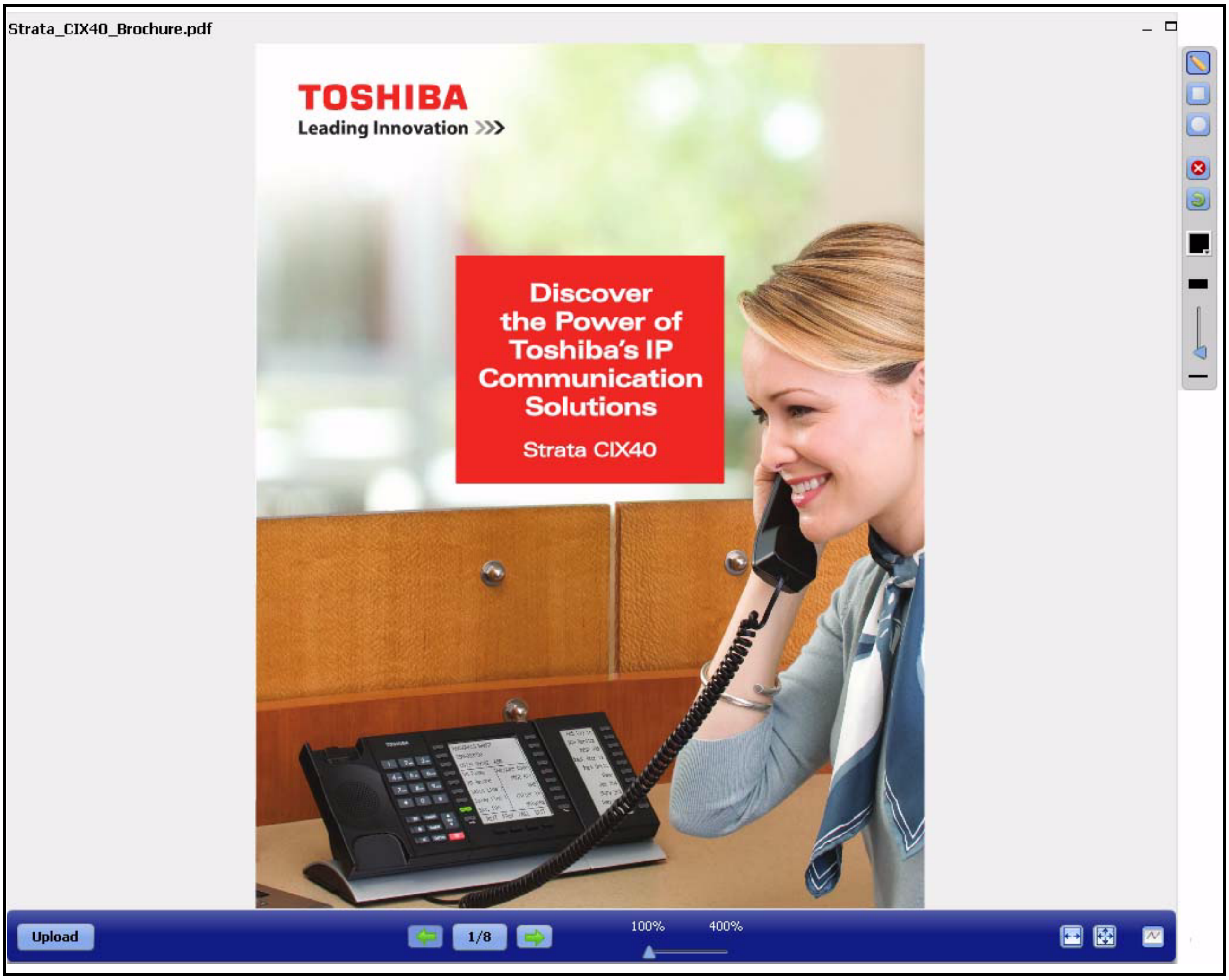


Figure 18 – Web Meeting Using a Document

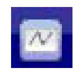
Refer to "Using the Annotation and Presentation Tools" on page 32 for more information about the drawing, annotation, and presenter tools.

Document Navigation

The following tools are available to navigate through the document:

- Previous – Select this tool to go to the previous page in the document.
- Next – Select this tool to go to the next page in the document.
- X/Y button between Previous and Next – Select this tool to see the thumbnail view.
- Slider – The moderator can control the zoom between 100 to 400%.
- Reset Zoom button – Select this tool to return the zoom to 100%.
- Show Whiteboard – Select this tool to bring up the Annotation tools.

Using the Annotation and Presentation Tools

There are several drawing, annotation, and presenter tools available when you share documents during the web conferences. The tools are explained below. The tool palette can be turned on by clicking 

Note: For a participant to annotate, he or she must be made the presenter.

Highlighter 

Use the `Highlighter` tool to add freehand lines to your drawing.

Click on the `Highlighter` tool, then click anywhere in the presentation area to draw. When you have finished drawing, click on another tool.

When using the `Highlighter` tool, the following two additional tools are available:

- Color Selection
- Pencil size

Rectangle 

Use the `Rectangle` tool to draw a rectangle.

Click on the `Rectangle` tool, then click anywhere in the presentation area to draw rectangles. When you have finished drawing, click on another tool.

When using the `Rectangle` tool, the following additional tools are available:

- Color Selection
- Line Width

Circle 

Use the `Circle` tool to draw a circle.

Click on the `Circle` tool, then click anywhere in the presentation area to draw circles. When you have finished drawing, click on another tool.

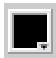
When using the `Circle` tool, the following additional tools are available:

- Color Selection
- Line Width

 Use the `Clear Page` tool to erase all shapes and annotations.

Undo Shape 

Use the Undo Shape tool to remove the last shape that you drew from the presentation.

Select Color 

Use the Select Color tool to select a color for your freehand drawing, square, or circle.

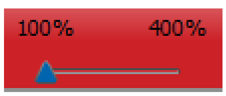
To select a color, click on the arrow to open the color palette. Click on a color to select it.

Change Thickness

Use this tool to select a width for your drawings, squares, and circles.

To change the size of the line width for any drawing, slide the slider up or down arrows to adjust the thickness finer or thicker.

Zoom



Use the Zoom tool to zoom in or out in the presentation area.

Show or Hide Tools

Use the Show or Hide Whiteboard Annotation tool to show or hide the tool palette.

Using Public Chat

The *Public Chat* area displays a message when participants join the meeting. It also displays any chat messages entered by any participant. A sample is shown below.

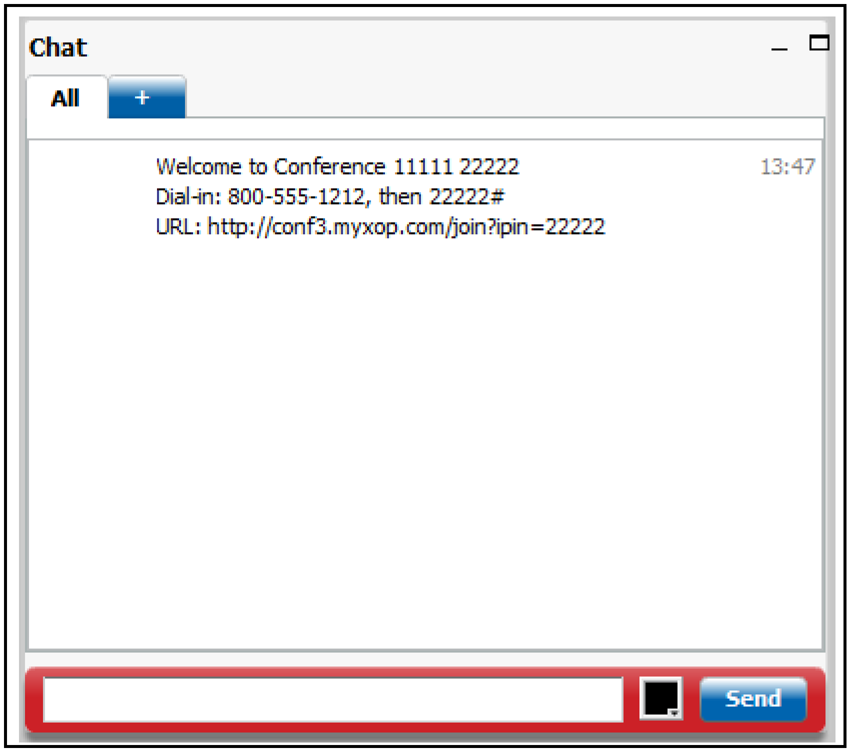


Figure 19 – The Public Chat Area

1. To enter a chat message, type your message and press **Send**.

The message is displayed in the Public Chat area. System messages and your own text appear in red. Messages by other participants appear in blue.

2. To hide the Public Chat area, click on the minimize icon in the Public Chat title bar.

Using Private Chat

The Web Conferencing also allows for Private Chat between any two Attendees.

1. To start a private Chat session, click on the  next to the **All** tab in the Chat area.

The Private Chat window displays a list of participants, as shown below.

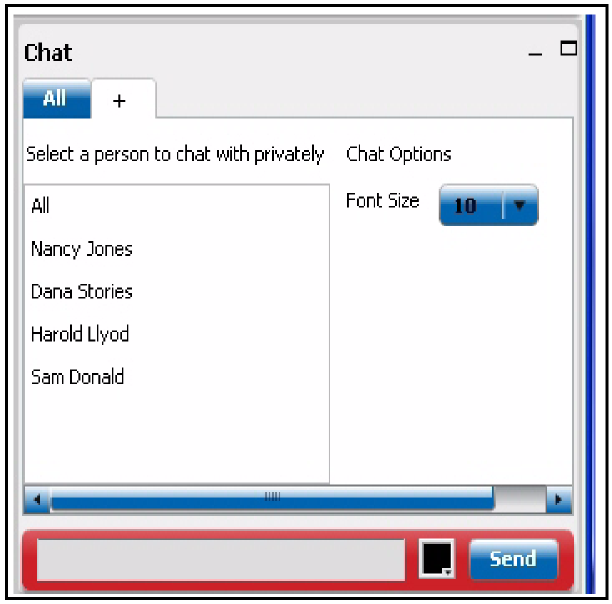


Figure 20 – The Private Chat Window Options

2. If you want to change the font size for the private chat, select a new size from the **Font Size** drop down list.
3. Select the participant you want to chat with from the list.
4. The participant you selected now has his or her own tab. The tab flashes when there is a new chat message.
5. You can add additional private chat sessions at any time by clicking the + tab again.
6. To close a private chat session, click the red X in the top of the tab.

Using the Users List

The *Users* area lists all of the users who have joined the web conference. It shows an icon and their display names.

The *Users* area is where you change the presenter control.

A sample *Users* area is shown below.

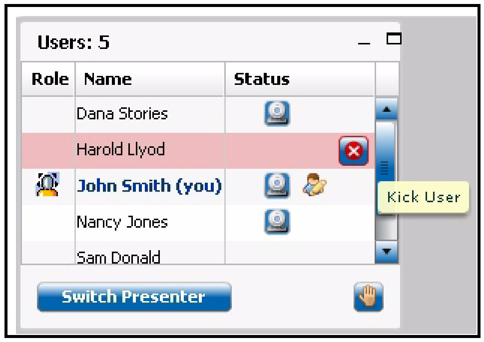


Figure 21 – The Users Area

1. Select the up or down arrows on the scroll bar to navigate through the list of users.

As Moderator, highlight a participant with the mouse and a red X will appear.

Click the  icon to remove the user from the conference.

WARNING! There is no confirmation box to remove the user. The exit is immediate.

2. Select the web cam icon  to open the video camera window of the selected user.

3. Select the Raise Hand icon  to indicate that you want to ask a question or make a comment.

Changing Presentation Control

The host of the web conference can temporarily allow another participant to control the meeting.

1. Select the participant's name in the User's area and select **Switch Presenter**.

The host's screen changes to look like that of the other participants.

The participant selected to gain presentation control now has the presenter icon next to his name. The share desktop icon appears at the upper left of the users list, shown below.

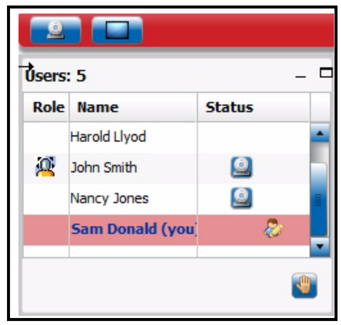


Figure 22 – User has become Presenter

2. To take control back, or to transfer to another user, the Moderator selects the new presenter from the User's list and selects **Switch Presenter**.

The screen changes back to the presenter's view. The participant who had control will notice that the presentation-related icons (i.e., document share, annotation tools, zoom control, Desktop share icon, and presenter icon) next to his name are no longer available.

Leaving or Ending the Meeting

Participants can leave the meeting at any time.

1. To leave the meeting, select the **Logout** link on the title bar at the top of the web conference.

If the conference is configured with the **Stop conference when moderator disconnects** option, the meeting will end when the Moderator logs out.

This page is intentionally left blank.

RealView 6

This chapter explains how to use the RealView™ features. The RealView pages show real time activity occurring on the system across all Moderator accounts for each type of service.

Viewing Real Time Activity

While a conference is in progress, you can use the RealView application to see the conference taking place in real time.

The RealView Page

The *RealView Page* shows real time activity associated with any and all services. You can see both active and inactive services.

To access the RealView features, select **RealView** from the *Moderator Menu* or the **Real View link** on the *Home page*. The system displays the *RealView page*, shown below.

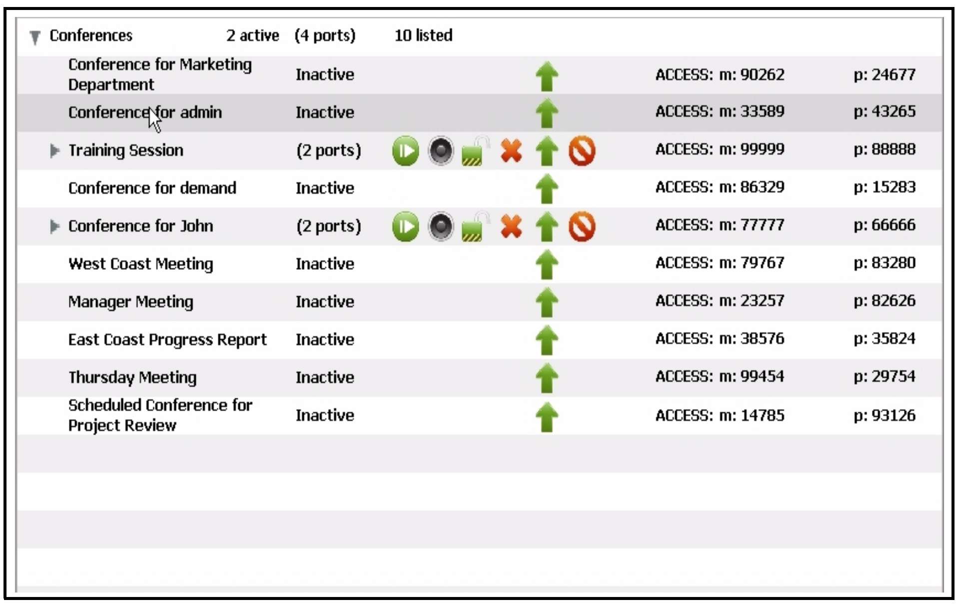


Figure 23 – The RealView Page

You can show details, mute/unmute, disconnect, transfer, start/stop recording, and lock the conferences from the *RealView page*. To see more information about a conference, select the arrow next to the conference name.

The system displays the following information related to an active conference:

- Conference Room Name
- Each participant's name, if it is in the system address book as a moderator-defined user; otherwise, the Participant phone number, with an icon to identify the user as a participant or the moderator

- The moderator access code
- The participant access code
- The time the participant joined the call
- The port state (e.g., about to join conference, waiting to join conference, in conference, etc.)

The following Moderator controls are available during a conference on the web interface from the *RealView page*:

- Record or stop recording the conference
- Mute or unmute a single or all participants
- Lock or unlock the conference
- Disconnects selected participants
- Transfer selected participants
- End the conference

Refer to "Controlling Conferences with RealView" for details about these features.

Controlling Conferences with RealView

This section describes the various conference controls provided in RealView.

The following Moderator controls are available during a conference on the web interface from the *RealView page*:

- Muting a single or all participants
- Disconnecting participants
- Recording or stopping recording
- Locking a conference
- Transferring one participants to a different conference

Muting Participants using RealView

To mute a particular participant, such as if a participant is in a noisy environment that is disrupting the call:

1. Check the box for the participant you want to mute.
2. Select the mute icon.

The RealView page displays an M for moderator-muted or S for self-muted (if the participant used in-conference controls to mute self).

You can also select the mute icon for the conference to mute all participants.

Disconnecting Participants using RealView

To disconnect a participant and make the reserved port available:

1. Select the box next to the participant(s) you want to disconnect and select the **Disconnect** icon.

Recording Conferences using RealView

When you add a conference room, you can indicate whether the system should record conferences. This control allows you to start and stop recording as needed during the call.

1. Select the **Recording** icon to start recording the call.
2. Select the **Recording** icon again to stop recording the call.

Locking Conferences using RealView

If all of the necessary or a sufficient number of participants have joined, you can choose to lock the conference to additional participants. This prevents any users (unauthorized or authorized) from gaining access to the conference. This control is commonly used to prevent distractions by people arriving late to a conference. You can unlock a conference later as needed.

1. Select the **Locked** icon to prevent additional participants from joining the conference to minimize distractions from late arrivers.
2. Select the **Locked** icon again to allow participants to join again.

Transferring Conference Participant using RealView

You may need to transfer one or more participants to another ongoing conference call.

1. Select the Attendees that you want to transfer. Check the boxes next to the participant(s) you want to transfer, as shown below.

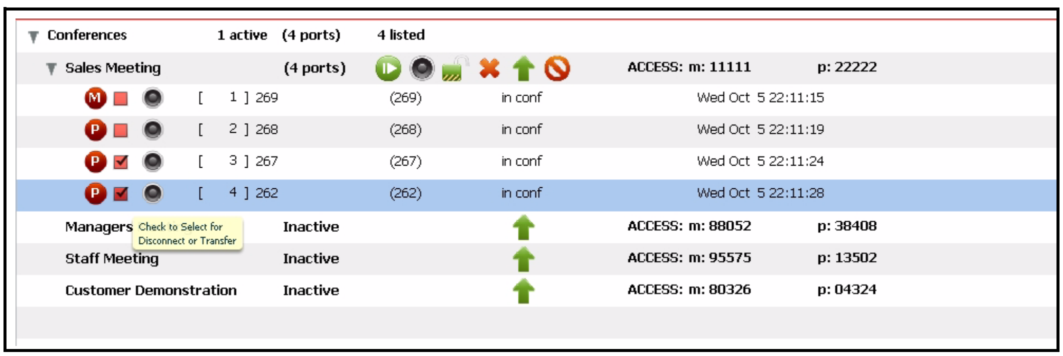


Figure 24 – Transferring Conference Participants Using RealView

2. Select the transfer icon for the destination conference from the list, as shown below.

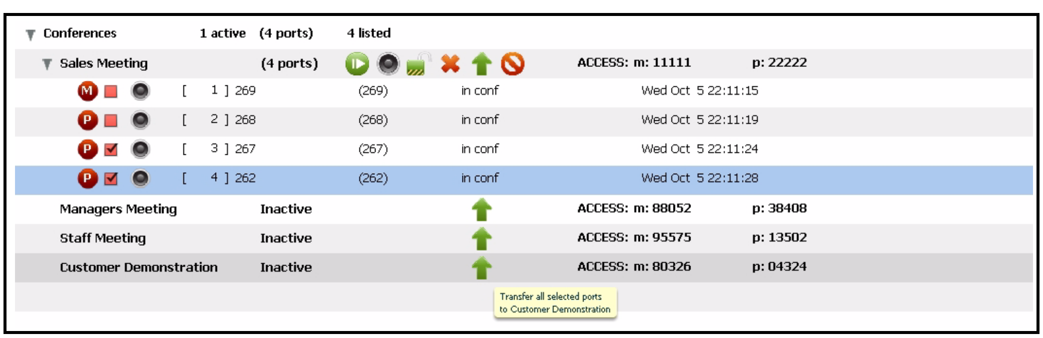


Figure 25 – Transferring Selected Participants to Destination Conference

The system displays a dialog box to confirm the destination for transferring the selected participants.

3. Select **Yes** to complete the transfer, or **No** to cancel.

The following illustration shows a completed transfer.

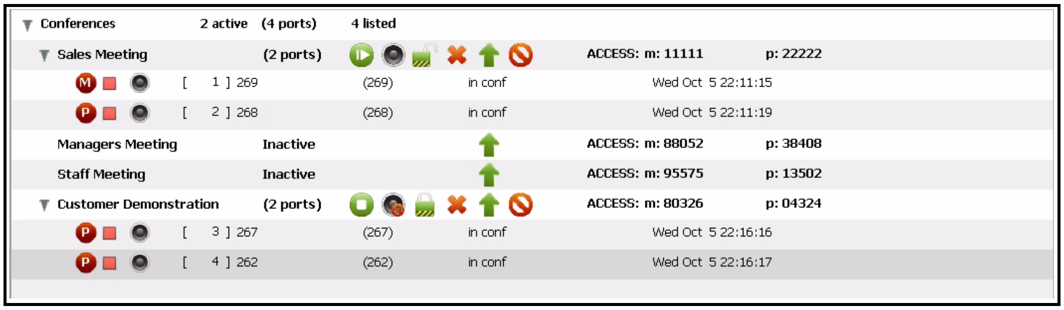


Figure 26 – Completed Transfer

Reports 7

This chapter explains how to use the reporting features.

Viewing Service Reports

The system creates reports for all conferences. The reports are listed on <page/windowname>The Service Reports Page. This page provides links for Audio Conference Recordings. <page/windowname>The Service Reports Page indicates additional information for selected services.

The Service Reports Page

To access the service reports, select **Reports**. The system displays the *Service Reports page*, shown below.

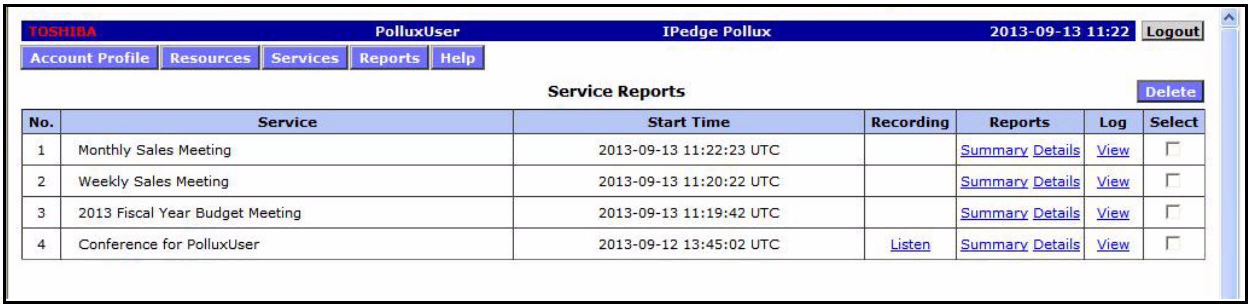


Figure 27 – The Service Reports Page

The system displays the following information for your reports:

- The **Number** is a system generated report number.
- The **Service** is the conference name.
- The **Start Time** indicates when the conference or service began.
- The **Recordings** column lists any recordings associated with the selected conference. Single recordings are marked **Listen**. If there are multiple recordings (as for multiple segments or a recurring conference), the recordings are numbered. Refer to “Listening to a Recorded Conference” on page 44 for more information.
- The **Size** indicates the file size of the recording(s).
- The **Reports** column includes links to summary and/or detail reports.The **Details** link opens a CSV file containing a detailed view of the service. Refer to “Viewing Report Details” on page 44 for more information.
- The **Log** column includes a link to download call textual logs associated with the conference all services. Refer to the “Viewing a Conference Log” section on page 45 section for more information.

To delete a report, check the **Delete** box next to the item and select **Delete**.

Listening to a Recorded Conference

The Service Reports Page provides links to any recordings of your conferences.

1. To listen to recorded conference, select the **Listen** link (or the number for multiple segments) next to the conference listed on the *Service Reports page*.

The system opens your default media player and begins playing the recording.

Viewing Report Details

You can download a CSV file with service details to use in your spreadsheet program to sort or manipulate the information as needed.

1. To download a CSV file containing details about a service, select the **Details** link next to the service listed on the *Service Reports page*.

The system opens a dialog asking whether you would like to Open or Save the file.

2. Select **Open** to open the file in a spreadsheet (such as Microsoft Excel) or **Save** to save the report on your computer to open at a later date.

	A	B	C	D	E	F	G	H	I
1	Name	Number Dialed	Called At	Connected At	Disconnected At	Connect Time (h:m:s)	Outcome	Additional Info	
2	2101	6004	N/A	2013-09-13 11:22:21 PDT	2013-09-13 11:22:42 PDT	0:00:21	INBOUND	JOINED-CONF	
3	P1 User	6001	N/A	2013-09-13 11:22:31 PDT	2013-09-13 11:22:43 PDT	0:00:12	INBOUND	JOINED-CONF	
4									
5									
6									

Figure 28 – Report Details File

The file displays the following information for conferences:

- The caller phone number
- Name, if available in the system database as a user
- The time the participant was called and disconnected
- The total time the participant was connected
- Any votes collected during the conference

Viewing a Conference Log

The conference log provides details on when each participant joined and left the conference and the time of any in-conference controls.

1. To view the conference log, go to the *Service Reports page* and select the **View** link next to the conference.

The system displays the log information, as shown below.

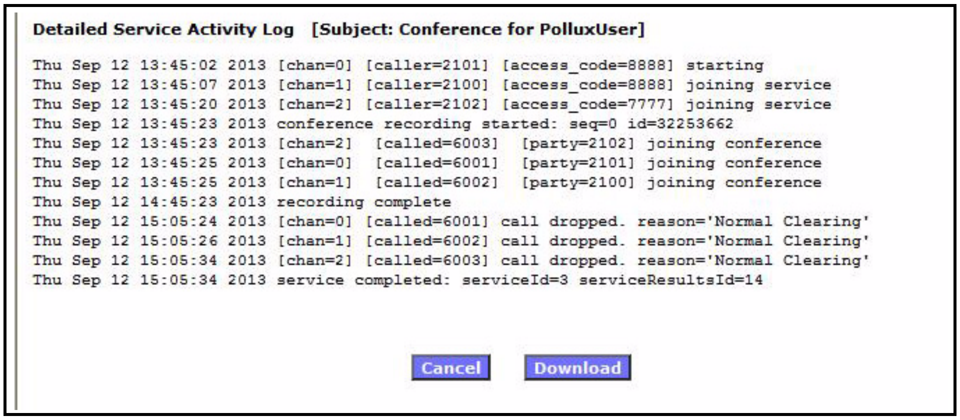


Figure 29 – The Detailed Service Activity Log

2. To download a text file including the log information, select **Download**.

The system opens a dialog asking whether you would like to Open or Save the file. Select **Open** to open the file in Notepad or **Save** to save the log on your computer to open at a later date.

The file displays the conference events (such as participants joining) by the time they occurred.

3. To return to the *Service Reports page*, select **Cancel**.

This page is intentionally left blank.

Managing Your Profile 8

This chapter explains how to update your profile.

The Manage Profile page allows you to control your personal information and view the privileges and defaults.

The Edit Moderator Profile Page

To modify your profile, including changing your password, select **Manage Profile** from the *ModeratorMenu* or the **Manage Profile link** on the *Home page*. The system displays the *Edit Moderator Profile page*, shown below.

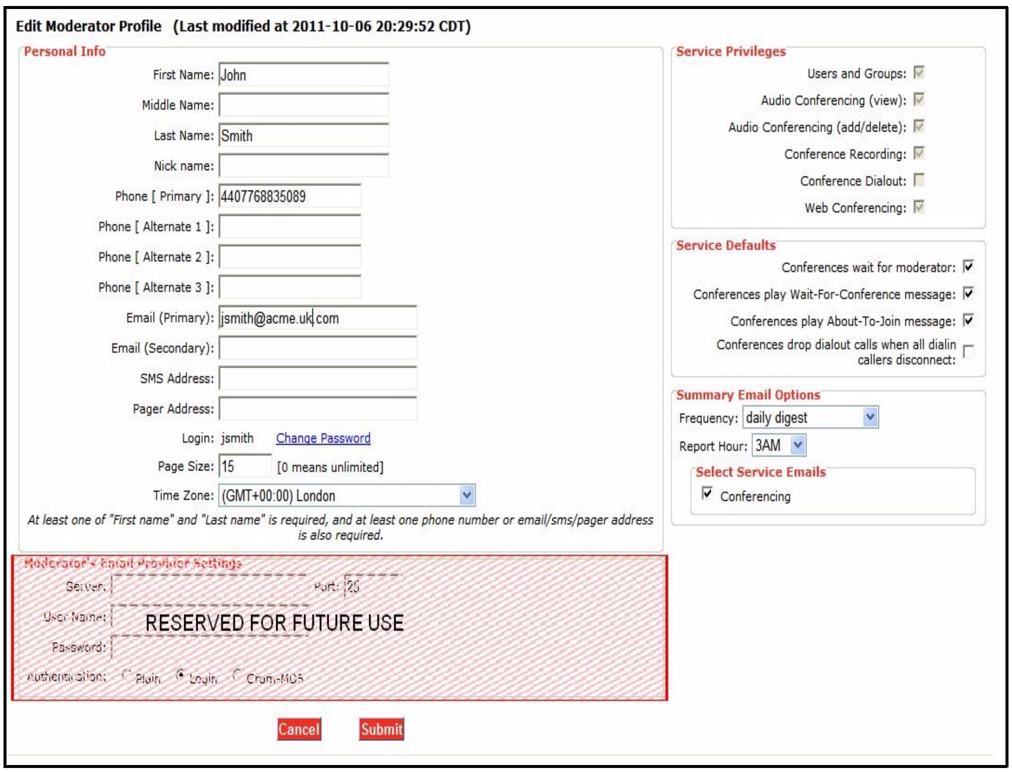


Figure 30 – The Edit Moderator Profile Page

WARNING! For added security, change your password at the earliest possible opportunity.

1. Enter your **Personal Information**. Required information includes:
   - Either a first name or last name
   - At least one phone number or email/sms/pager address

Note: The email address is used as a “from” address when the system emails on behalf of the moderator for any service applications.

2. Select the **Change Password** link to open *The Change Password Page*.
3. Select your home time zone from the **Time Zone** drop down list.
4. The **Privileges** on the right side identify the services that are turned on by the System Administrator for this account.
5. Select or deselect the **Defaults** as applicable from the following. These Defaults will apply to any conference added by the Moderator, but do not change existing conferences.

- Check the **Conferences wait for Moderator** box to indicate that conferences will have the Wait for moderator to join option selected as the default.
- Check the **Conferences play Wait-for-Conference message** box to indicate conferences will have the **Play Wait -For-Conference announcement** option selected as the default.
- Check the **Conferences play About-to-Join message** box to indicate conferences will have the **Play About-To-Join announcement** option selected as the default.
- Check the **Conferences drop dialout calls when all dialin calls disconnect** box to indicate that conferences will have the **Drop Dialout calls when all dialin callers disconnect** option selected as the default.

Note: Selecting this option does not affect any existing conferences.

6. Select your preferred **Summary Email Options**:
    - Select a **Frequency** to receive emails from the drop down list.
    - Check the service option boxes to indicate the services for which you would like to receive summary email reports.
7. Select **Submit** to save changes to your profile information or **Cancel** to ignore the changes and return to the *Home page*.

The Change Password Page

To change your password, select the **Change Password** link from the *Edit Moderator Profile page*. The system displays the *Change Password page*, shown below.

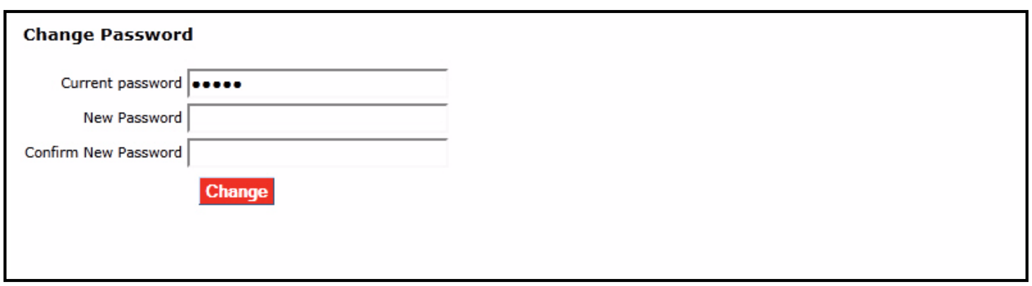


Figure 31 – The Change Password Page

1. Enter your **Current Password**.
2. Enter your **New Password**.
3. Retype your new password in the **Confirm New Password** field.