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# WEB MEETING USER GUIDE

AUGUST 2017



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# WEB MEETING OVERVIEW

The Web Meeting service consists of two separate applications: Conference Center for setting up and managing web meetings, and Conference Controls for conducting web meetings and audio conferences.

## Conference Center

Logging in as the chairperson brings up the Conference Center application. The Conference Center is where you schedule and organize web meetings, manage invitations and registrations, track participation and feedback, and launch your web meetings. You can also manage meeting recordings, set up podcasts of your recordings and view reports.

## On-Demand Meetings

On-demand meetings are web meetings that are held without being previously scheduled. You launch on-demand meetings from the Conference Center. Participant registration information and feedback from on-demand meetings are limited to your existing settings, which you may choose to modify.

## Scheduled Meetings

Scheduled meetings are web meetings that you set up in advance and invite people to attend. You can require invitees to pre-register or allow them to register when they join the meeting. Invitations can be sent by email and posted to Facebook and Twitter accounts.

Links to the meeting registration page can be embedded in email or web-based announcements as part of marketing campaigns, and you can track the registrations separately for each campaign. You can customize the registration page to provide detailed information about the meeting and presenters, and collect information from the registrants.

Meeting reminders, post-meeting emails, and post-meeting surveys provide a variety of opportunities to communicate with people before and after your meetings. You have the option to customize these communications.

## Broadcast Audio

The audio portion of a web meeting can be broadcast over the Internet instead of, or in addition to, over the phone. This allows your participants to listen to the meeting when using a phone is not convenient. Broadcast audio is one-way only.

## Reports

The Web Meeting service automatically generates reports for your web meetings and audio conferences. The reports include who was invited to your meetings, who registered and how they registered, and who actually attended your meetings. The reports also include information collected during registration, as well as information from the meeting itself, such as chat transcripts and polling results, and post-meeting survey results.

## Recordings

Audio conferences (on-demand, scheduled and operator-assisted) and web meetings can be recorded and played back later. The audio portion of a meeting is automatically synchronized with the web portion. You can edit recordings, download them, attach them to meeting communications, and post them on Facebook, Twitter, and other websites.

## Podcasts

Web Meeting service provides you with everything you need to set up a podcast feed and turn your recordings into podcast episodes. Both audio-only and audio/video recordings are supported. When you add a recording to your podcast feed, it is automatically converted to the appropriate format so that people who subscribe to your podcast can download and play it.

## Conference Controls

The Conference Control application is where you upload presentations and conduct web meetings. You open the Conference Controls from the Conference Center.

## Upload and Present Slides

You can create presentations in Microsoft® PowerPoint® and upload them to the Web Meeting service, where they are available for you to use in your web meetings. Other file formats are supported, as well, for uploading pictures and other graphical content. You can reorder slides once they are uploaded. Various mark-up tools let you annotate and highlight slides as you present them.

## Designate Co-Presenters

The chairperson can designate one or more web meeting participants to be co-presenters. Co-presenters have access to all the conference controls to upload and present slides, create and insert polls, and share or grant control of their applications and desktops. Co-presenters do not have access to the audio controls.

## Share Applications

Presenters can share applications or their entire desktop during a meeting. Shared applications are visible to all meeting participants — up to 1,200.

## Grant Control

Presenters can grant control of individual applications or their entire desktop to meeting participants. When control is granted, both the presenter who granted control and the participant to whom control is granted can interact with the applications or desktop at the same time.

## Create Polls

Presenters can create polls and insert them among the slides in the presentation. Six different polling question types are supported. When a poll is presented during the meeting, participants submit responses that are tallied and optionally displayed back to the participants. Poll results are saved with other meeting reports in the Conference Center where they can be viewed and downloaded.

## Chat

The chairperson, co-presenters and participants can communicate with one another via text messages during a web meeting. Presenters can chat with each other, with individual participants, or with all participants at once. Participants can chat with the presenters but not with each other. Chat messages are saved with the other meeting reports in the Conference Center, where they can be viewed and downloaded.

## Record Meetings

Any audio conference or web meeting can be recorded and made available for playback later. The Conference Center provides features for managing, editing, and making recordings available for playback through downloads or social media channels.

## Control Audio

During an audio conference or web meeting, only the chairperson has a variety of audio controls available, including muting and un-muting lines, disconnecting participants, dialing out to participants, and locking the conference to prevent additional participants from joining. The audio controls include a phonebook to facilitate dialing out, and that is also used to automatically display the names of audio participants during a meeting who are listed in the phone book.

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# CHAIRPERSON: HOW TO ACCESS WEB MEETING

## Start an Ad-Hoc Web Meeting

1. Go to <https://conf.cfer.com/>
2. Under the Chairperson Login section select **Login**
3. Navigate to the left side of the page and select the **Start/Manage/Archive** link under the Web Meeting header.
  - a. If you have not previously installed Java™ 2 Runtime Environment 1.3, you will receive a message asking if you would like to begin installation of this plug-in. Click **OK** to start the installation.
    - i. Please read any messages that may appear during the installation process to insure a complete installation.
    - ii. When prompted for a File Download, select **Run this program from its current location.**
    - iii. When prompted to install and run the Java 2 Runtime Environment, click **Yes.**
    - iv. Follow the instructions provided during installation of the Java plug-in. If prompted to restart your computer, do so before proceeding.
  - b. A Java applet will launch Web Meeting. You will be prompted with a security notice indicating that the application is verified to have come from Conferencing. Click **Start** to continue.
4. Enter your conference phone number, access code, and passcode. Click the **Login** button.
5. From the Web Meeting Conference Center home page select the **On-Demand Meeting** radio button and click the **Open Meeting Controls** button.
6. Once the interface has loaded, click the **Start Meeting** button on the upper left side of the Web Meeting user interface.
7. When the security alert pop-up box appears, click **Start**.

## Schedule a Web Meeting and Send Invitations

1. Go to <https://conf.cfer.com/>
2. Under the Chairperson Login section select **Login**
3. Navigate to the left side of the page and select the **Start/Manage/Archive** link under the Web Meeting header.
4. From the Web Meeting Conference Center home page, select the **Schedule a Meeting** button.
5. Enter all the details for your meeting including, date, time, type, description and registration requirements. Click **Save and Next** to continue.
6. On the next page, you can preview the invitation and invite people by clicking **Send Invitations**.
  - a. Option 1: Enter email addresses in the "To:" box
  - b. Option 2: Upload a CSV file containing email addresses of desired participants
7. Once you are done determining which participants you want to receive the meeting invitation, click the **Send** button.
8. You can also customize other aspects of your meeting, including branding, reminder emails, and post-meeting surveys.

# PARTICIPANT: HOW TO JOIN A WEB MEETING

1. Go to <https://conf.cfer.com/>
2. Under the Participant Login section enter your Audio Conference phone number and access code and select **Login**
3. Enter your conferencing phone number and access code. Click the Login button.
  - a. If you are pre-registered for the meeting, you will be taken straight to meeting as long as the chairperson has already started the web conference.
  - b. If you have not pre-registered for the meeting, you will be prompted to fill out the Participant Registration page before you can enter the web conference. The only field you are required to fill out on the Participant Registration page is your name.

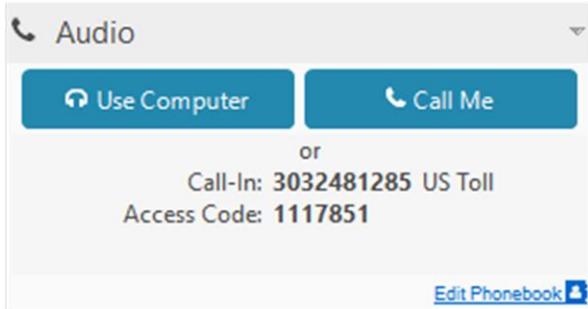
## Participant Registration

Name	<input type="text"/>	<b>Required</b>
Email	<input type="text"/>	
Phone	<input type="text"/>	
Company	<input type="text"/>	

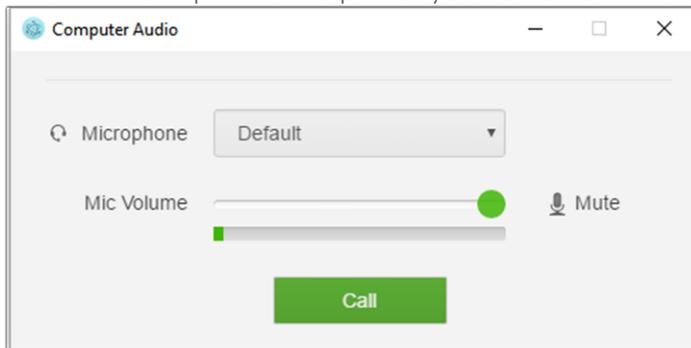
# STARTING/JOINING A WEB MEETING VIA COMPUTER AUDIO

## Getting Started (Chairperson)

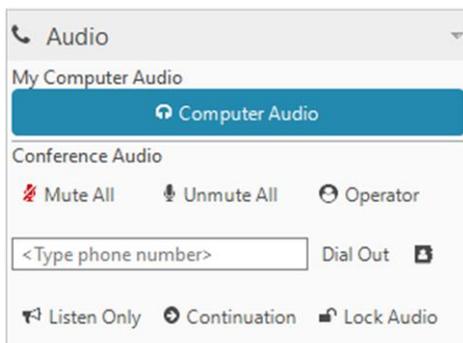
1. Once the web conference controls have been opened, click the **Use Computer** button on the left side of the screen.



2. Select the microphone and speaker you would like to use for the call using the drop-down menus.



3. Adjust the microphone and speaker volume (we suggest 75% for both) and then press the Select and Continue button.
4. You will then see the message shown below and will hear the following message as you are being connected to the call: "You are now being connected to the conference. Please stand by...beep...beep...You will now be placed into conference".
5. Once you are connected, you will see an audio control panel on the left side of your control window.



6. You can adjust the speaker and microphone volume and/or disconnect your call by clicking on the Computer Audio button. The Computer Audio panel will appear.

7. If you are experiencing audio issues while connected to VoIP, you can switch with using the phone by following these steps.

- Click the **Continuation** button.
- You will hear a message, "The conference will continue after you disconnect. To allow the conference to disconnect when you disconnect, press \*8."
- Click the **Computer Audio** button.
- Click **End**
- Click **Call Me** (or you can dial-in manually)
- Enter your phone number
- Click **Call My Phone**

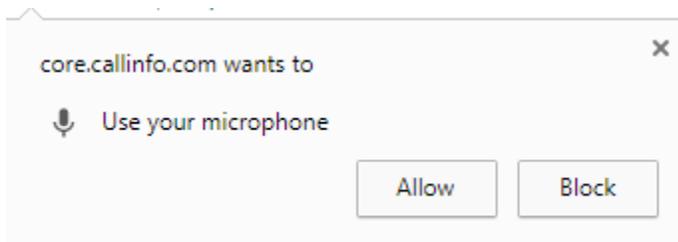
## Getting Started (Participant)

1. After joining a web conference as a participant, click on the **Join Online Audio** button in the settings panel on the left.

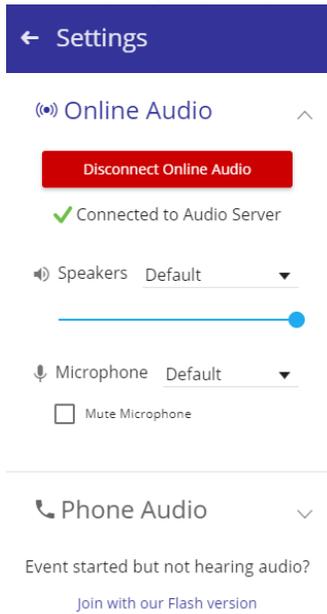
**NOTE:** An audio conference must be started by the host before the Audio button will appear for participants.



2. If prompted, click the **Allow** button for use of your microphone. If you do not select **Allow**, you may not be able to hear the audio or be heard.



3. You may adjust you speaker and microphone settings from the **Settings** panel.



4. To close the **Settings** panel, click the left-facing arrow.



5. To open the settings panel, click the cog wheel on the left corner of the navigation bars that appear when you move your mouse.



**NOTE: Why am I not seeing the Audio button to connect my Computer Audio Call?**

- Computer Audio may not be enabled for the account

## Additional Notes

- Up to 150 Computer Audio users may connect at the same time on a single access code.
- If more than 150 audio users attempt to connect (VoIP or telephone), the surplus users will hear a message that the conference is full.
- Up to 300 Computer Audio users may connect at the same time on a single access code. You must request an increase ahead of the meeting if you have more than 150.
- If more than 300 audio users attempt to connect (VoIP or telephone), the surplus users will hear a message that the conference is full.
- Mobile/tablet devices are not currently supported (although Apple® iPad® users can join the visual portion of web conferences, these users will not have access to the Computer Audio feature currently).
- Computer Audio will NOT work for a chairperson connected over a network that uses a proxy (Computer Audio will work for participants connected to a proxy).
- Computer Audio will not work over pipe networking.
- We recommend that users connect through a wired network connection when using the Computer Audio feature to ensure the best quality due to the many issues that an unreliable wireless or tethered connection can cause. Audio quality will degrade significantly on networks with download speeds of less than 1.5 Mbps or wireless networks with inconsistent signal strength.

## Computer Audio System Requirements

OPERATING SYSTEMS	SUPPORTED BROWSERS	SOFTWARE
Microsoft Windows XP (Service Pack 3), Vista, 7 & 8 (32 and 64 bit) Google Chrome	Internet Explorer (7.0+) Firefox Google Chrome Edge	Adobe Flash Player (10.3+) for 1E 7.0- 10.0
Linux 64bit (Limited Support)		
Apple Macintosh 10+	Safari (9.0+) Firefox Google Chrome	Adobe Flash Player (10.3+) for Safari 9.0

# WEB MEETING INTEGRATIONS

(ADDITIONAL WAYS TO ACCESS WEB MEETING)

## Connect Add-In for Outlook

The Connect Outlook Add-In makes it easy to schedule and start Audio Conference and Web Meeting from Microsoft Outlook. The add-in allows you to store your Audio Conference and Web Meeting subscription details in Outlook and automatically populate invitations with your meeting information.

### How to Install

1. Close all instances of Microsoft Outlook you have open on your computer and Connect Desktop if you have it.
2. Visit <https://support.callinfo.com/web-meeting-center-g/downloads>
  - o Located under Connect Outlook Add-in, click on **download** under Connect solutions. This Add-in will only work with Microsoft Outlook® 2007(SP3), 2010 & 2013 (32-bit and 64-bit versions)
  - o Windows® XP (Service Pack 2), Windows Server 2003 (Service Pack 1), Windows Vista, Windows 7,
  - o Windows 8 or later Windows operating system
3. Click to download either the **audio only** or **audio and web** add-in depending on your account settings. Select audio and web if you are a Web Meeting user.
4. Click **Run** when asked to save the file.
5. Click **Run** again when asked if you want to run the software.
6. Once installed you will be prompted to go through Setup Wizard as documented in the Setup section of this user guide.

### Setup

Once you have installed the add-in on your computer, you will be prompted to walk through the Setup Wizard. This may pop up instantly after you have downloaded the add-in or when you open your Outlook. To complete the setup, do the following:

1. Read the overview of the tool. Click **Next**.
2. Enter your personal information. Click **Next**.
3. Enter your Audio Conference subscription information. Click **Next**.
4. This step allows you to create a default list of dial-in phone numbers that will be displayed in your meeting invitations. To select a default set of dial-in numbers, click **Edit**. A list of available countries will be displayed (both toll and toll-free). Check the box next to your selections. Click OK to close the box and **Next** to continue.
5. Click **Finish** to complete the setup and open Outlook.



### Conference Connect Toolbar & Meeting Ribbon

There are two places where the Conference Connect Outlook Add-In appears in Microsoft Outlook. It will appear as a toolbar and as part of the Meeting Ribbon selections when you open a meeting request or an appointment in your calendar.

#### Connect Toolbar

The Connect Toolbar will appear in your Mail and Calendar screens.

- Connect** - Connect to your conference instantly as a host.
- Schedule Meeting** - Schedule a meeting that already has your conferencing information populated in the Meeting Request.
- Setup** - Configure your conference settings for Outlook. Make changes to your account, subscription or create new ones at any time.



- ❑ **My Portal** - Open your conferencing portal in a separate window to view and manage information specific to your conferencing subscription.
- ❑ **Help** - Get help for the Connect Add-In for Outlook.

## Connect Meeting Ribbon

The Connect Meeting Ribbon will appear in a new meeting request or appointment.

- ❑ **Connect** - Connect to your conference instantly as a host.
- ❑ **Subscription Details** - Select different conferencing subscription details to use for a Meeting Request. You can also set up a different meeting template for the same subscription information.
- ❑ **Dial-In Numbers** - Customize the list of dial-in phone numbers to display in a specific meeting request.
- ❑ **Audio** - Add or remove audio conferencing information for a specific meeting request.
- ❑ **Web** - Add or remove web conferencing information for a specific meeting request.

## Host: Connect to your meeting using the Connect Toolbar or Meeting Ribbon

1. Click on the **Connect** button on the Connect Toolbar or Meeting Ribbon. A new browser will open.

2. Enter **Your Name** if it is not already populated.
3. Enter the Access Code, Conference Phone, and Passcode if this is your first time to the page. To save the information, enter a name and click **Save**. Otherwise, choose the **Access Code** from the Access Code drop down menu or select **Add New Access Code** from the drop-down menu to add a new Access Code.
  - If adding a new Access Code, enter the Access Code, Conference Phone number, Passcode, a name/description such as "My Access Code", and click **Save**.
4. Enter the Phone Number if this is your first time to the page. To save the information, enter a name and click **Save**. Otherwise, choose the phone number you want to call from the **Phone Number** drop down menu or choose **Add a new phone number**.

- If adding a new phone number, enter the phone number you want to call, enter a description such a "mobile phone", and click **Save**. If you have enabled cookies on your computer, your phone numbers will be saved.
5. Click **Call Me & Start Web Meeting**
  6. Once you have followed the steps above, the system will connect you to your conference. When you answer, you will hear an automated message.

### Switching from joining as a Chairperson to joining as a Participant

1. If needed, click the **Join** tab to change your status for the conference from the Chairperson to the Participant.
2. Enter **Your Name** if it is not already populated.
3. Choose the **Access Code** from the Access Code drop down menu or select **Add New Access Code** from the drop-down menu to add a new Access Code. If adding a new Access Code, enter the Access Code, Conference Phone number, a name, and click **Save**.
4. Choose your phone number you want to call from the **Phone Number** drop down menu or choose **Add a new phone number**. to add a new phone number, choose the country for your phone number, enter the number in the **New Phone Number** field, and enter a description such a "mobile phone". If you have enabled cookies on your computer, your phone numbers will be saved.
5. Click **Call Me & Start Join Meeting**
6. Once you have followed the steps above, the system will connect you to your conference. When you answer you will hear an automated message.

### Participant: Connect to your meeting using the "Join Now" link

1. Click the **Join Now** link to automatically be connected to the audio and web conference. A new browser window will open. If a new window doesn't open, you can copy and paste the URL provided in the meeting request into a web browser.
2. Enter **Your Name** if it is not already populated.
3. Enter the Access Code and Conference Phone if this is your first time to the page. To save the information, enter a name and click Save. Otherwise, choose the **Access Code** from the Access Code drop down menu or select **Add New Access Code** from the drop-down menu to add a new Access Code.
  - If adding a new Access Code, enter the Access Code, Conference Phone number, a name/description such as "My Access Code", and click **Save**.
4. Enter the Phone Number if this is your first time to the page. To save the information, enter a name and click Save. Otherwise, choose the phone number you want to call from the Phone Number drop down menu or choose Add a new phone number.
  - If adding a new phone number, enter the phone number you want to call, enter a description such a "mobile phone", and click **Save**. If you have enabled cookies on your computer, your phone numbers will be saved.
5. Click **Call Me & Join Web Meeting**
6. Once you have followed the steps above, the system will connect you to your conference. When you answer you will hear an automated message.

### Switching from joining as a Participant to joining as a Chairperson

1. If needed, click the **Host** tab to change your status for the conference from the Participant to the Chairperson.
2. Enter **Your Name** if it is not already populated.
3. Enter the Access Code, Conference Phone, and Passcode if this is your first time to the page. To save the information, enter a name and click **Save**. Otherwise, choose the **Access Code** from the Access Code drop down menu or select **Add New Access Code** from the drop down menu to add a new Access Code.

- If adding a new Access Code, enter the Access Code, Conference Phone number, Passcode, a name/description such as "My Access Code", and click **Save**.
4. Enter the Phone Number if this is your first time to the page. To save the information, enter a name and click Save. Otherwise, choose the phone number you want to call from the **Phone Number** drop down menu or choose **Add a new phone number**.
    - If adding a new phone number, enter the phone number you want to call, enter a description such a "mobile phone", and click **Save**. If you have enabled cookies on your computer, your phone numbers will be saved.
  5. Click **Call Me & Start Web Meeting**
  6. Once you have followed the steps above, the system will connect you to your conference. When you answer, you will hear an automated message.

## WEB MEETING CONFERENCE CENTER

Logging in as chairperson brings up the Conference Center application. The Conference Center is where you schedule and organize web meetings, manage invitations and registrations, track participation and feedback, and launch your web meetings. You can also manage meeting recordings, set up podcasts of your recordings and view reports.

Technical Support | Logout

To start a meeting, select it from the list below and click "Open Meeting Controls". [View Past Meetings](#)

**Web Meeting**

- Home
- View Reports
- Manage Recordings
- Manage Contacts
- Settings
- Admin

**On-Demand Meeting**

- On-Demand Meeting  
[Participant Login Info](#)  
 Conference Phone Number: 800.555.1212  
 Access Code: 0000000

Scheduled Meetings	Date	Time	Invited	Confirmed	
<input type="radio"/> <a href="#">IR Q3 Meeting</a>	Wed, Feb 28, 2018	8:00 AM	0	23	<a href="#">Edit</a>

Page 1 of 1 | 10 | 1 Upcoming Meeting

**Open Meeting Controls** | **Schedule a Meeting** | Time Zone: Eastern Time (US & Canada)

[Request Web Event Services](#) | [Help](#)

### Home

- The Home link in the Web Meeting Conference Center menu displays the Conference Center home page for scheduling, managing and initiating meetings.
  - The home page lists the on-demand meeting option and scheduled meetings by date and time.
- The Open Meeting Controls button opens the chairperson conference controls window.
- The Schedule a Meeting button displays the initial page for scheduling a new meeting.
- The Time Zone drop-down menu sets and displays the default time zone.
- The View Past Meetings link shows a list of all past scheduled and cancelled meetings and provides options for performing post-meeting actions. This link is only visible if scheduled meetings have passed.

### On-Demand Meetings

- On-Demand meetings are held without being previously scheduled. Participants in on-demand meetings are not notified through the Conference Center, so they must be invited through other means.
- The Participant Login Info link in the On-Demand section of the home page displays a form with detailed meeting login information that you can copy and paste into an email to invite people to join the on-demand meeting.
- The Name field is always required. Enter a title for each additional field of custom registration data you want to collect (up to five) and check the box if you want to make it required information.
  - By default, this is also registration information that people must provide to access recordings.

- To conduct an on-demand meeting, choose the On-Demand Meeting option and then click on the Open Meeting Controls button.

To start a meeting, select it from the list below and click "Open Meeting Controls".

[View Past Meetings](#)

**On-Demand Meeting**

On-Demand Meeting  
[Participant Login Info](#)  
 Conference Phone Number: 800.555.1212  
 Access Code: 0000000

Open Meeting Controls

+ Schedule a Meeting

Time Zone: Eastern Time (US & Canada) ▼

- The Edit On-Demand Registration link in the On-Demand section of the home page displays a page for customizing registration information for on-demand meetings.

**Web Meeting**

Home

View Reports ▼

Manage Recordings

Manage Contacts

Settings ▼

Scheduled Meetings

On-Demand Meetings

Podcast Feed Settings

Admin

- [Request Web Event Services](#)
- [Help](#)

### Custom Registration

Use the form below to create up to 5 custom registration fields. Note that the "Name" field is always required. These fields are used for web conference participant registration and as the default registration for future recordings. Registration for individual recordings can be set in the Manage Recordings section.

Field Title	Required
Name <input style="width: 80%;" type="text"/>	☑
<input type="button" value="Add Field"/>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

## Scheduled Meetings

- Scheduled meetings are meetings that you set up in advance and invite participants to attend. Scheduling a new meeting is a two-step process:
  - Enter meeting details.
  - Send meeting invitations via email, Facebook or Twitter.
- Conference Center offers a number of emails and web pages for communicating with invitees, registrants, and participants before and after a meeting. You can preview and edit any of these options when you schedule a meeting.
- When scheduling a meeting that requires pre-registration, you can also set up marketing campaigns with unique registration links for inviting people to the meeting, and track those campaigns.
- After scheduling a new meeting, you can go back and edit any of this information prior to the meeting.

## Schedule a Meeting

To schedule a meeting, click the **Schedule a Meeting** button. This displays the first of two pages for entering information for the meeting.

The **Meeting Details** section is for setting up and entering the details of the meeting.

## Meeting Details

**Meeting Title:** \*

**Host(s):** \*  ?

**From Email:** \*  ?

**Date:** \*  31 (MM/DD/YYYY)

**Time:** \*   ▼

**Duration:** \*  :  (HH:MM)

---

**Registration Type:**  Register at time of meeting [Help me choose](#)  
 Pre-register before the meeting

▼

Notify me of new registrations via email

---

**Meeting Type:**  Web & Audio  Audio Only  Web Only

---

**Audio Type:**  On Demand Conference  Other [Help me choose](#)

**Dial-In Number(s):** \* ?  
 800.555.1212 U.S. & Canada Toll-Free  
 303.555.1212 U.S. Toll

[Add International Numbers \(Optional\)](#)

**Access Code:** 0000000

---

**Description:**  
Limit 2000 characters

**B** *I* U | | | Font Family Font Size A ▼

---

**Security**

Set security passcode for web meeting ?

- Meeting Title: Give a descriptive title for the meeting.
- Host(s): List one or more hosts for the meeting. The name(s) you provide as hosts are included in emails to invitees and registrants.
- From Email: Enter the email address of the meeting organizer. This is the reply-to-address in emails Conference Center sends to invitees and registrants. Invitees can reply to this email address if they want more information or have questions about the meeting. This is also the address where Conference Center sends email notifications. The Web Meeting account holder's email address is the default.
- Date: Enter the date of the meeting in MM/DD/YYYY format or use the calendar icon to select a date.
- Time: Enter the time of the meeting or use the clock icon to select a time in 15-minute increments. Choose a time zone from the drop-down list, if different from the default set in the Conference Center home page.
- Duration: Enter an expected duration for the meeting. The actual meeting can end earlier or later; the duration is just to help participants schedule their time.

## Registration Type:

- Register at the time of meeting: Choose this option if you do not want to collect and track registrants in advance. Invitees register when they join a meeting.
- Pre-register before the meeting: Choose this option if you want to confirm/deny registrants and track registrants in advance. Invitees must register prior to the meeting.
- Notify me of new registrants via email: If you choose to have invitees pre-register for the meeting, this option allows you to be notified by email as they register.
- The Help Me Choose link provides additional information if you are not sure when invitees should register.

## Meeting Type:

- Web & Audio: Choose this option if the meeting is both web and audio.
- Audio Only: Choose this option if the meeting is audio only.
- Web Only: Choose this option if the meeting is web only.

## Audio Type:

- **On-Demand:** Choose this option if you do not need a Web Meeting operator or other assistance for the meeting and the meeting will have no more than 96 attendees (or up to 150, depending on account settings).
  - **Dial-in Numbers:** Check the box to include your U.S./Canada toll-free number and/or your U.S. toll number for the meeting. If you plan to invite international participants and know which countries from which they will be calling, click the Add International Numbers (Optional) link to select the individual international numbers for these countries. If you aren't sure which countries from which they will be calling, check the box to include a link to the list of all international toll free numbers.
  - **Access Code:** Your Web Meeting access code is automatically included in the information for this meeting.
- **Operator Assisted:** Choose this option if the meeting has over 96 participants (or up to 150, depending on account settings) or you need operator services during the meeting. If you select this option, you are instructed to call Web Meeting to set up your meeting and provide you with dial-in numbers depending on your meeting requirements. The numbers you enter are included in meeting communications.
  - **Enable broadcast audio:** Check this box if you want to broadcast the audio portion of your web meeting over the Internet. Call Web Meeting for a broadcast audio code to enter.
  - **Display dial-in number during conference:** Check this box to display a number during the meeting for participants to use if they prefer to dial in rather than listen to the broadcast audio. The first dial-in number you entered above is automatically copied into this text box.
- **Description:** Enter a description for the meeting (up to 2000 characters). This description appears in all communications for the meeting.

The **Security** section of the page provides the option to include a security passcode that participants must enter to join this web meeting.

- **Set security passcode for web meeting:** Check this box if you want to include a security passcode unique to this web meeting. Enter a security passcode. This passcode is automatically included in the invitation, confirmation, update, and reminder emails, as appropriate.
- Click the **Save and Next** button to display the second page for scheduling a meeting.

The **Next Steps** section of this page is for preparing and sending out invitations and updates for the meeting, and adding the meeting to your calendar.

- The **Send Invitations** button sends an invitation email automatically generated from the meeting information you have entered. This button displays a form for entering email addresses manually, or uploading a .csv file with up to 2,000 addresses (or up to 10,000, depending on account settings). If you have previously set up one or more marketing campaigns, you can select a campaign to track registration separately for this group of invitees.

- The **Facebook** icon provides options to post a meeting notice to your Facebook page or another Facebook page. The post includes meeting details along with a link to either register for the meeting or to join the meeting, depending on the meeting registration type. You can add a note or edit the meeting details before posting the meeting notice.
- The **Twitter** icon posts a meeting notice to your Twitter page with a link to either register for the meeting or to join the meeting, depending on the meeting registration type. You can edit the meeting notice before tweeting it to your followers.
- The **Preview** link displays the invitation email as invitees will see it.
- The **Edit** link lets you add a custom message to the invitation email and attach up to five files for recipients to download.
- The **Send Update** link sends an update email for the meeting to all confirmed registrants or invitees, depending on registration type. You can add files and a custom message to the update.
- The **Upload Confirmed Attendees** link lets specified invitees bypass the registration process for meetings that require pre-registration.
- The **Add to your Calendar** button adds the meeting to your default calendar client.
- The **Lotus Notes Help** link provides information for adding the meeting to a Lotus Notes® calendar.
- The **Advanced Settings** section of the page lets you preview and edit various meeting communications sent to invitees, registrants and participants before and after a meeting. Click the **Show Advanced Setting** link to show these options and the **Hide Advanced Settings** link to hide them.

## Registration

Various communications are used during the registration process as invitees register and are confirmed or declined. The registration form is what invitees see when they register for the meeting.

- Click the **Edit** link to edit the form.
  - **Custom Message:** You can replace the default message with a custom message and change its format.
  - **Standard Questions:** Check the Include box next to each standard question you want to display on the registration page. Check the Required box next to each included question to make it a question that registrants must answer in order to register. Name and Email are always included and required.
  - **Custom Questions:** The custom questions you create are shown here. Each custom question has an Edit and Delete button so you can modify and remove it.
- The **Add Custom Question** button brings up a form to create a custom question.
- For meetings requiring pre-registration, the **Registration Confirmation Email** is the email registrants receive confirming their registration. Click the Edit link to **edit** the email.
- For meetings requiring pre-registration, the **Registration Declined Email** is the email registrants receive if you manually decline their registration. Click the **Edit** link to edit the email.
- **Custom Message:** You can replace the default message with a custom message and change its format.
- **Files Available for Download:** You can attach up to five files for recipients to download.

## Reminder Email

You can schedule a meeting reminder email to send automatically to all confirmed registrants or invitees, depending on the meeting type.

- Click Add Reminder Email link to set up and edit the reminder email.
  - When should this email be sent? By default, the reminder date and time is 24 hours before the meeting. If the meeting start time is within 24 hours, the reminder date and time is two hours before the meeting. Use the default date and time or specify a different date and time for the reminder email to be sent.
- Custom Message: You can replace the default message with a custom message and change its format.
- Files Available for Download: You can attach up to five files recipients to download.
  - Make sure to click the Save button when you are done. Otherwise, the reminder email does not get scheduled

- Once you add a reminder email, use the Preview, Edit, and Review links to view, modify, or cancel it.
  - If you want to send more than one reminder email, you can schedule an additional reminder after the first one has been sent.

## Post-Meeting Emails and Web Pages

You can send out post-meeting emails after a meeting has taken place. Different post-meeting email options are available based on the type of meeting. The Post-Meeting Email is for audio-only meetings. The Post-Meeting Email to Attendees and the Post-Meeting Email to No-Shows are for web and audio and web-only meetings. The content of all three of these emails is similar.

- Click the **Edit** link to edit the email.
- **Custom Message:** You can replace the default message with a custom message and change its format.
- **Add Recordings:** You can attach archived recordings for recipients to play back.
- **Files Available for Download:** You can attach up to five files for recipients to download.
  - Post-meeting emails are not automatically sent after a meeting takes place. To send them, view the meeting to see the post-meeting actions. If you want to attach recordings and files to post-meeting emails, don't forget to do so before you send them.
- The **Post-Meeting Survey Page** is displayed after the web portion of the meeting. Click the Edit link to edit the page.
- Check the **Send attendees to a custom URL** box if you want to bypass this survey page and direct attendees to the URL of your choice.
- **Post-Meeting Survey Form:** Choose whether to include the standard question and, if you want, create your own questions by selecting the Add Custom Question button.
- The **Post-Meeting Archive Page** is displayed when someone attempts to register for, or log into a meeting that has already taken place. The content is similar to the Post-Meeting Email.

## Meeting Promotion Tools

For scheduled meetings requiring pre-registration, you can promote your meeting and track registrations from various marketing campaigns.

- **Marketing Campaigns:** You can generate unique URLs to the meeting's registration page to use in online marketing campaigns and track the registrants driven from those campaigns. You can see the effectiveness of each campaign when you view the campaign report for your meeting. Click the Manage link to set up one or more marketing campaigns.
- **Campaign Name:** Enter a campaign name. Names must contain only letters, numbers, spaces, and periods. Special characters are not allowed. Click the Generate URL button to generate a unique URL for this campaign. Repeat for each campaign you want to create and track. A default campaign named "Default" is automatically created for the meeting.
- **Campaign URLs:** The campaign names and associated URLs are displayed in this window. Copy the URLs to use in your campaign banner ads, web pages, email, blogs, etc.
- **Delete:** To delete a campaign, click the delete link next to its URL. You cannot delete the default campaign. If you attempt to delete a campaign that already has registrants associated with it, you are prompted to confirm the deletion and then those registrants are re-associated with the default campaign. Registrants who use a link for a deleted campaign (in an email or on a web page, for example) are associated with the default campaign.

## Manage Scheduled Meetings

- Once a meeting has been scheduled, you can view, edit, and clone the meeting information. Click the **Home** link in the Web Meeting menu to go to the Conference Center home page, and click on the meeting title of the meeting you want to manage.
- The **Open Meeting Controls** button opens the chairperson Conference Controls window.
- The **Edit Meeting** button displays the information you entered when you scheduled the meeting and allows you to edit it. You can also edit a meeting by clicking on the Edit link after the meeting title on the Conference Center home page.
- The **Clone Meeting** link copies the information to use as the basis for scheduling a new meeting.
- The **Cancel Meeting** button cancels the meeting and lets you send cancellation emails to all confirmed registrants or invitees, depending on meeting registration type.
- The Send Invitations and Add to your Calendar buttons, the Facebook and Twitter icons, and Preview, Edit, Send Update, Upload Confirmed Attendees, and Lotus Notes Help links work the same as in the scheduling a meeting section of this user guide.
- The View Past Meetings link on the Conference Center home page shows a list of all past and cancelled meetings.

## Clone and Reschedule Meetings

**Open Meeting Controls** **Edit Meeting** **Clone Meeting** **Cancel Meeting**

**Meeting Details**

**Meeting Title:** IR Q3 Meeting  
**Host(s):** Host Name  
**From Email:** host@mycompanyname.com  
**Date & Time:** Tue, Jul 9, 2019, 11:00 AM Eastern Daylight Time  
**Meeting Type:** Web & Audio

- Any scheduled, past, or cancelled meeting can be "cloned" and used as a basis for creating a new meeting. When you clone a meeting, the information for that meeting is copied for you to edit to create a new meeting.
- To clone a meeting, click on the **Clone** link for the meeting in the list of past meetings or the Clone button at the top of the window when you view a past or scheduled meeting. This displays the same initial page as scheduling a meeting. Edit the meeting information as necessary, make sure to change the meeting time and date and send out invitations. Once you finish, the cloned meeting is added to the list of scheduled meetings.
  - **NOTE:** If the original meeting has operator-assisted audio and you want the cloned meeting to have operator-assisted audio as well, contact Web Meeting to schedule operator services and obtain new dial-in numbers before you send out invitations.
- Past meetings can be "rescheduled," allowing you to repeat the meeting at a later date. When you reschedule a meeting, the meeting is moved back to the list of scheduled meetings with a new time.
- To reschedule a meeting, click on the **Reschedule** link for the meeting in the list of past meetings or the Reschedule button at the top of the window when you view meeting details. In either case, this displays a form for you to enter a new date and time.
- If the original meeting had operator-assisted audio, a message notifies you to modify the operator-assisted information. When you click the **Reschedule** button on this form, you have the option of notifying all confirmed registrants or invitees from the previous meeting, depending on the meeting registration type, that the meeting has been rescheduled.

## View Reports

Conference Center creates a variety of reports to help you analyze and manage your web meetings and audio conferences. The View Reports link in the Web Meeting menu displays a submenu of links to these reports.



### Meeting Reports

[View Upcoming Meetings](#)      << first   < 1 - 20   21 - 40   41 - 60 >   last >>

Meeting Name	Start	End
<a href="#">On-Demand Meeting</a>	Jun 14 2017 4:06 PM	Jun 14 2017 4:07 PM
<a href="#">On-Demand Meeting</a>	Jun 14 2017 8:05 AM	Jun 14 2017 8:55 AM
<a href="#">On-Demand Meeting</a>	Jun 08 2017 3:14 PM	Jun 08 2017 3:15 PM
<a href="#">On-Demand Meeting</a>	May 23 2017 1:28 PM	May 23 2017 1:29 PM
<a href="#">On-Demand Meeting</a>	Apr 27 2017 4:29 PM	Apr 27 2017 4:36 PM

## Meetings

- The Meetings link lists all past meetings, including on-demand meetings. (The View Reports link also displays this list by default.) Above the list of past meetings is a View Upcoming Meetings link that lists all scheduled meetings.
- Click on a meeting to view the reports for that meeting. This displays a page with meeting details, post-meeting actions, and links to various reports for the meeting. This is the same information that is displayed when you use the View Past Meetings link on the Conference Center home page and click the Details link for the meeting.
- The Meeting Details section displays the basic details of the meeting. The Registration link shown in this section is the URL of the archive page for the meeting. You can copy this URL into any email, web page, blog, etc. for people to see the archive web page for this meeting. If you set up one or more campaigns for the meeting, the View Campaign URLs link displays a list of the campaign names and their associated URLs.
- The Post-Meeting Actions section provides links to preview, edit, and send post-meeting emails, and to preview and edit the post-meeting archive web page for the meeting. These are the same post-meeting actions shown in the Advanced Settings when you schedule or edit an upcoming meeting.
- The Reports section includes links to various reports for the meeting for you to view and download. The Registration Reports include the following, depending on the registration type for the meeting:
  - The Invitee List link displays the list of invitee email addresses and when they were invited.
  - The Registration Details link displays registration information for the registrants, along with their attendance status.
  - The Campaigns link displays statistics for the marketing campaigns you set up to track registration.
- The Web Conference Reports include the following, depending on the type of meeting and how it was conducted:
  - The Web Participants link displays a list of participants for the web meeting. The list includes the times each participant joined and left the meeting and the total number of minutes they attended the meeting. Each participant's name is a link to registration and post-meeting survey information provided by that participant.
  - The Chat link displays a transcript of the chat messages during the meeting, the time each message was sent, and its sender and recipient.
  - The Poll Results link displays the polls conducted during the meeting with a summary of responses to each poll as well as the response of each participant who took the poll.
  - The Post-Meeting Survey link displays the information provided by the meeting participants who responded to the post-meeting survey.

## Recordings

- The **Recordings** link lists your archived recordings. Each recording in the list shows the start and end time of the recording and the number of playbacks. You can also view and save the playback report for each recording.
- The **Audio** link lists past audio conferences by conference ID along with start times, duration, and participant count. You can view and download the audio participant list for any audio conference. The list shows each participant's phone number, entry and exit times, how long he or she was on the call, and audio type.

## Opt-Out

- The Opt-Out link lists the email address for invitees who have chosen to opt out from receiving meeting invitations. They can opt out when they are invited to register for, or join a scheduled meeting. If you attempt to send subsequent meeting invitations to email addresses that are in the opt-out list, you receive a message that those emails are in the opt-out list.
- When you view the opt-out list, you can select email addresses from the list and send an opt-in request.
  - **NOTE:** The opt-out list only applies to a single web conferencing subscription. If you have multiple subscriptions, recipients must opt-out from each subscription from which they do not want to receive invitations.

## Manage Recordings

The **Manage Recordings** link in the Web Meeting menu provides options for working with your archived recordings. When you archive your recordings, you get unlimited playbacks and access to additional features for managing and sharing your recordings. Or, you can download your recordings in up to four industry-standard formats and host them on your own server.

- **NOTE:** If you prefer to host a recording on your own server, be sure to download the recording file and delete it from Conference Center on the day of your meeting to avoid incurring Web Meeting archiving fees.

**Web Meeting**

- Home
- View Reports
- Manage Recordings**
- Manage Contacts
- Settings
- Admin

**Manage Recordings**

Delete Selected

Total Recordings: 1 << first 1 - 1 last >>

	Title	Date	Duration	Playbacks
<input type="checkbox"/>	<a href="#">▶ Sample Recording</a>	Jul 9, 2017 9:04:01 AM	00:01:17	0

All times are Mountain time zone. (UTC -0600)

## Recordings

The Recordings links lists all of your archived recordings (The Manage Recordings links also displays this list by default).

- To delete one or more recordings, check the box next to the recording names and click the **Delete Selected** button.
- To work with an individual recording, click its name or the arrow next to the name to expand the recording in the list.
- The playback window lets you play back the recording with the Manage Recordings page. The **View Larger** link displays the recording in a larger pop-up window.
- Under the **Manage** section:
  - The **Rename** link displays a form for renaming the recording.
  - The **Edit** link brings up a new browser window with options for editing the recording.
  - The **Download** link allows you to download the recording from Web Meeting server and store it locally on your computer. The link displays a form to choose a download format for the recording.
  - The **Delete** link deletes the recording.
  - The **View Report** link displays the playback report for the recording and a Download button for downloading this information.
  - Check the **Enable Registration** box to require people to enter registration information before playing the recording. The **Edit** link lets you change the registration information for this recording only. By default, the playback registration form contains the information you set up for on-demand meeting registration.
  - Check the **Notify Me of Playbacks** box to send an email to the Web Meeting account holder when a recording is played.
  - Check the **Require Passcode** box to require people to enter a passcode to access the recording.

- Under the **Share** options:
  - The **Show Playback URL** link displays the link to play back the recording. You can copy this link and paste it in blogs, documents, and other communications. If you enable playback registration, people must complete the registration form before playing the recording.
  - The **Email Playback URL** uses your default mail client and composes an email for you to send with the link to play back the recording.
  - The **Post to Twitter** link automatically creates a tweet with the recording title and the recording playback link, and allows you to quickly post it to your Twitter page.
  - Check the **Add to Feed** box to add the recording as an episode to your podcast feed. The Edit link lets you change options for this episode only; it does not change your podcast feed settings.
  - The **Facebook Options** link provides options to embed a recording for playback on your Facebook page or another Facebook page. You can also add a note or edit the recording title or description before posting it. You must first add the recording to your podcast feed to enable this option.
  - The **Embed in Web Page** link displays the HTML code for embedding a recording for playback on a web page or blog. Choose the playback size you want and then copy the code to paste into your web page. You must first add the recording to your podcast feed to enable this option.

## Edit Recordings

- The **Edit** link in the expanded view of a recording displays the Recording Editor window.
- Editing a recording involves creating cut points to indicate which sections of the recording to remove. To create one or more cut points:
  1. Play the recording until it reaches the start of a section you want to remove.
  2. Enter the time indicated by the counter in the control bar below the recording into the Start fields of the Create Cut Point panel to the right.
  3. Repeat these steps for the End fields.
  4. Click the **Add Cut Point** button to add the point to the list of cut points.
  5. Repeat these steps to create additional cut points for the recording.
- When you have created all the cut points you want, click the **Make Cuts** button to remove them from the recording. This may take a few minutes.
- The edits you make to a recording are not permanent. You can restore individual cuts or revert to the original with the **View Past Cuts** link. This displays a window that lists all the cuts you have made to the recording.
- Select a cut to see its start and end times. Click on the Undo button to restore an individual cut. Click on the **Revert to Original** button to restore all cuts and go back to the original recording. Restoring cuts may take a few minutes.
- When you are done editing your recording, click the **Exit** button to close the Recording Editor window.

## Podcast Feed Settings

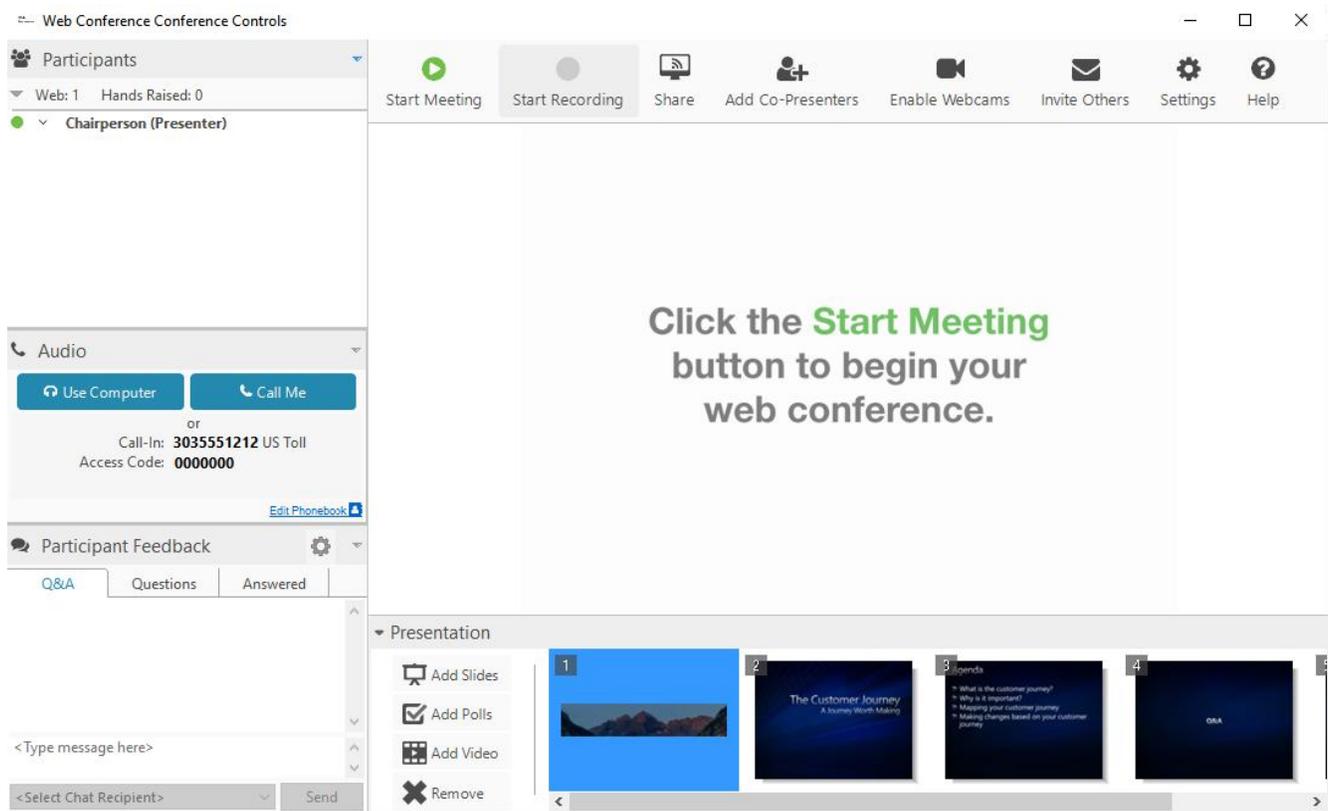
- You can automatically distribute your recordings archived with Web Meeting as podcasts through the podcast feed provided with your Web Meeting subscription. The Podcast Feed Settings link in the Manage Recordings menu allows you to publish the podcast feed and customize the feed settings.
- To customize the podcast feed settings, begin by checking the Publish Podcast box at the top of the page to publish your feed. Then, customize the settings:
  - **Title:** Give a title for your podcast feed.
  - **Subtitle:** Include a subtitle, if you want.
  - **Description:** Enter a description that explains what your podcast feed is about.
  - **Author:** Give the name of the podcast feed's author. This may be different than the podcast feed's owner.
  - **Owner Name:** Give the name of the podcast's feed owner. By default, this is the Web Meeting account holder.
  - **Owner Email:** Enter the podcast feed owner's email address.
  - **Copyright:** Enter the copyright date of the podcast feed.
  - **Your Website:** Include the URL of your website.
  - **Categories:** Select one or more category and subcategory to help subscribers find your podcast feed. Click the **Add Field** button to include additional categories. Click the **Remove** button to remove a category.
  - **Keywords:** Enter keywords that describe your podcast feed to make it easier to find. Click the Add button to add keywords as you enter them. Select keywords you have entered and click the Remove button to remove them.
  - When you have entered the information, click the **Save** button at the bottom of the page to store the new feed settings.
- The My Podcast Page link at the top of the settings is a link to the subscription web page for your podcast feed. Provide this link to potential subscribers to walk them through the subscription process.
- To add a recording to your podcast feed, choose the **Manage Recordings** link in the Web Meeting menu, select the recording, and check the Add To Feed box.

## Manage Contacts

- You can add and delete contacts from your Web Meeting phonebook with the Manage Contacts link in the Web Meeting menu. In the Conference Controls, you can use the phonebook to dial out to contacts. In addition, audio conference participants are listed by name in the Conference Controls participants panel if the phone number they call from matches their name in the phonebook.
- Click the Upload Contacts button to upload contacts from a .csv file.
- Download and use the Contacts Template .csv file to enter the names of the contacts you want to upload along with their contact information. .Csv files exported from Outlook can also be uploaded without any modifications to their headers. You can have up to 2,000 contacts in your phonebook.
  - **NOTE:** To add individual contacts directly from the phonebook, enter them in Conference Controls.
- To delete individual contacts, select the boxes next to the names you want to delete and then click the **Delete Selected** button. Click the **Delete All Contacts** button to remove all contacts from the phonebook.

## Web Meeting Conference Controls

Opening meeting controls from the Conference Center displays the Conference Controls window for conducting and managing a meeting. The Conference Control screen is your main console for managing your conference. All the features of the Web Meeting service are available through this console.



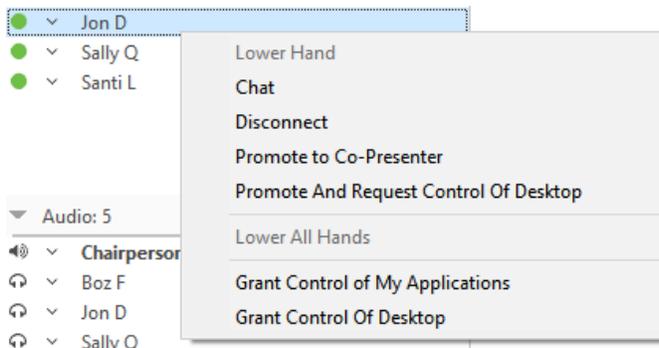
## Participants Panel

The Participants Panel lists all participants who have joined the meeting, including the chairperson. Web meeting participants are listed under the Participants heading and audio conference participants are listed under the Audio Controls heading.



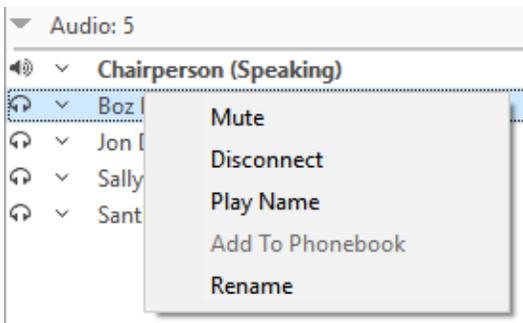
- Participants are listed as they join the meeting. If they join before the meeting has started, they are listed as being in the lobby.
- For on-demand meetings, passing the cursor over a participant displays the registration information for that participant.

- Clicking the right mouse button on a web participant brings up a menu of options for that participant.



- Lower Hand lowers the participant's hand if it is raised.
- Chat opens a separate window for the chairperson and co-presenters to chat with the participant.
- Disconnect removes the participant from the meeting.
- Promote to Co-Presenter makes the participant a co-presenter. A meeting can have multiple co-presenters. Co-presenters have access to all the same meeting controls as the chairperson and can do everything the chairperson can do except appoint other co-presenters, disconnect the chairperson or other co-presenters, or manage the audio conference controls.
- Lower All Hands lowers all participants' hands that are currently raised.
- Grant Control of My Applications grants control of selected applications to another participant or co-presenter. Until control is revoked, the grantor and grantee share control of the applications.
- Grant Control of Desktop grants control of the desktop to another participant or co-presenter. Until control is revoked, the grantor and grantee share control of the desktop.

- Clicking the right mouse button on a web participant brings up a menu of options for that participant.



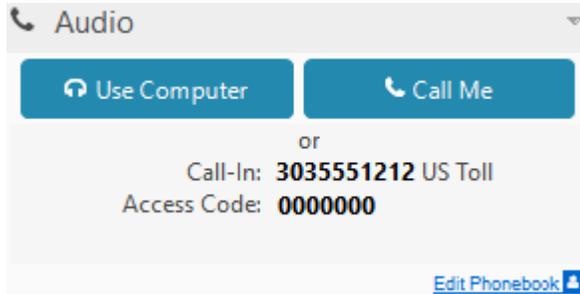
- Mute/Unmute mutes or unmutes the participant's phone line. Participants can mute and unmute themselves, as well, using their phone keypad if they are participating in the audio portion of the meeting from their phone or the options in the interface if they are using their computer.
- Disconnect disconnects the participant from the audio conference.
- Play Name plays back the participant's name. Names are only available for playback if the Name Record option is set.
- Add to Phonebook displays the new entry dialog to enter the participant in the phonebook.
- Rename allows you to replace the listed number or name for the participant with a new name.

## Audio Controls Panel

The Audio Controls panel provides controls for managing an audio conference. Only the chairperson has access to the audio controls.

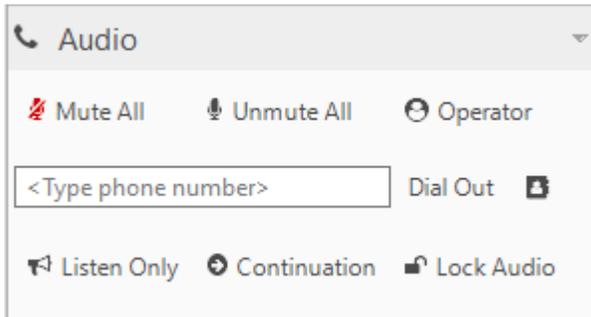
To start an audio conference from the Audio Controls panel:

1. Click the **Call Me** button. This displays the Call My Phone dialogue.



2. Enter the phone number of the phone you will be using for the audio conference, beginning with the area code. Enter only numbers; spaces and special characters are ignored.
3. If you are outside the United States or Canada, choose the country where you are located from the drop-down list.
4. Click the **Call My Phone** button. When your phone rings, answer it and follow the verbal prompts to join and start the audio conference.

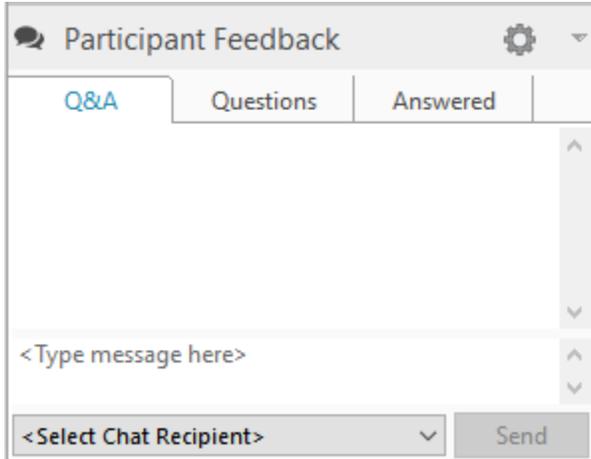
After the audio conference has begun, the Audio Controls panel displays the audio controls:



- **Mute All** mutes all participants. You can mute individual participants in the Participants Panel.
- **Unmute All** unmutes all participants. You can unmute individual participants from the Participants Panel.
- **Operator** displays a dialog to speak with an operator in private, or invite the operator to join the conference. When you request an operator, the Operator button changes to a Cancel button so the request can be cancelled if necessary.
- The **Phone Number** text box allows you to enter a phone number to dial out and add a participant to the conference. Special characters and spaces in the number are ignored, but the area code is required. A "011" prefix is required for phone numbers outside the United States and Canada.
- The **Phonebook** icon displays the Phonebook window to manage phonebook entries.
- **Dial Out** dials out to the number entered in the text box. Your conversation is private until you admit the person to the conference.
- **Listen Only** makes the conference a listen-only conference. You can unmute individual participants but participants cannot unmute themselves.
- **Continuation** continues the audio conference after the chairperson has disconnected from the call.
- **Lock Audio** locks the audio conference and prevents new participants from joining. However, you can still dial out and add participants to the conference.

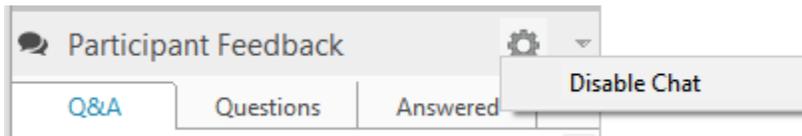
An audio conference ends when the chairperson disconnects, or in continuation mode, when the last participant drops.

## Q&A and Chat Panel



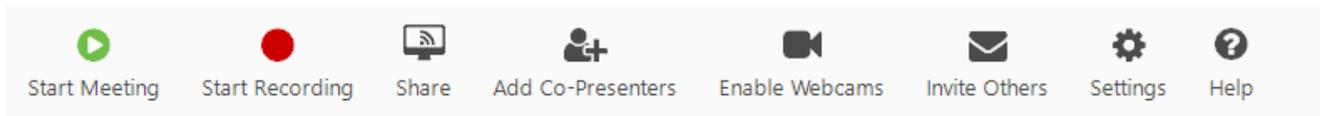
There are three different tabs in the Chat panel that the chairperson, co-presenters can use to communicate with one another and participants during a live web meeting.

- The **Q&A/Chat** tab is where all the comments can go that are not in the form of a question.
  - The **Questions** tab will be populated with all chat messages that participants "Flag as Question."
  - The **Answered** tab populates with all Questions flagged as "Answered."
- The new setting cog will have an option to **Enable / Disable** chat, depending on current state.



- To disable chat during a meeting, click on the link at the top of Chat panel.
    - o While chat is disabled, participants' chat panels disappear.
    - o While chat is disabled, the **Enable Chat** link enables chat and redisplay participants' chat panels.
- The main part of the Chat panel shows a record of all chat messages. To send a chat, first select a recipient from the drop-down list at the bottom of the panel. Messages can be sent to all participants, to all co-presenters, or to individual participants or co-presenters. Selecting a recipient displays a one-line text entry box to type the message. To send the message, click the Send button.

# WEB MEETING MANAGEMENT CONTROLS



## Start / Stop Meeting

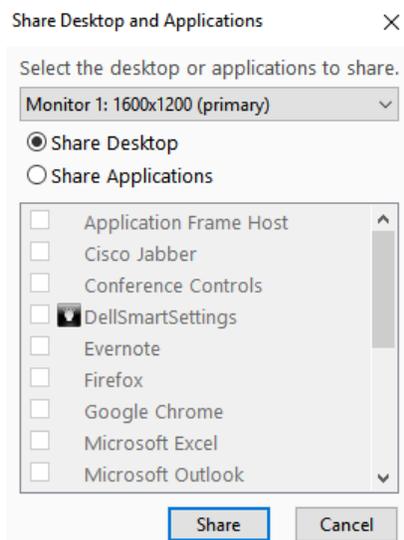
- The **Start Meeting** icon starts a web meeting. For on-demand web meetings, the Conference Security Passcode dialog appears, if enabled by options settings. This lets the chairperson set an optional security code that participants are required to enter to join the meeting.
- If an optional security passcode is used, it is only in effect for that meeting.
- During a web meeting, click the **Stop Meeting** icon to end the meeting.

## Record / End Meeting

- The **Start Recording** icon (greyed out until the meeting has been started) records a meeting. The recording includes everything participants see and hear during the meeting, including slides, polls, and shared applications. The webcam stream is not recorded. The web portion is synchronized with the audio portion of the meeting in the recording. The Recording Name dialog lets you name the recording.
- You can access, manage, and edit recordings from the **Manage Recordings** link in the Conference Center.
- Click the **End Recording** icon at any time during a meeting to end the recording.

## Share Applications or Desktop

- The **Share** icon shares specific applications on your desktop or your entire desktop with meeting participants.



- The **Share Desktop** icon shares your desktop with meeting participants so that you can demonstrate actions or show content in other windows. The Conference Controls window goes away and is replaced with the **Sharing Control Bar** (more details below).
- To stop sharing your desktop and return to the Conference Controls window, click the green icon on the left of the **Sharing Control Bar**.
- The Share Applications dialog that appears lists the applications currently running on your computer. You can select one or more of these applications to share. Participants see only the applications you select.
- You also have the ability to choose a secondary screen or monitor to share when desktop / application sharing.

## Grant Control

- To grant control to a participant, the participant must be promoted to Co-Presenter.
- The Grant Control option in the right click menu grants controls of the individual applications or your entire desktop to a meeting co-presenter.
- The Grant Control dialog that appears provides a choice between granting control of your entire desktop or selected applications. Applications currently running on your computer are listed in the left pane and participants are listed in the right pane.
  - To grant control of your entire computer, choose **Grant Control of Desktop** and then select a participant from the list of participants.
  - To grant control of individual applications, choose **Grant Control of Selected Applications**, select one or more applications for the list of applications, and then select a participant from the list of participants.

## Sharing Control Bar



- The Sharing Control Bar appears whenever you share applications or grant control of the desktop or individual applications, temporarily replacing the Conference Controls window.
- Click and hold the **ellipses** on the far left of the bar to drag it to a new location on the screen. The control bar appears horizontally when you drag it to the top or bottom of the screen, and vertically when you drag it to the left or right. It also snaps to the edges of the screen.
- The **Left Arrow**  icon ends sharing or control and returns to the Conference Controls window in slide sharing mode.
- The **Record**  icon starts or stops recording the meeting.
- The **Pause**  icon pauses sharing. Once paused, the participants will continue to see what was last shared on the screen until the "play" button is selected.
- The **Share**  icon allows you to share individual applications or your desktop with meeting participants.
- The **Participants**  icon displays a list of participants.
- The **Phone**  icon displays the audio control panel.
- The **Chat**  icon opens the chat controls.
- The **Annotate**  icon allows you to add emphasis or direct attention to the specific content you are sharing through the use of a highlighter, pen, and/or bullets.
- The **Help**  icon adds the text name of each button in the sharing control bar.
- The **Minimize**  icon minimizes the Sharing Control Bar. In Windows, double-click the Web Meeting tray icon in the task bar to redisplay it. In Mac OS®, right click the Web Meeting icon in the dock and select the Web Meeting Conference Controls option.
- To stop a meeting while sharing without returning to the Conference Controls window, click on the Web Meeting tray icon in the task bar and select the Stop Meeting option from the pop-up menu.

## Enable Webcams

- To start, click on the **Enable Webcams** button .
- Your webcam will automatically be shared, once you select **Enable Webcams**.
- Click the Settings icon to select a different webcam .
- To stop sharing your webcam, click the **Stop Sharing My Webcam** button .
- To disable the use of video for everyone, select the **Disable Webcams** button.

## Invite Others

- The Invite Others icon invites participants while a meeting is in session. This launches your default mail client with a default message that includes a link to the Participant Registration web page for the meeting. The Invite Others icon is only available for on-demand meetings.

## Options

The **Options** icon changes Web and Audio conference settings.

- **Web Options**
  - **Prompt for Security Passcode for Web Conference:** If checked, the Conference Security Passcode dialog appears when you start an on-demand web meeting, allowing you to set an optional security code that participants are required to enter to join a meeting.
  - **Show warning before sharing Desktop:** If checked, the Share Warning dialog appears when you share or grant control of your desktop.
  - **Sharing Performance:** Use the slider to control sharing performance. The higher the quality, the lower the speed, and vice-versa.
- **Audio Options**
  - The Entry Announcement settings control the announcement you hear.
    - o **Tone (future conferences):** Plays a tone when participants join and leave the conference (default).
    - o **Silent:** Participants join and leave the conference silently.
    - o **Name:** Participants are prompted to say their names when they dial into an audio conference and the names are announced as they join and leave the conference. This option is only available if you check the Name record option below.
    - o **Name record (current & future conferences):** Participants are prompted to say their names when they dial into an audio conference, regardless of the entry announcement mode setting. The chairperson can play back recorded names during an audio conference from the Participants panel.
    - o **Save settings for future conferences:** Saves the current Entry Announcement settings for future conferences
  - **Quick Start (future conferences only):** Allows the audio conference to begin before the chairperson arrives. The setting takes effect for future audio conferences only.
  - **Auto Conference Continuation:** Sets the default to allow audio conferences to continue even after the chairperson disconnects. The chairperson can turn continuation off during a conference from the Audio Controls panel or from the phone keypad.
- **Advanced Options**
  - **Enable Title Bar Button:** Choose this option to display the Sharing, Not Sharing, and Controlled buttons in application title bars when you share applications or grant control (default).
  - **Enable Application Sharing:** Choose this option to enable sharing and granting control of individual applications (default). If you change this setting, you must close and reopen the Conference Controls window for the change to take effect.

# WEB MEETING PRESENTATION CONTROLS



## Insert & Manage

### • Add Slides

- The Insert Slides icon uploads and adds slides or .pdf files to your presentation. This displays a dialog for you to navigate to the file with the slide(s) you want to insert. By default, slides are inserted after the currently selected slide or poll.
- Supported formats are: PowerPoint (.ppt), PowerPoint 2007 (.pptx), .jpg, .png, .gif, .jpeg and mp. PowerPoint presentations are converted to multiple slides and inserted. All other formats are inserted as single slides.
- You can have up to 200 slides or polls at any time per subscription, which remain until you delete them. If you attempt to insert more than this, the slides or polls exceeding the 200 limit are not inserted and a message is displayed to ask you to delete existing slides or polls to make room for the new ones.
- If you are uploading a .pdf file, a new slide will be created for each page of the .pdf file and will be able to be pushed just like a slide to the conference participants.

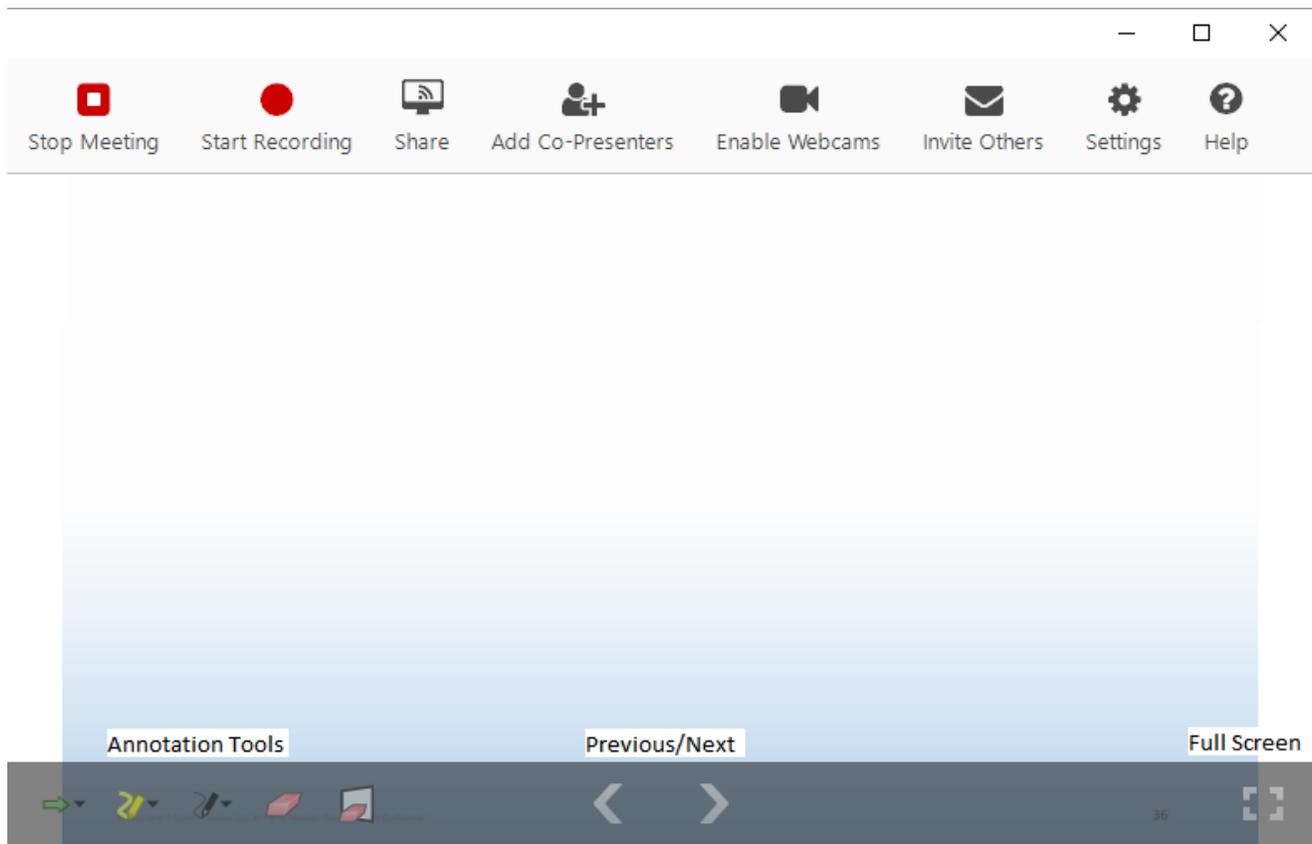
### • Add Polls

- The Insert Poll icon includes a poll in your presentation after the currently selected slide or poll. This displays the Poll Management dialog.
- You can insert a saved poll that was previously created or create a new poll to insert. To insert a saved poll, select the desired poll question from the list of Saved Polls and make sure the poll shown in the Poll Preview is the one you want. Then click the Insert button. The poll is inserted after the selected, or current, slide or poll. Polls can be inserted before or during a meeting.
- A poll consists of a question, a question type, and one or more responses. You can choose from six question types:
  - o **Yes/No:** The question requires a simple yes or no answer.
  - o **Multiple Choice/Single Answer:** The question requires participants to choose a single answer from one or more choices.
  - o **Multiple Choice/Multiple Answer:** The question requires participants to choose one or more answers from a variety of choices.
  - o **Text/Comments Box:** The question requires a written response.
  - o **Ranking Poll:** The question requires participants to rank a list of choices from 1 to where n is the number of choices. Each choice must be given a unique rank.
  - o **Opinion Poll:** The question requires participants to rate the relative importance of something from "Strongly Agree" to "Strongly Disagree" or "Not Applicable."

- The **New Poll** button in the Poll Management dialog displays the Create Poll dialog. Follow these steps to create a new poll:
  1. Compose the poll question in the **Question Text** box.
  2. Select a question type from the Question Type drop-down list.
  3. For all question types except Yes/No, Text/Comments, and Opinion Poll, enter one or more answers in the **Answers** text box. After entering each answer, click the **Add** button to add it to the list of answers displayed. To delete an answer, select it from the list and click the **Remove** button. Use the up and down arrow icons to reorder the list of answers.
  4. Click the **Save** button to save the poll. The poll is added to the list of saved polls for you to insert in a meeting presentation.
  5. To **edit** a saved poll, select it from the list of saved polls in the Poll Management dialog and click the Edit button. This displays the Edit Poll dialog, which is the same as the Create Poll dialog described above.
  6. To delete a saved poll, select it from the list of saved polls and click the **Delete** button.
- During a meeting, participants see only the poll and then optionally, the poll results. The chairperson and co-presenters also see a summary of responses. The results and response summary update continuously until the poll is closed.
- The chairperson and co-presenters can participate in the poll, or click the **Skip to Results** button to see the results of the poll.
- You can control whether or not participants see the poll results by checking or unchecking the **Display Results to Participants** box above the response summary. Click the **Close Poll** button to close the poll, or proceed to the next slide or poll. Once a poll is closed, participants can no longer submit responses. However, you can go back to a closed poll to show participants the results of that poll.
- **Add Video**
  - The **Add Video** icon allows you to upload a pre-recorded video into a live web meeting.
  - How to upload your video clip:
    1. In the Web Meeting Conference Controls, locate the Video button under the Insert and Manage section.
    2. In the dialog box that opens, click Add New Video.
    3. Locate the video or audio clip from your desktop you wish to upload and click Open.
      - o Supported file types are flv, mp4, mpeg, swf, wmv, mp3, wav, and wma.
      - o The maximum size of a video clip that can be uploaded is 100MB.
      - o You may keep up to 10 video clips in your video management library.
    4. Once the video clip is done processing, it is available for inserting into your presentation.
 

**NOTE:** Processing can take up to two hours, depending on video size and length. Please give yourself plenty of time to upload your video clip before your live meeting.
- **How to insert and play your video clip:**
  1. In the Web Meeting conference controls, locate the Video button under the Insert & Manage section.
  2. Locate the desired video and click Insert. The video will be available in the slide presentation at the bottom of your Web Meeting conference controls.
  3. The video clip will now be available in your slide presentation. You may click and drag the video clip thumbnail to the desired location within your presentation.
  4. To play the video clip for your participants, simply double click the video thumbnail in your slide presentation. The video clip will load briefly and then instruct you to click the play button to start your video (located on the lower left-hand corner of the playback window).
- **Remove**
  - The **Remove** icon deletes the currently selected slide(s) or poll(s). Deleted slides are removed permanently from your subscription. Deleting a poll removes it from the presentation, but the poll remains in your subscription until you delete it from the list of saved polls.

## Slide Control Bar



- **Annotation Tools**

- **Pointers**

- o The **Pointer** icon activates the current pointer for the slide. Choose from four different pointer styles. When you click with the pointer on a slide, an image of the pointer is left in that location.

- **Highlighters**

- o The **Highlighter** icon activates the current highlighter. Choose from three different colors. Click and hold the highlighter to highlight portions of the slide. The highlighter works like an actual highlighting pen, allowing text and graphics in the slide to show through.

- **Pens**

- o The **Pen** icon activates the current pen. Choose from four different colors. Click and hold the pen as you draw on the slide.

- **Erasers**

- o The **Eraser** icon erases individual markings on the slide. Position the dot next to the eraser on the marking you want to erase and click the left mouse key. The entire marking is erased.
    - o The **Erase All** icon erases all annotations and highlights on the slide.

- **Full Screen & Previous and Next Slide Button**

- These are all located at the top of the slide bar.

# ENHANCED VIDEO CONFERENCING

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## Overview

We have updated our video conferencing solution to support the move to HTML5 from Adobe Flash player. Using WebRTC technology we are providing HD video, no plugin required (for Chrome and Firefox), and a smoother video conferencing experience.

**Improvements:** HD video, up to six webcam feeds displayed simultaneously, active speaker rotation, less lag, more control over size of webcam feeds

**Limitations:** We recommend no more than twenty-five participants join your web meeting.

- There is no formal cap like with the old video conferencing solution. As many people can join your web meeting and see the webcam feed as you invite, but the more people that join and the more people that share will degrade your conference quality
- CPU intensive – We recommend that the user hardwire into their internet, plug into a power source, close unnecessary applications, and limit the participants joining their meeting and sharing webcams

## SYSTEM REQUIREMENTS

### Browsers:

Chrome - plugin free

Firefox - plugin free

IE 11+ with the Temasys plugin

Safari 9+ with the Temasys plugin

Note: webcam feeds are not available on mobile devices

### Webcams:

Most integrated webcams or USB webcams are supported. Mobile devices and H.323 based in-room video conferencing systems are not supported.

**Note:** The user must have a recording device (some sort of microphone) enabled on their machine in order for their webcam to be detected. See below for troubleshooting information if a webcam cannot be detected.

### Resolution size of webcam feed

We ask and attempt to display the video feed in 720p, but since the solution is dynamic, meaning it adjusts to the size of your browser window, this could change. Depending on which browser a user is logged into, the EVC panel will display the feeds slightly differently.

**Chrome:** We manipulate the webcam feed to fill up the entirety of a box. Depending on how many participants are sharing and how large your browser window is, these boxes will change size and dimension.

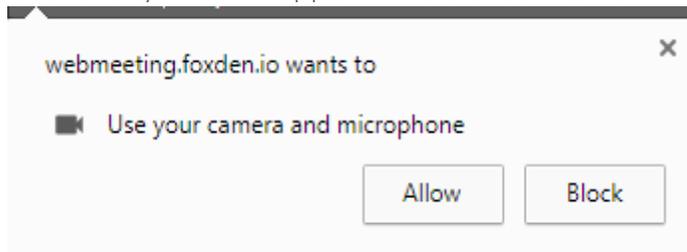
**Internet Explorer:** We present the entirety of the webcam feed in the EVC panel. We do not scale or manipulate the video feed. We present whatever your webcam shares with us. This may result in customers stating that IE's video quality is superior to Chrome.

## Helpful Details

- Incognito Mode is not supported - If a participant has joined the meeting in Incognito Mode, they will not be able to share their webcam. They should rejoin the meeting in normal mode.
- Sharing a webcam will not work if third-party cookies are blocked in the browser settings.
- Webcams are not automatically shared in Chrome. Users will need to select "Share My Webcam" at the bottom of the webcam panel.
- Webcams are automatically shared in IE. Users will need to select "Stop Sharing My Webcam" after joining if they do not want to share.
- There must be an enabled recording device (mic) on the computer for the webcam to be detected.

## Enabling camera and microphone

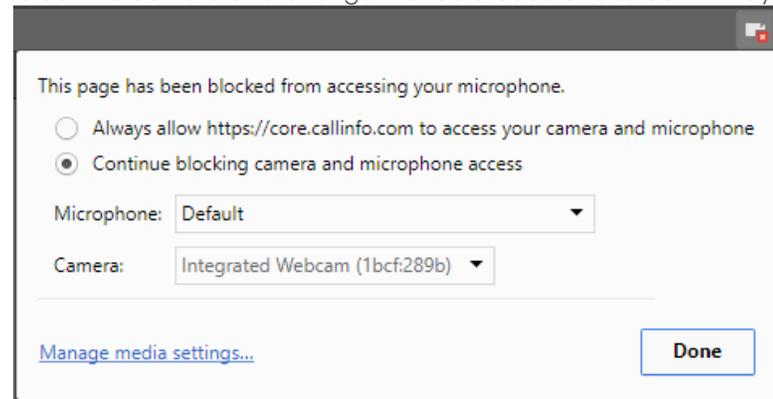
A participant must grant us access to their camera and microphone in order to use the video conferencing functionality. This will happen in the browser the first time a participant uses this solution.



If they were to select Block then we would not be able to access their camera or mic. If they do so accidentally they must first change this in the browser. They should look to the end of the address bar for a camera icon with a red square on it.



Select the camera and change the radio bubble to select "Always allow..."



Refresh the web page and they should now be able to share.

If the camera and mic are enabled in the browser, check the “Recording Devices” setting. At least one device must be enabled (this is for chairperson and participant)



Once you have enabled a device, go back to your browser and refresh your feed or have the chairperson disable then re-enable webcams.

Use the cog wheel at the bottom left of the EVCC panel to change your selected mic and camera after you make sure that you have allowed the devices via the browser

