

CLEARSPAN® MEET-ME CONFERRING

CREATING CONFERENCES

ACCESS

You have access to Conferencing features if you have been assigned to a Meet-Me conference bridge.

1. Log in to Clearspan.
2. On the Options list, click **Meet-Me Conferencing**. The *User – Meet-Me Conferencing* menu page appears.



User – Meet-Me Conferencing Menu Page

LIST AND DELETE CONFERENCES

Note that you can only delete conferences that you created.

To list the conferences for which you are a host or delegate or to delete the conferences you created, use the *User – Meet-Me Conferences* page as follows:

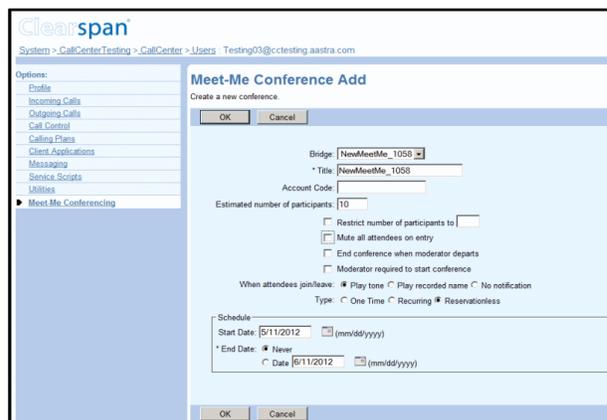
1. On the *Meet-Me Conferencing* menu page, click **Conferences**. The *User – Meet-Me Conferences* page appears displaying all your conferences. The type (*Active*, *Completed*, or *Inactive*) is indicated in the *Status* column.
2. To delete a conference, check *Delete* and click **Apply** or **OK**.

Alternatively, click **Edit** in the row of the conference to delete, and on the *User – Meet-Me Conference Modify* page that appears, click **Delete**.

ADD CONFERENCE

To add a one-time, recurring, or reservationless conference, use the *User – Meet-Me Conference Add* page as follows:

1. On the *User – Meet-Me Conferences* page, click **Add**. The *User – Meet-Me Conference Add* page appears.



User – Meet-Me Conference Add Page

2. Select a bridge from the *Bridge* drop-down list.
3. Type a descriptive title for the conference.
4. Optionally, enter an *Account Code*.
5. Enter the *Estimated number of participants* (maximum 294, but no higher than the number of ports on the bridge).
6. To mute attendees on entry, check *Mute all attendees on entry*.
7. To end the conference when the moderator leaves the conference, check *End conference when moderator departs*.
8. To specify that the conference cannot start without a moderator, check *Moderator required to start conference*.
9. To specify that a security PIN is required to join the conference, check *Enable security pin*.
10. To require that participants enter a self-identification code to access the conference, check *Allow Unique Identifier*.
11. Specify how to announce that a participant has joined or left the conference by selecting *Play Tone*, *Play recorded name*, or *No notification*.
12. Select the type of conference, for example, *One Time*.
13. Specify the conference schedule:
 - For a reservationless conference, type the *Start Date* and the *End Date* in MM/DD/YYYY format. If allowed, you can also select *Never* instead of the *End Date*.
 - For a one-time or recurring conference, type the *Start Date* in MM/DD/YYYY format. Type the *Start Time* of the conference in HH:MM format and select “AM” or “PM” from the list. Select the duration time in hours and minutes.
14. Specify the frequency of a recurring conference:
 - For daily, select *Daily* and enter the frequency in days.
 - For weekly, select *Weekly*, enter the frequency in weeks, and check the day or days of the week to schedule the conference.

- For monthly, select *Monthly*, specify the frequency in months, and enter the day of the month to schedule the conference.
 - For yearly, select *Yearly*, specify the frequency in years, and select the day of the year to schedule the conference.
15. Specify the end of a recurring conference. Select *Never*, specify the number of occurrences, or specify the date.
 16. Click **OK**.

MODIFY CONFERENCE

To modify conference information, use the *User – Meet-Me Conference Modify* page as follows:

1. On the *User – Meet-Me Conferences* click **Edit** or any item in the row of the conference to modify. The *User – Meet-Me Conference Modify* page appears. The *Profile* tab is displayed by default.
2. Modify conference information as required.
3. Click **Apply** or **OK**.

ASSIGN DELEGATES

You can assign delegates to conferences that you created. A conference delegate can modify and moderate the conference, but cannot delete or delegate the conference.

1. On the *User – Meet-Me Conferences* page, click **Edit** or any item in the row of the conference. The *User – Meet-Me Conference Modify* page appears.
2. Click the *Delegates* tab.
3. To find all available users, click **Search**. Alternatively, to find specific users, enter your search criteria and click **Search**.
4. In the *Available Users* column, select users to assign as conference delegates and click **Add**. The selected users are moved to the *Conference Delegates* column.
5. Click **Apply** or **OK**.

DEFINE CONFERENCE GREETING

You can define a custom greeting to be played to participants when they join the conference.

1. On the *User – Meet-Me Conferences* page click **Edit** or any item in the row of the conference. The *User – Meet-Me Conference Modify* page appears.
2. Click the *Custom Greetings* tab.
3. To play no greeting, check *No Greeting*.
4. To play a custom greeting, check *Custom Greeting* and select a greeting file to use from the drop-down list.
5. Click **Apply** or **OK**.

You can also upload the greeting using the voice portal.

DOWNLOAD OR DELETE RECORDINGS

1. On the *User – Meet-Me Conferencing* menu page, click **Recordings**. The *User – Meet-Me Conference Recordings* page appears.

2. To download a recording, click **Download** in the row of the target recording, and follow the instructions of your browser.
3. To delete one or more recordings, check the *Delete* box in the row of the recordings to delete, and click **Apply** or **OK**.

CONFERENCING MODERATOR CLIENT

The Conferencing Moderator client allows moderators to manage conferences. You can only moderate one conference at a time; however, a conference can be managed by several moderators.

USER INTERFACE

The following elements are available from the client's interface:

- **Conference Header Bar** – Displays the moderator information, conference information (such as name, ID, number, and security PINs) and contains general controls. It also contains *Help* and *Sign Out* links.
- **Global Message Area** – Displays for 10 seconds any information, warning, or error message that needs to be communicated to the user.
- **General Controls** – Allow you to perform actions on the conference. They are *Lock/Unlock Conference*, *Start/Pause/Resume/Stop Recording*, *Lecture Mode*, *End Conference*, *Play Security Classification Announcement*, and *View Call History*.
- **Dialer** – Allows you to add participants to the conference.
- **Message History Window** – Lists the last 15 messages that were displayed in the *Global Message Area* ordered from the most recent to the oldest.
- **Moderator and Participant Lists** – List conference moderators and participants, with their phone number and status, which can be *Active Talker* , *Muted* , *Unmuted* , or *On Hold* .
- **Action Buttons** – Allow you to perform actions on a selected moderator or participant. The buttons are *Mute/Unmute*, *Hold/Unhold*, and *Drop*. In addition, on moderators' rows only, there is *Lecture Mode On/Off*. These buttons appear when the row for a person is in focus and when the actions they represent can be performed.

MUTE OR UNMUTE PARTICIPANT

Move the mouse over the participant and click **Mute** or **Unmute**.

NOTE: In Automatic Lecture Mode, only up to 100 participants can be unmuted.

PUT PARTICIPANT ON HOLD OR RESUME A HELD PARTICIPANT

Move the mouse over the participant and click **Hold** or **Unhold**.

DROP PARTICIPANT

Move the mouse over the participant and click **End**.

TURN LECTURE MODE ON OR OFF

When Lecture Mode is turned on, new participants are automatically muted upon joining the conference.

- To turn on Lecture Mode, click **Lecture Mode** . You become the lecturer and the remaining participants are muted.
- To turn off the Lecture Mode, click **Lecture Mode** again.

NOTE: When there are more than 147 participants in a conference, Automatic Lecture Mode starts and the *Automatic Lecture Mode* icon appears . Automatic Lecture Mode cannot be turned off.

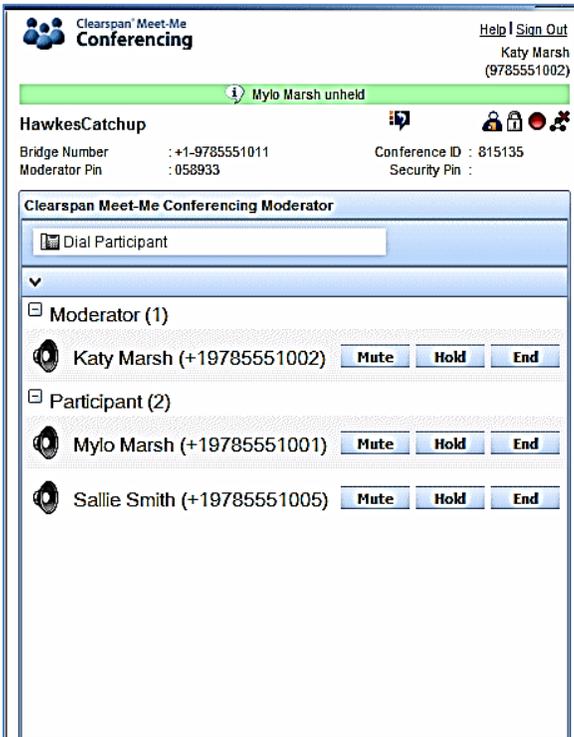
LOCK OR UNLOCK CONFERENCE

To lock or unlock the conference, click **Lock Conference**  or **Unlock Conference**  on the *Conference* header bar. When the conference is locked, no new participants can join the conference.

START, STOP, PAUSE, RESUME RECORDING

You use the *Start/Stop/Pause/Resume* buttons on the *Conference* header bar, to manage conference recordings.

- To start recording, click **Start Recording** . A confirmation message appears in the *Global Message* area. The Start Recording button changes to the Pause Recording button and the Stop Recording button appears on the *Conference* header bar.
- To stop recording, click **Stop Recording** .



Meet-Me Conferencing Moderator

LAUNCH CONFERENCING MODERATOR AND JOIN CONFERENCE

You can launch the Conferencing Moderator client either from the web portal or from the Outlook meeting if you included the conference to moderate in an Outlook meeting.

- Either on the web portal or in Outlook, access the conference/meeting to moderate.
- Click **Launch Moderator Client** on the web portal page or select it from the *Meet-Me Conference* menu in Outlook.
- To join the conference, click the **Call Me Now** link and enter your number or dial the conference number from your phone.
- When prompted, enter the required PIN or PINs.

Note that in the following procedures, *participant* stands for a participant or moderator.

ADD PARTICIPANT

This is available if individual outdial is enabled for the bridge.

- In the *Dialer*, enter the person's number and click the **Call** button that appears to the right.



- To pause recording, click **Pause Recording** . The Pause Recording button changes to the Start Recording button.
- To resume recording, click **Start Recording** . The Start Recording button changes to the Pause Recording button.

END CONFERENCE

On the *Conference* header bar, click **End Conference** .

PLAY SECURITY CLASSIFICATION ANNOUNCEMENT

On the *Conference* header bar, click **Security Classification Announcement** .

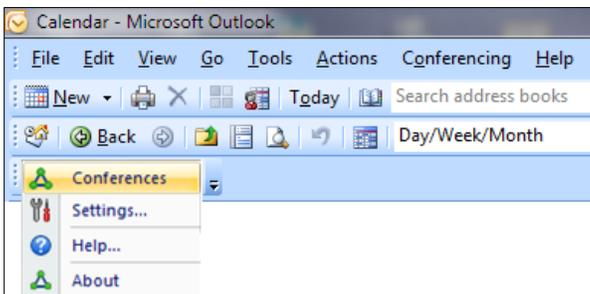
VIEW MESSAGE HISTORY

To view recent messages that were displayed in the *Global Message Area*, click the **Message History** button . The *Message History* window appears.



Message History

MEET-ME CONFERRING OUTLOOK ADD-IN

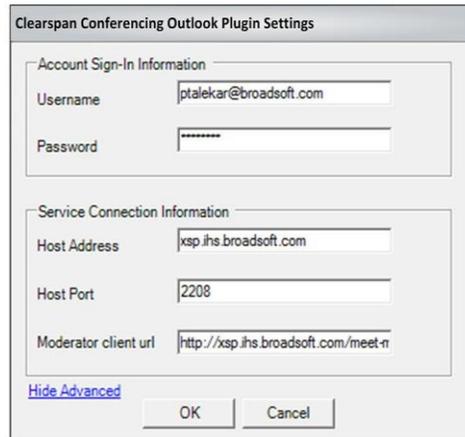


Meet-Me Conferencing Outlook Add-In Toolbar

CONFIGURE YOUR CREDENTIALS AND SERVER ADDRESS

The *Conferences* menu option is disabled until you configure your credentials and server information.

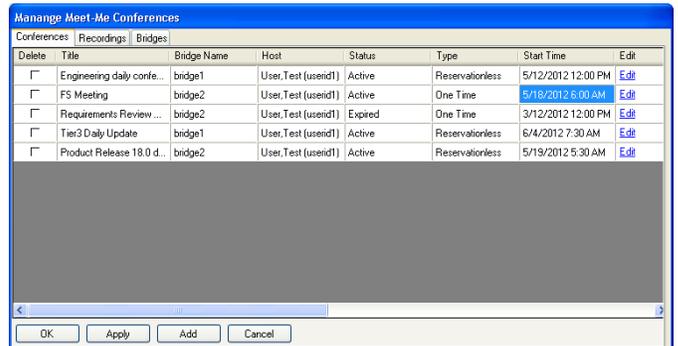
- Click **Settings**.
- In the *User Settings* window, enter your Clearspan user name and password.
- Click the **Advanced** link. The window expands, displaying the *Server Details* area.
- Enter the IP address and port number of the Clearspan Open Client Server and the URL of the moderator client.
- Click **OK**.



LOGIN PROCESS

You do not have to manually log in to the Meet-Me Conferencing Outlook Add-in. If you configure your credentials, the add-in logs you in as soon as you open a meeting. If the login fails, the conference icon is grayed out.

VIEW CONFERENCES



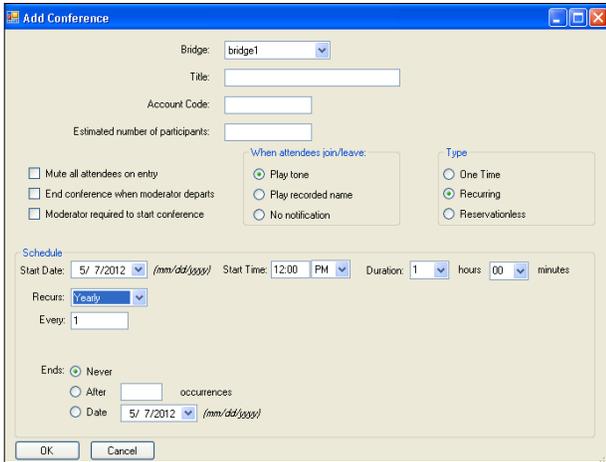
Manage Meet-Me Conferences

To view conferences for which you are a host or delegate, select *Conferences* from the *Meet-Me Conferencing Outlook Add-In* toolbar.

CREATE NEW CONFERENCE

You must have access to a bridge on Clearspan to be able to create a Clearspan Meet-Me Conference from Outlook.

- In the Manage Meet-Me Conferences dialog box, click **Add**. The *Add Conference* dialog box appears.

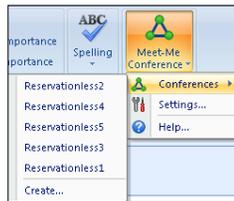


2. Enter the required information. For details, see [Add Conference](#) in this Quick Reference Guide.
3. Click **OK**. The conference is created on Clearspan and the meeting invitation is populated with conference information.

INCLUDE RESERVATIONLESS CONFERENCE IN MEETING

Only reservationless conferences can be included in Outlook meetings.

While scheduling a meeting in Outlook, from the *Meet-Me Conferencing* menu, click **Conferences**, and then select an existing conference from the list.

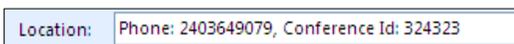


The body of the Outlook meeting invitation is populated with the conference invitation text. There is no interaction with Clearspan when the meeting invitation is populated. The text includes:

- Phone number of the bridge and conference ID.
- Security PIN, if enabled for the conference.
- Call Me Now link, that is, a link to a web page where users can enter the number on which they want to be called back.



The *Location* text box of the invitation is populated with the bridge phone number and conference ID. If this information is overwritten, the *Location* text box is not repopulated.



MODIFY CONFERENCE

1. In the *Manage Meet-Me Conferences* dialog box, click **Edit** on the row of the conference. The *Edit Conference* dialog box appears.
2. Modify information as required. For details, see [Add Conference](#) in this guide.
3. Click **OK**.

DELEGATE CONFERENCE

1. In the *Manage Meet-Me Conferences* dialog box, click **Edit** on the row of the conference. The *Edit Conference* dialog box appears.
2. Click the *Delegates* tab.
3. Use the search function to find available users.
4. In the *Available Users* column, select users to assign as conference delegates and click **Add**. The selected users are moved to the *Conference Delegates* column.
5. Click **OK**.

DELETE CONFERENCE

To delete a conference, in the *Manage Meet-Me Conferences* dialog box, check the *Delete* check box on the row of the conference and click **Apply** or **OK**.

In addition, when you delete an Outlook meeting that includes a conference and you are logged in to Clearspan via the add-in:

- If the meeting is non-recurring or if it is recurring and you delete all occurrences, the Clearspan conference is deleted.
- If the meeting is recurring and you delete one occurrence or if the conference is reservationless, the Clearspan conference is not modified.

DTMF COMMANDS

DTMF conference control commands are available to both moderators and participants.

MODERATOR DTMF MENU

You can invoke the DTMF menu at any time during the conference by pressing “*”. Only you hear the menu, while other participants continue talking in the conference, and you do not hear the conference.

The following functions are available to moderators through the DTMF menu:

- * – Repeat the menu options
- 0 – Transfer to Operator
- 1 – Mute or unmute this line
- 2 – Participant count, followed by roll call
- 3 – Turn on or turn off Lecture Mode
- 4 – Lock or unlock conference
- 5 – Recording submenu

- 6 – Invite a new participant by calling the participant
- 8 – End conference
- # – To return to the conference

PARTICIPANT DTMF MENU

Control functions are also available to participants (who are not moderators) and are accessible via a DTMF menu. You can invoke the DTMF menu at any time during the conference by pressing “*”. Only you hear the menu, while other participants continue talking in the conference.

The following functions are available to participants through the DTMF menu:

- * – Repeat the menu options
- 0 – Transfer to Operator
- 1 – Mute myself or unmute myself
- 2 – Participant count, followed by roll call
- 9 – Log in as moderator
- # – To return to the conference

NOTES

If you do not want to listen to the menu, you can invoke an option by pressing “*” followed by the digit for the option you want. For example, you can press “*0” to be transferred to the operator. If you enter any other digit, you are returned back to the conference.

Log in as Moderator

When a participant invokes this option, they are asked for the moderator PIN. If the PIN is correct, they become a moderator and can execute moderator commands.

Mute/Unmute

A participant can only mute or unmute themselves. If a moderator has muted a participant’s line, the participant cannot unmute it.

Transfer to Operator

This function disconnects you from the conference and transfers you to a phone number defined against the conference bridge. A human operator, an Auto Attendant, or a VoiceXML script can answer the call to help you.



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