CONFERENCING

A User's Guide

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My Menu / Account Info

Your account info includes your login info, billing arrangement, and contact information. To view or change your account info, sign in to your account at https://af.confertel.net and click on the "Account Info" link on the left side of the page.

Email Address

Use your email address to sign in to your account. You can change this at any time, but it must be an email address that is not already used by another account. Civicom sends automatic notifications to this email address.
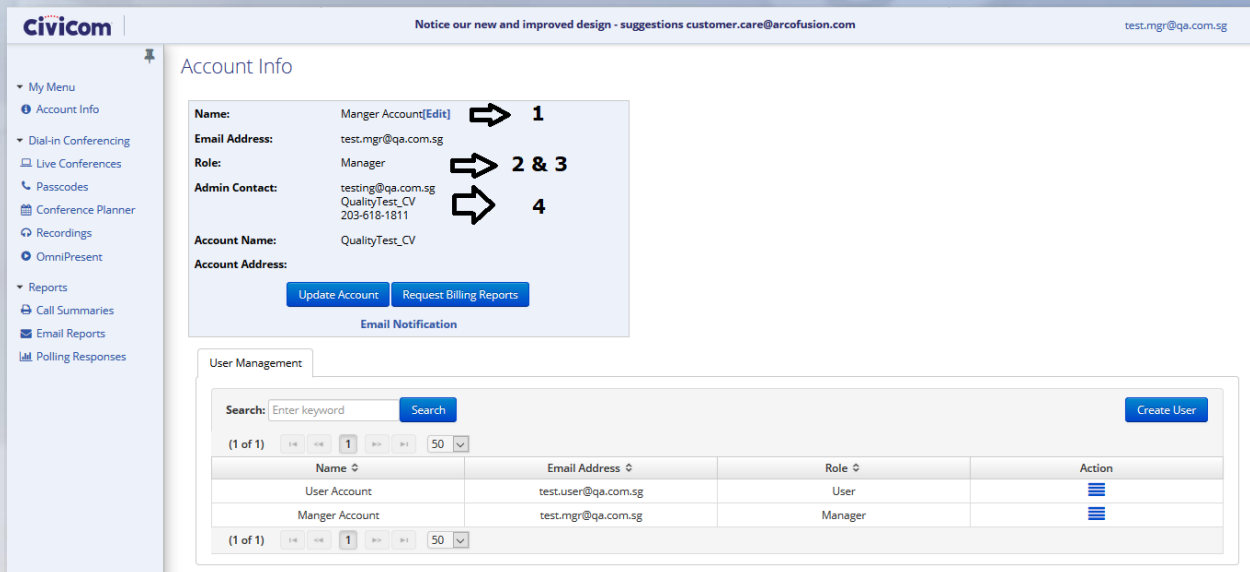
Password

Use your password to sign in to your account. You can change this at any time. Passwords must follow the following guidelines:
- At least 8 characters;
- Must have at least one (1) uppercase;
- Must have at least one (1) lowercase;
- Must have at least one (1) number;
- Must have at least one (1) special character

Roles

Roles define what type of access you have in the account. Civicom uses "*Manager"* and "*User"* as roles to distinguish what type of flexibility you have for security and account management. See details below:

1. **Account Name / Address**
   The account name is your billing contact information, which is required if your billing contact is different than your administrative contact. If provided, Civicom sends invoices to this address (otherwise, the administrative contact is used).

2. **Manager**
   Manager roles (also known as the "Master" account) are the account holders. Below are actions that are available under this role:
   - ✓ They have the ability to generate new passcodes (either their own or have them assigned to users under their account).
   - ✓ Modify and create new users under their account.
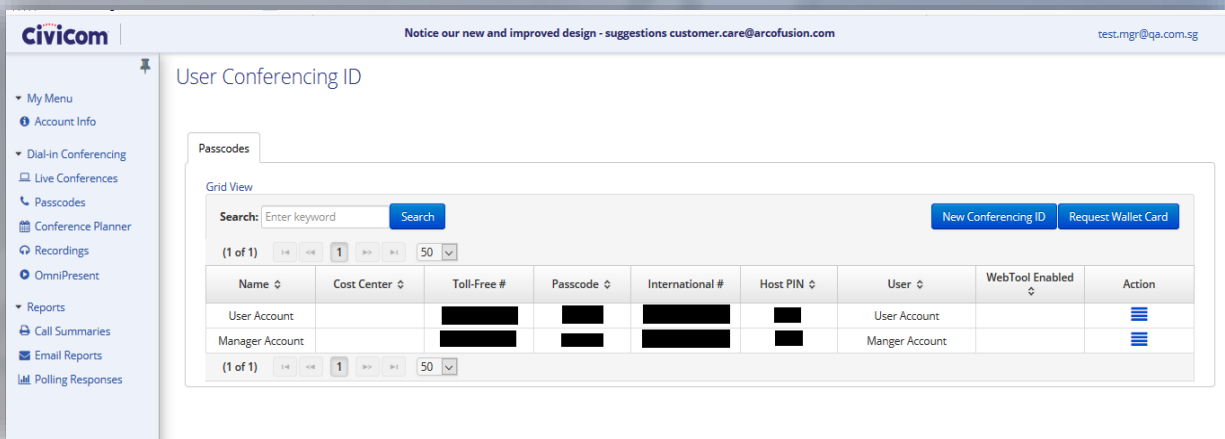   - ✓ Access to recordings (including those from the users).

3. **User**
   User roles (also known as the "Sub" account) can be the account holder's moderators or hosts. They also have the ability to manage calls and access recordings but is limited to passcodes assigned to their account.

4. **Admin Contact**
   This is your primary or administrative contact information. Civicom sends invoices to this address if there is no account or billing contact provided.

Dial-In Conferencing

The Dial-In Conferencing page lists the passcode/s associated with your account, see figure below. You may also view the active conferences from this page. See the list or search passcode.
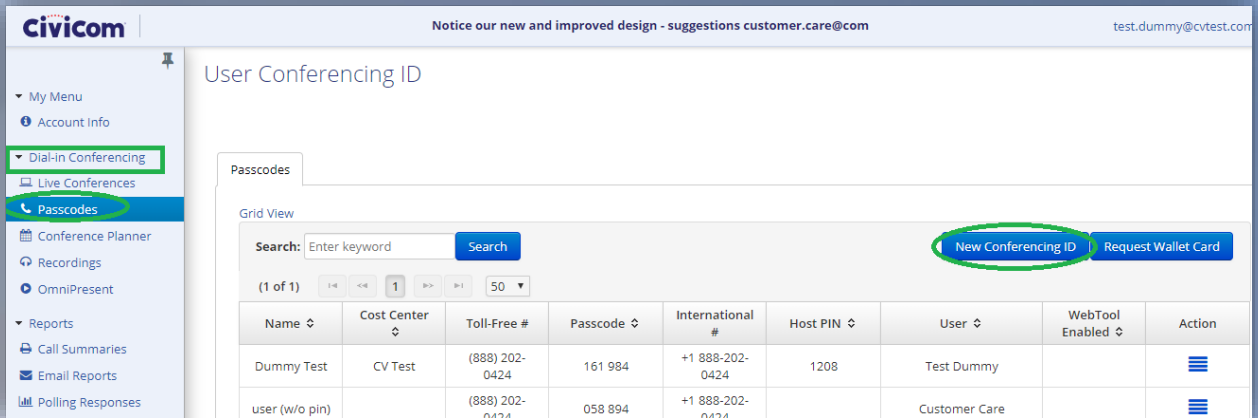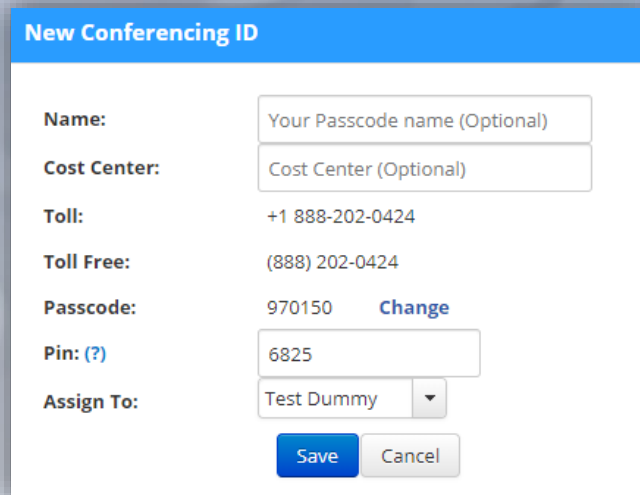
GENERATE NEW PASSCODE

1. Click "New Conferencing ID" through passcodes under dial in conferencing and a new passcode will be randomly created.

2. A window comes up that display the details of the new passcode including, host pin, toll free, and toll numbers. You have the option to change random passcode and even customize host pin (subject to some set guidelines) while at the same window. Option to name that passcode and cost center is also available.

3. Whether if it's the manager or user, whoever generates the passcode automatically is the owner, shall receive an email which has the details of the new passcode. However, a manager can generate a passcode and have it reassigned to a user under their account.

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ACTION: Configuration

List of conferencing features that you can modify for a given passcode can be found inside the configuration screen. You may also retire that passcode from the same screen. To access this, click on Configuration from one of the actions available below.
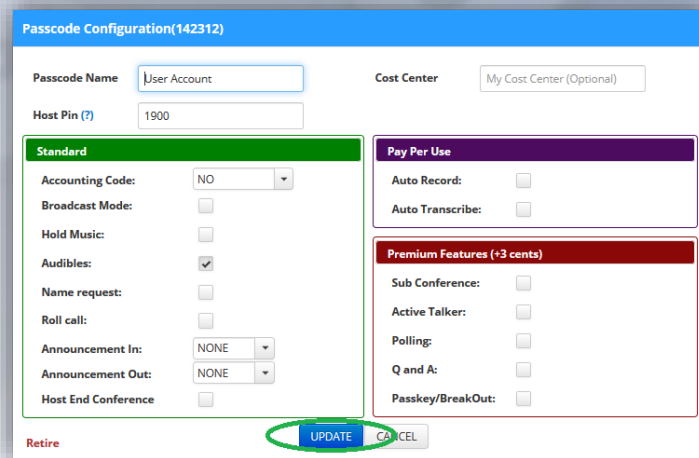
MODIFY PASSCODE DETAILS AND OWNER

Passcode details:

1. Click "Passcodes" under dial in conferencing.
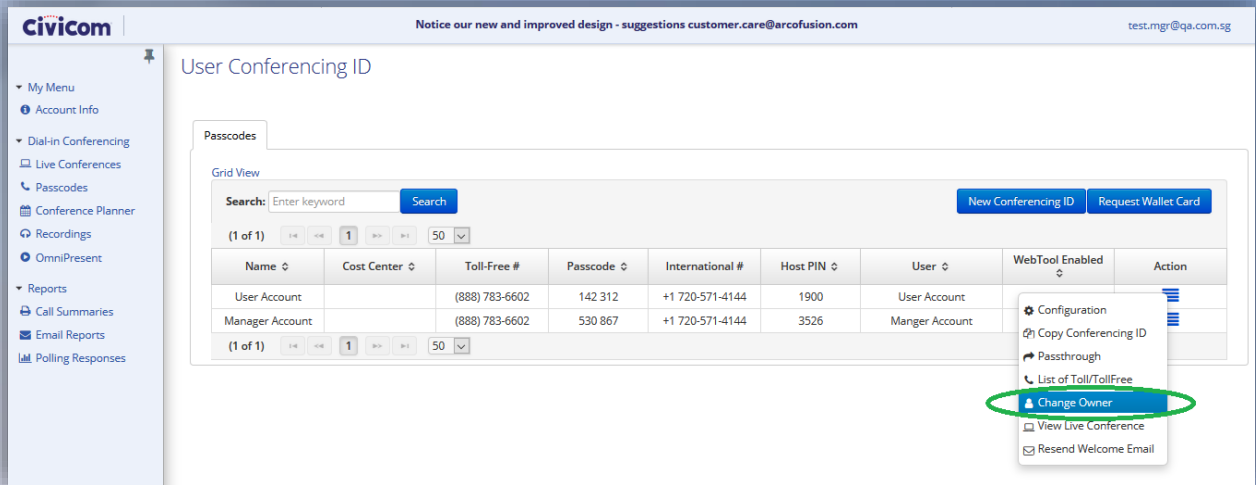2. Search for the passcode then click "Configuration" under the action drop down list.
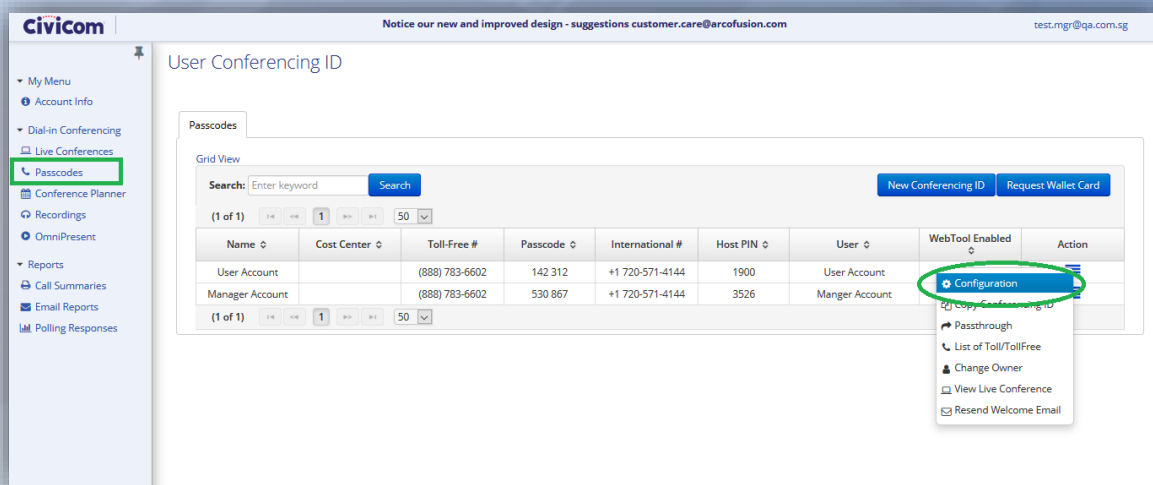
3. Set-up conference features needed through the passcode configuration window then click "Update."

ACTION: Change owner

Unassign and assign owner:

1. Click action icon then select "Change owner."

2. Window comes up then click the dropdown list, select and assign a new user to the passcode.
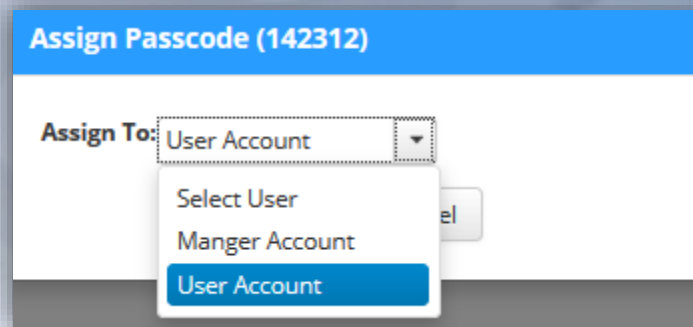
3. An email will be generated and sent to the new owner which contains the details including the conference access, mobile 1-tap, and online account management.

Remove/delete a passcode:

You may opt to remove a passcode from the list with the following steps:

1. Click on "Passcode" under dial in conferencing then search for the passcode
2. Go to action then click on "Configuration."
3. Window comes up then click "Retire" at the bottom left corner then message comes up as "Remove passcode." Click "Yes" to proceed deleting the passcode.

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ACTION: Copy Conferencing ID

1. Still in "Passcodes" page, under "Action" click on "Copy conferencing ID."
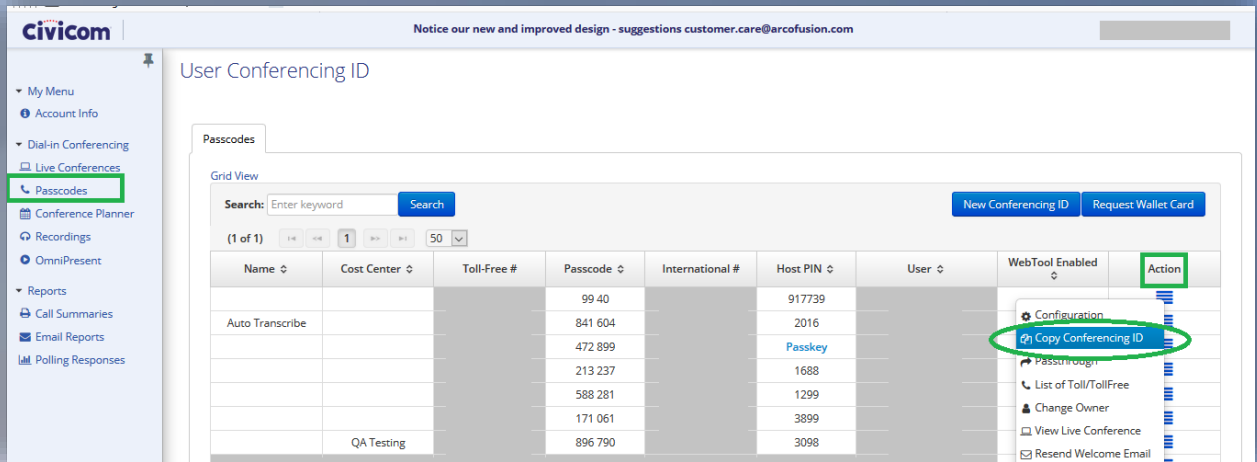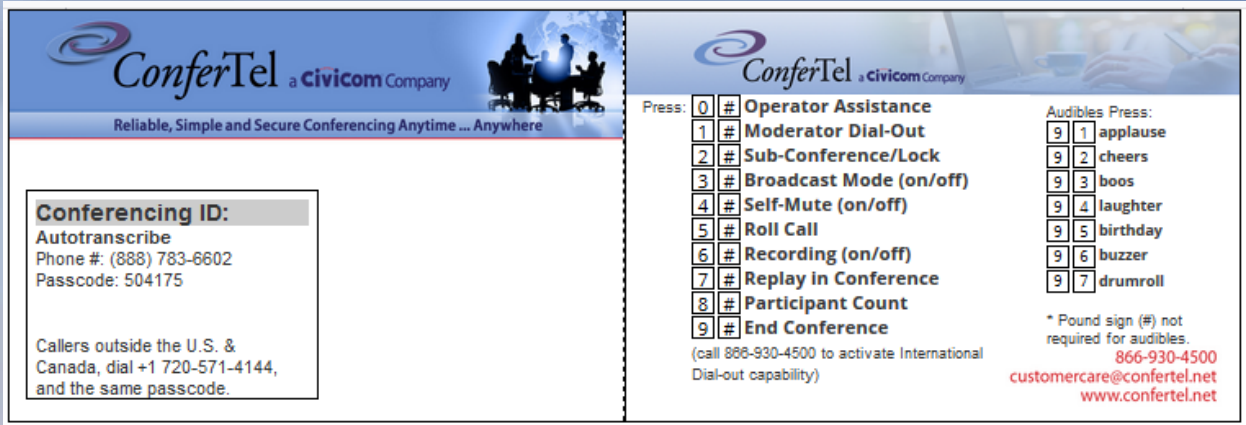
2. A pop-up window comes up which has the details of the conferencing ID (passcode). Depending on your browser, either screen will prompt "Copy to clipboard" then click "Ok" to land on the pop-up screen below or it lands directly to the screen below the click on "Copy to clipboard" on the same window.
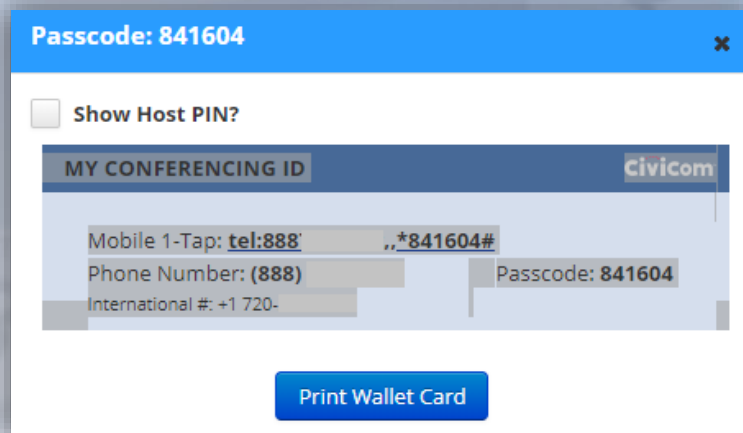
3. You have the option whether host pin would be included in the conferencing details by placing a checkmark inside the "Show host pin?" check box. You may paste the conferencing details directly through the email body or even on a word type of document.

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4. You may also print the conferencing details as a wallet card. Just click "Print wallet card" button and you will be rerouted to the page for conferencing details on a "Card" type of view (sample next page).
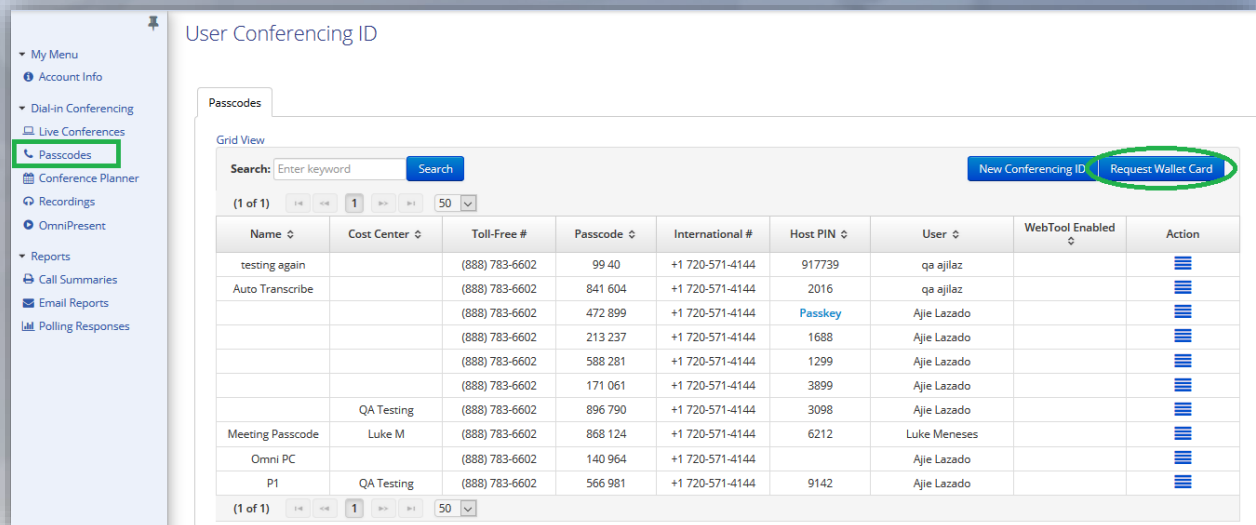
5. In case you need wallet card for multiple passcodes, on Passcodes page click "Request wallet card" button.

6. You will be routed to the page containing list of passcodes under your account. Select the passcode/s and whether card/s will be printed or to be sent via email. Then indicate the number of copies under "How many" column (NOTE: maximum of 6 copies if printed while 999 if to be sent via email).

ACTION: Passthrough

Users may add passthrough settings that can be associated to a conference passcode. This feature allows the caller to directly enter a conference through a pre-defined telephone number. You may access the passthrough settings (see image below) from clicking the Passthrough link.

Input telephone number then click ADD button.

Once a telephone number is on "Passthrough," caller will not be asked for the passcode thus, routed to the prompt whether they are calling as a host or participant. If they are calling as a host, a host pin will have to be entered. Otherwise, they will be connected to the call as participant.

In case caller intends to connect with a different passcode and they use the phone number that is on passthrough, they may press any key on the phone keypad to stop passthrough connection then dial the intended passcode.

ACTION: List of Toll/Toll-free

You may find and view both toll- and toll-free numbers assigned under your account by selecting this option from the drop-down list.

ACTION: View Live Conference

If the call is ongoing for that passcode, you may view and monitor the live call by clicking the "View Live Conference" option under the dropdown list. This will route you directly to the live call manager.

ACTION: Resend Welcome Email

In case any of your users do not receive the welcome email originally sent after generating a conferencing ID, you may send it again by clicking this option.
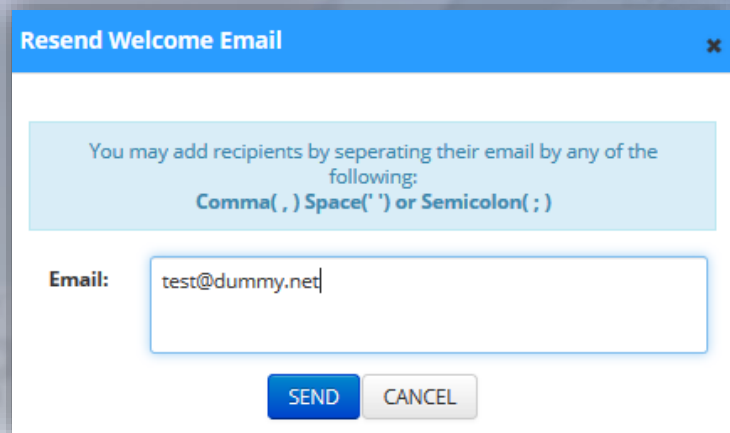

A pop-up screen comes up where you can input the email addresses of those recipients you want to receive such email.

Live Conference

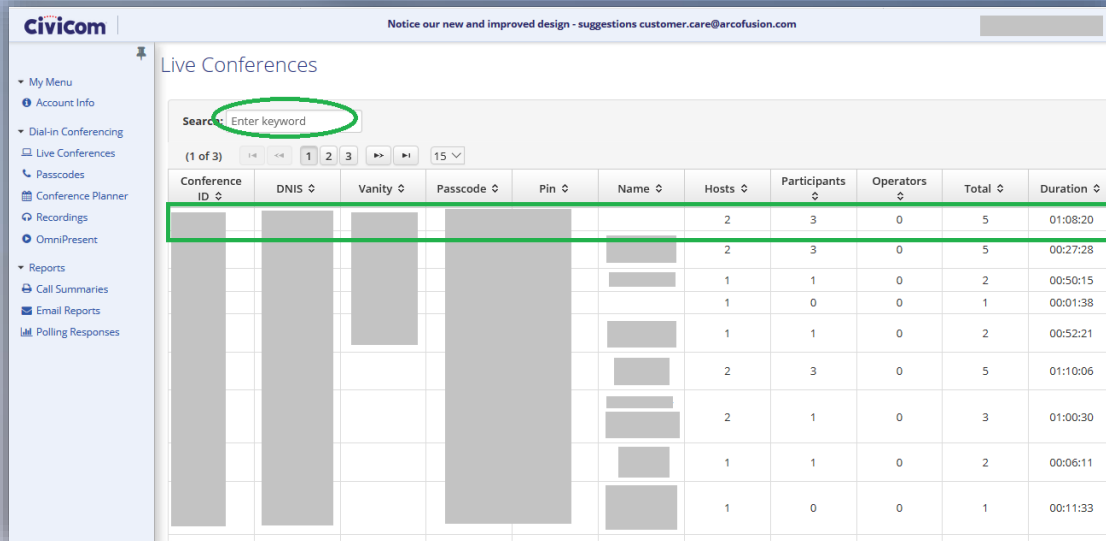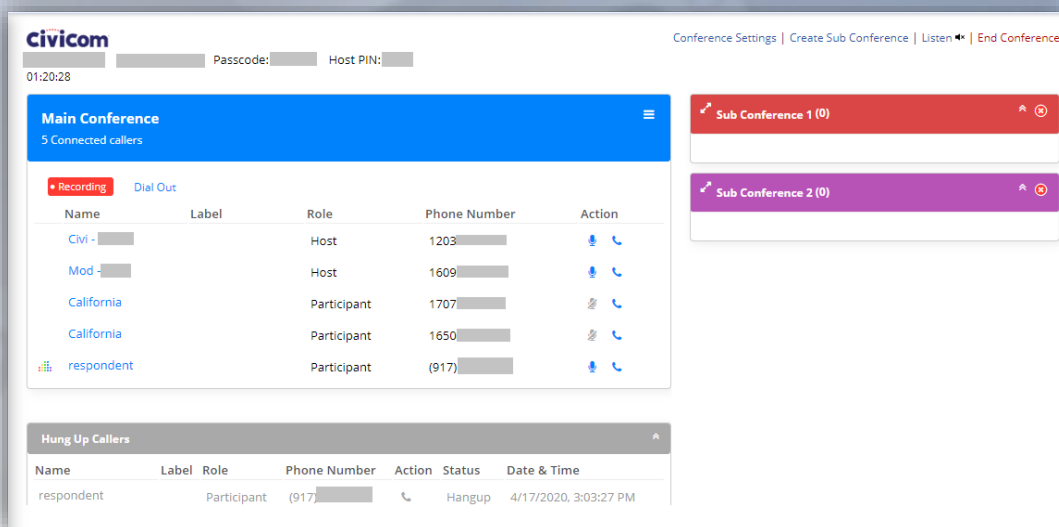Live conference shows how many conferences are active under your account. You may search or configure any passcodes listed. To access this, click on View Active Conferences from the link shown in image below.

Each row is clickable. You may either select from the list or search for the passcode using the search window. Click on the row of the selected passcode then it should route you to the live call manager (sample below).
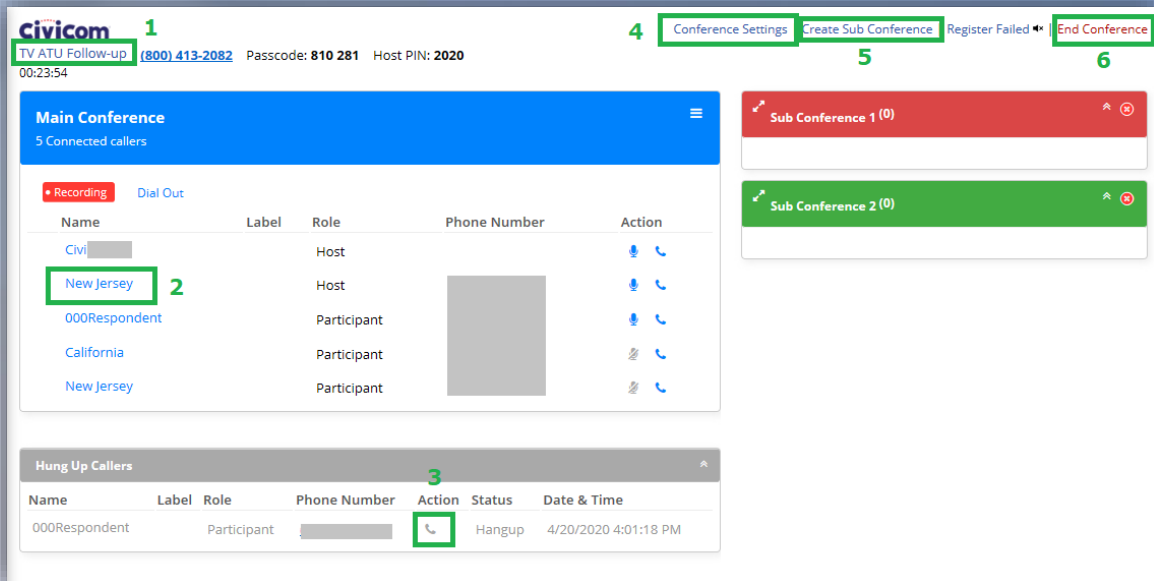
NOTE: Manager of the account will have access and view live call on all passcodes under their account while users may access and view their own passcodes only.

***LIVE CONFERENCE SECTIONS: ***

1. Cost Center – Section is optional yet you may have this modified during the live call. Click on the text then a pop-up screen comes up then edit this section.

2. Caller's name – Each can also be modified. Click on the text then a pop-up screen comes up for you to edit the name of caller.

3. Redial button – in case caller's line is dropped, the details will appear at the "Hang-up callers" section of the page. Just click on the redial button to call back and connect the caller to the conference.

4. Conference settings – some conference features can be modified during the live call. Click on this and a pop-up screen comes.

    a. *Conference lock* – if enabled, succeeding callers will hear a prompt that call has been locked by the host and they will not be able to connect into the call.
    b. *Audibles enabled* – Short sound bites that play into the conference by keying in a 2-digit code on the phone.
    c. *Active talker enabled* - An indicator in the live call monitor that shows who among the participants are talking. It is also useful when tracing background noise.
    d. *Max duration* – you may change the conference length for up to 12 hours using this set-up.
    e. *Announcement in* – chime sound upon entry can either be turned on or off.
    f. *Announcement out* – chime sound upon exit can either be turned on or off.
    g. *Max callers* – you may set number of participants (minimum 10, maximum 4000) during the call. Once the set number of callers is set, succeeding callers will hear a prompt that the number of participants for that conference is already met.

Conference Settings

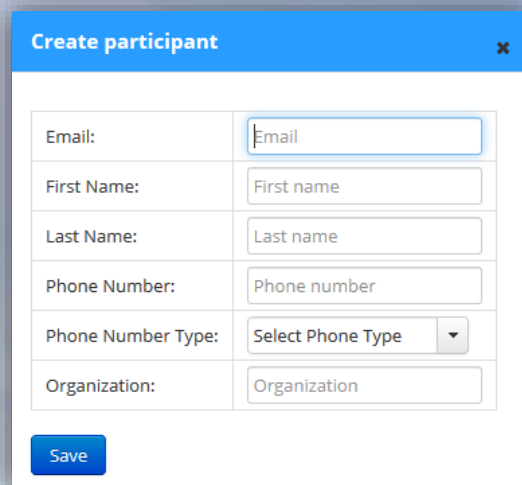|	
Conference Lock:	☐
Audibles Enabled:	☐
Active Talker Enabled:	☐
Fraud Monitor Enabled:	☑
Max Duration:	3 hours ∨
Announcement In:	None ∨
Announcement Out:	None ∨
Max Callers:	100 ∨

Close

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5. Create subconference – click on this feature and create new rooms for the same conference. This feature has to be enabled before the conference begins.

6. End conference – once clicked, it drops all callers from the conference (including the subconferences, if any).

CONFERENCE PLANNER

The Conference Planner is a conference scheduler feature where users can manage participants, profiles, and schedule the conference. There are three (3) main steps in using this feature.

Step 1: You must set a conference "Participant." Each participant is created individually using the dialog box (see image 1). Participant's details entered should be displayed through list immediately after being added (see image 2).

Create participant

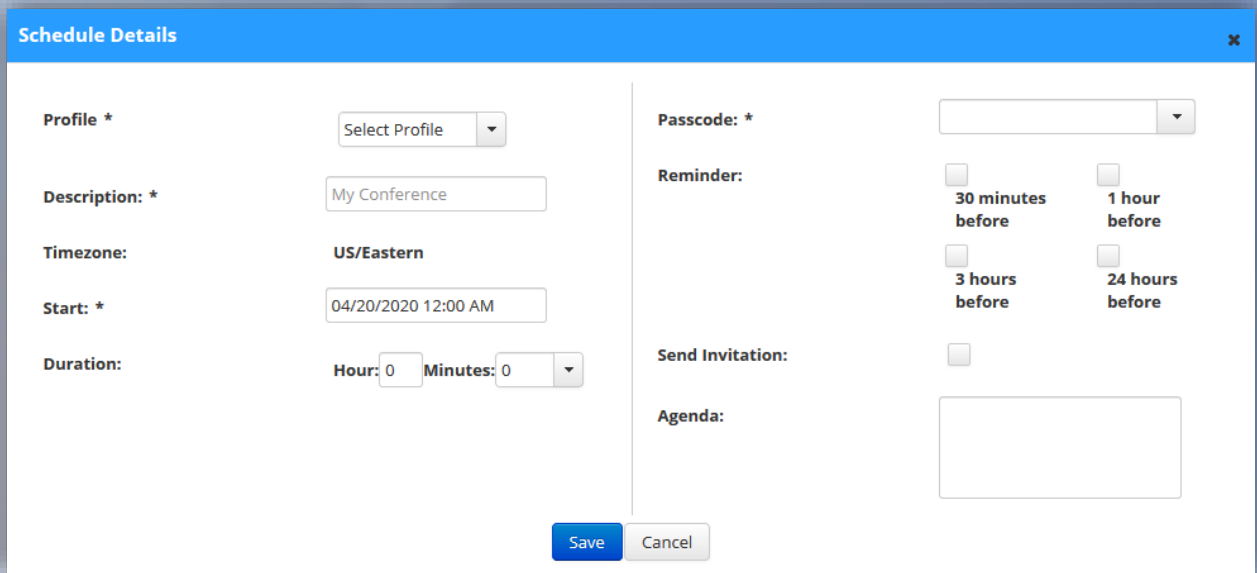|	
Email:	Email
First Name:	First name
Last Name:	Last name
Phone Number:	Phone number
Phone Number Type:	Select Phone Type ▾
Organization:	Organization

Save

1
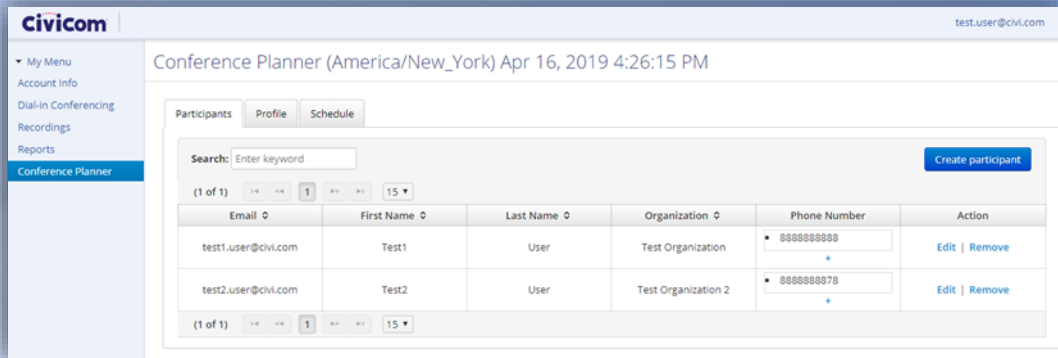
2

Step 2: After creating the Participants, you need to group them by creating a Profile (which consists of 2 or more participants), see image 3. You can create multiple profiles with different participants. A Profile is required when scheduling a conference in order for the system to identify who are the list of Participants that will be notified with the conference information such as the toll-free, toll and passcode.
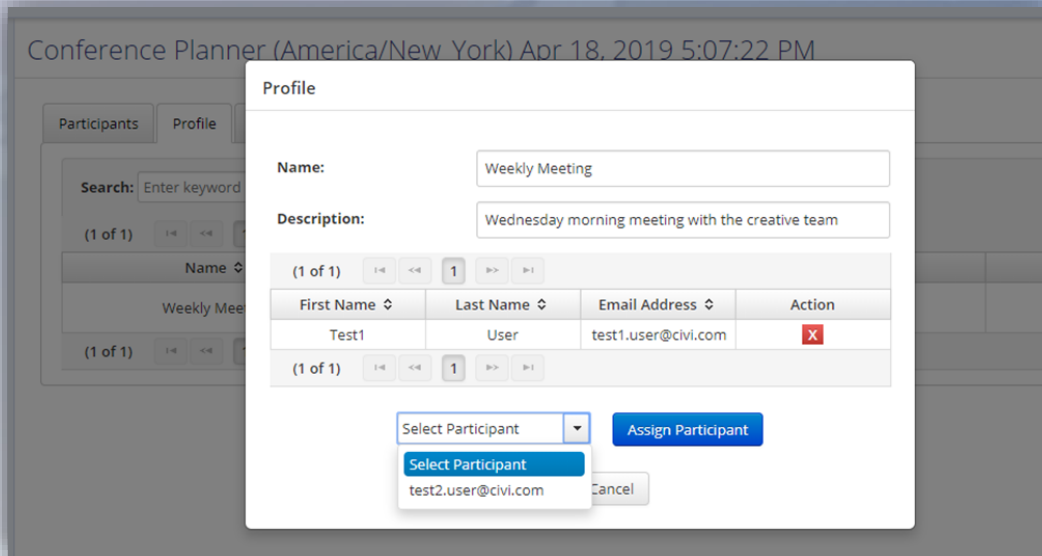
3

Finally, the scheduling of a conference. After creating Participants and grouping them into different Profiles, you need to choose one Profile for a given conference. After selecting a Profile, proceed with setting the schedule and the duration of the conference (which will be based on your time zone), see image 4. Filling up the required fields and hitting the save button will send an invitation to your list of attendees (list of participants under the assigned Profile).

Schedule Details   ✕

Profile *	Select Profile ▼	Passcode: *	▼
Description: *	My Conference	Reminder:	☐ 30 minutes before ☐ 1 hour before
Timezone:	**US/Eastern**		☐ 3 hours before ☐ 24 hours before
Start: *	04/20/2020 12:00 AM	Send Invitation:	☐
Duration:	Hour: 0 Minutes: 0 ▼	Agenda:	

Save   Cancel
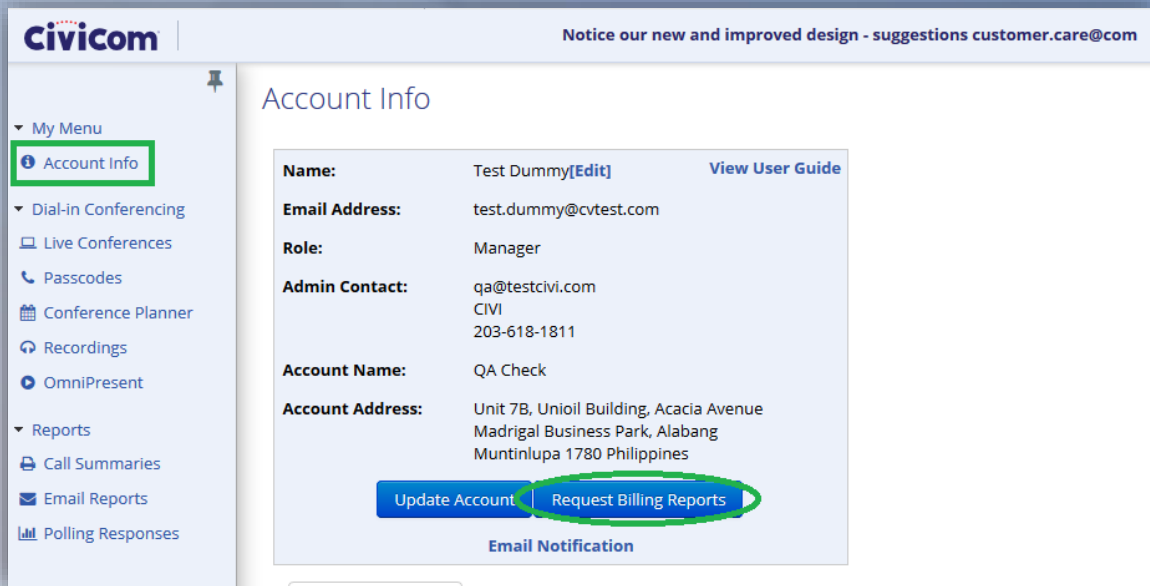
Updating and cancelling the conference will also send an email to your participants.

BILLING

To view and/or access the billing report:

1. Click "Account info" under my menu
2. Under the account address, click "Request Billing Reports" button.

3. Request billing report window should come up.
4. Select the desired month and year of the billing to be generated (NOTE: if the billing is for the current month, this should be subject to change due to the month hasn't closed).
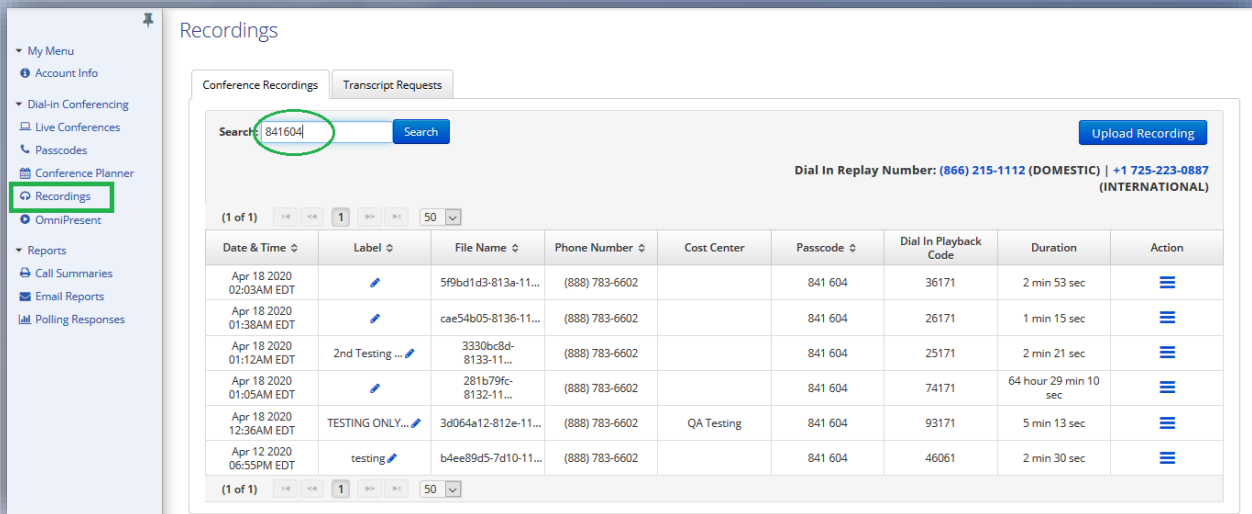
RECORDING

Access recording

1. Under dial in conferencing, click "Recordings."
2. Enter the **passcode** thru the search box then hit enter or search.
3. Conference recording page should filter those recordings mainly for that passcode.

4. Click on date & time column to sort out the recordings based on their preference. Sorting order can either be ascending (oldest to latest) or descending (latest to oldest).
5. Select and click the row of the recording. Player would come up in which recording can be played back and/or even downloaded.

6. Enter a label to customize recording name using the field below. The label placed in the recording will reflect on both when file is downloaded and/or recording link is copied.

Delete recording

1. Select and click "Remove" under action column.

2. Dialog should come up confirming whether or not to proceed with the recording removal. Selecting "Yes" would then remove the recording from the list.

3. Contact customer care team in case recording needs to be retrieved. Customer care team reaches out to Dev team to check and pull the recording.

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Sending a recording link

1. Select recording then click the action icon. Click "Send recording link."

2. Enter the recipient's email address. In case of multiple recipients, enter the email addresses followed by either comma (,), single space, or semicolon (;) as separator then click send.

Request for transcript

1. Select conference recording then click the action icon. Click "Request service."

2. Request service window comes up. Select the desired type of service, preferred delivery, place checkmark if there's any special instructions, and additional notes (if any). Then click "Request."
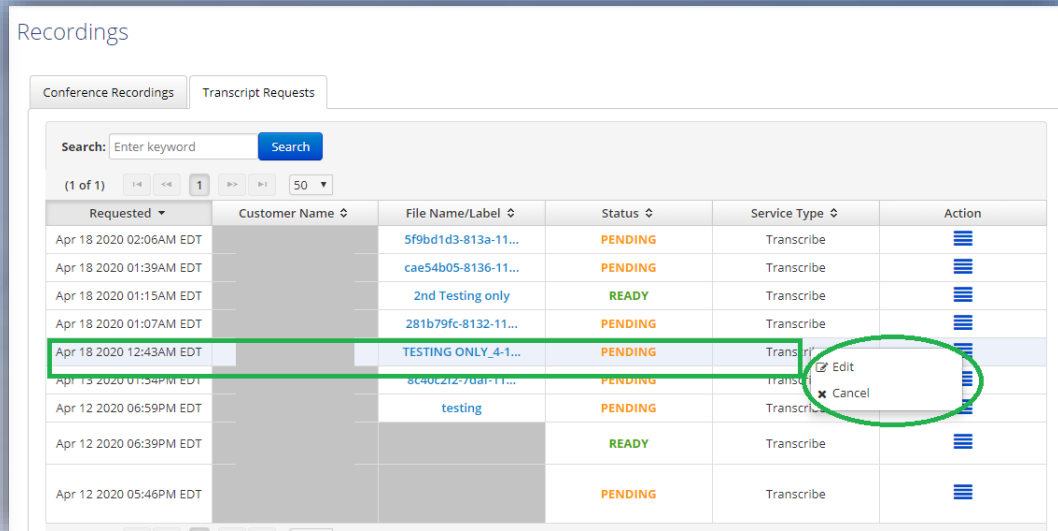
3. After submitting the request, check "Transcript request" tab. The selected recording queued for transcription should be viewed. User may opt to edit or cancel the service request under the action column.

Upload a recording

1. Go to "Conference recordings" tab in the Recordings page then click "Upload recording" button.
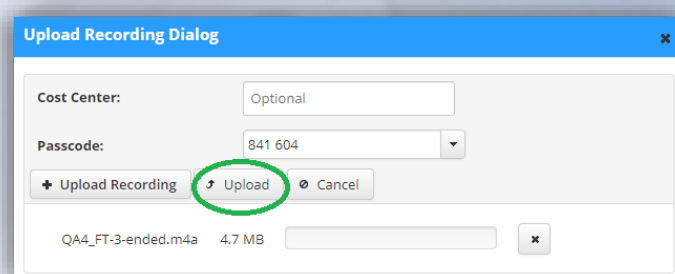
2. Enter cost center and passcode (if any – these 2 fields are optional). Click "Upload recording."
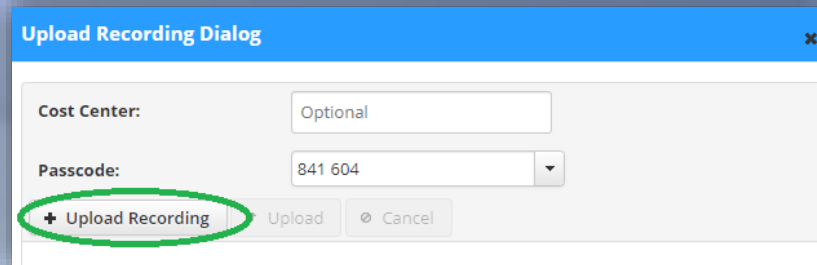
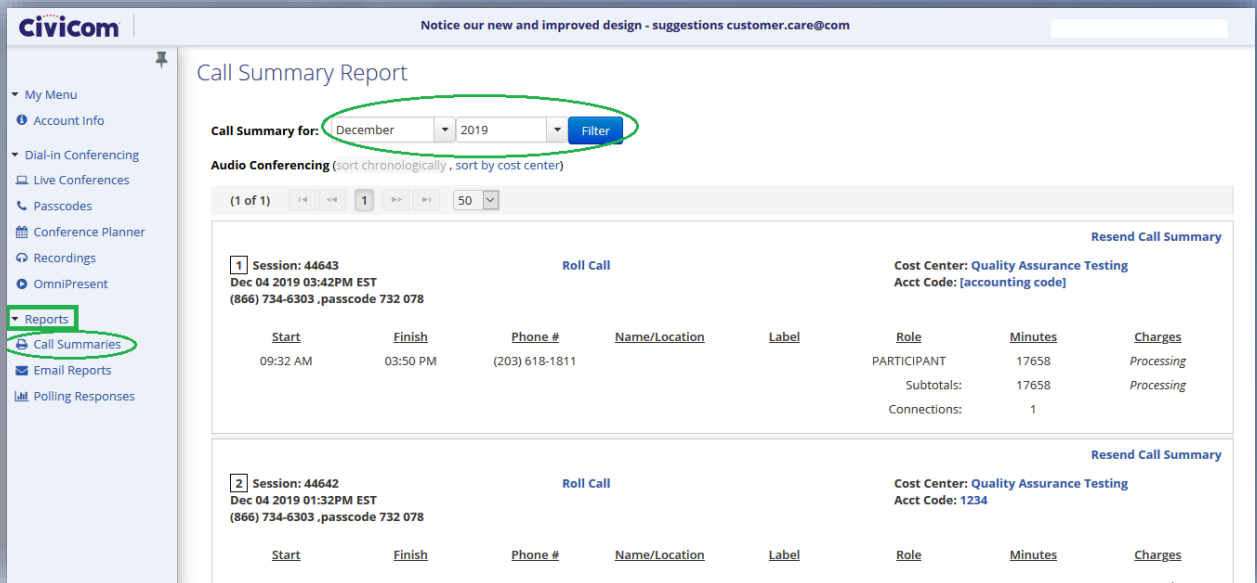3. Select the media (either mp3 or mp4 file format) to be uploaded then click "Open."
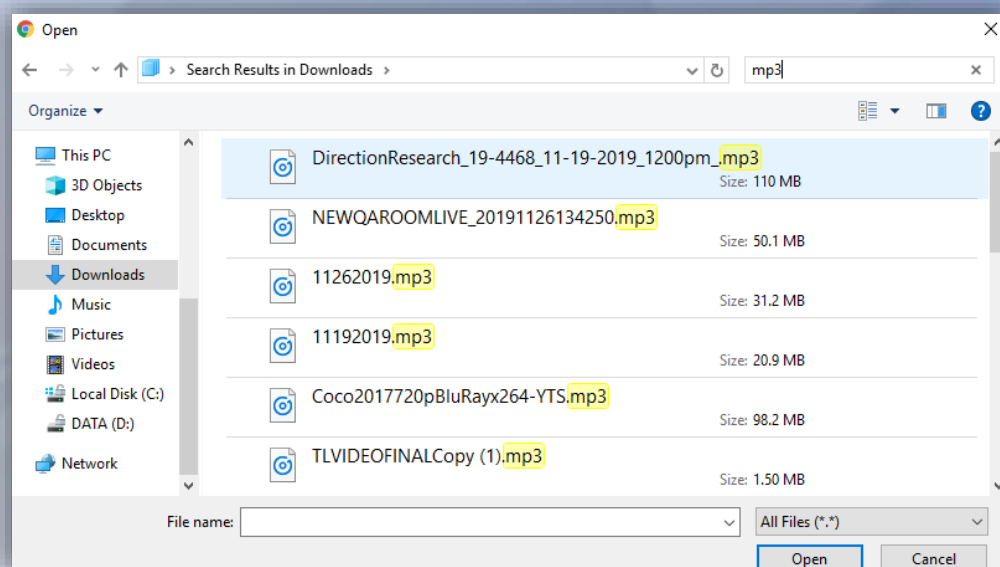
4. Click "Upload" to begin uploading the file.

CALL SUMMARIES (REPORTS)

View reports

1. Click "Call summaries" under Reports through the main menu.
2. Report on call summaries for the current month and year is the default which the page displays.
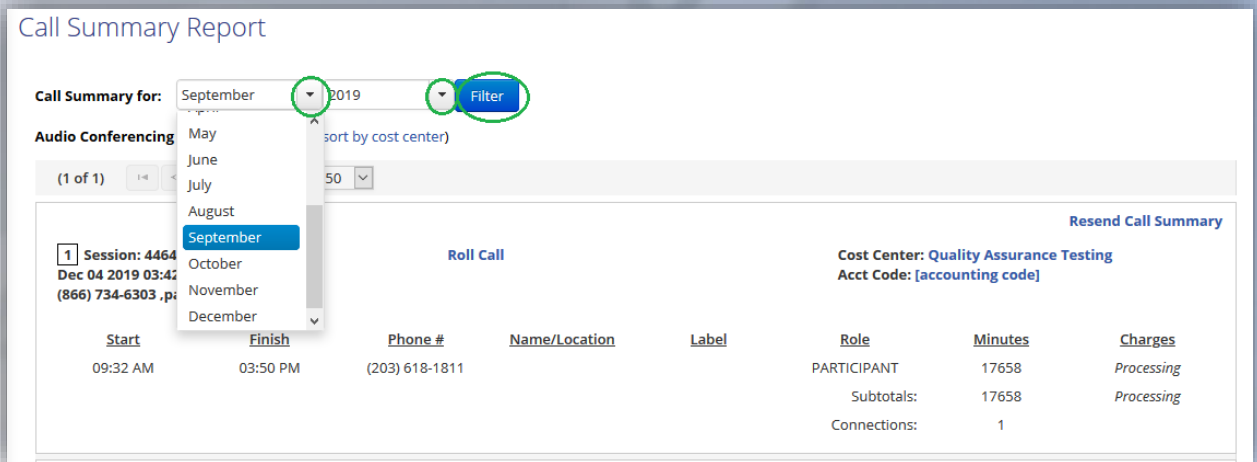
3. To access a previous month and/or year, click drop down button for lists of month and year then click filter button.

4. Sorting option is also available and can be set in either chronological (date sequence from latest to oldest) or cost center (if any, alphabetical order).

5. The following are details that can be edited:
   a. Name or location
   b. Cost center
   c. Accounting code
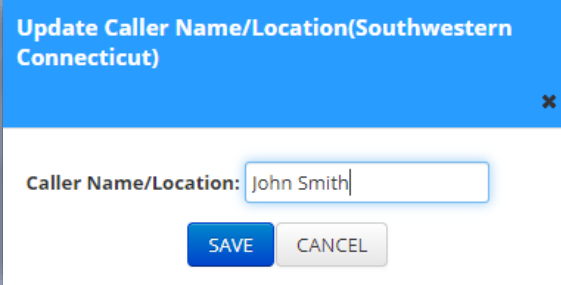
6. Depending on the detail selected to be modified, a window comes up to enter the information.
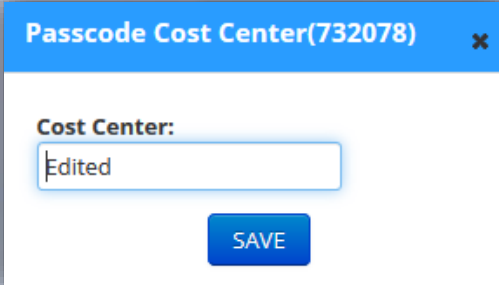
    a. Name / Location
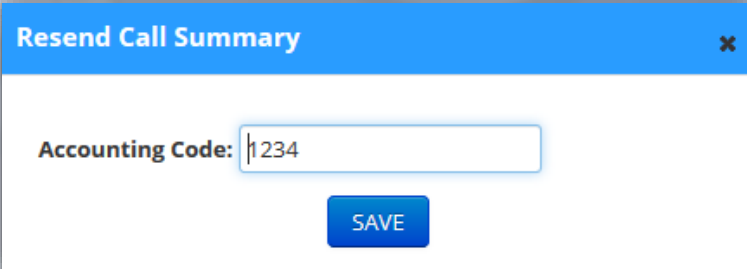
    b. Cost center

    c. Accounting code

Sending call summary

1. Click "Resend call summary" under call summary report page then a window comes up.

2. Enter recipient's email address through the email box. In case of multiple recipients, enter the email addresses followed by either comma (,), single space, or semicolon (;) as separator then click send.

EMAIL REPORTS

This page contains past call summary reports. In case you need single or multiple copies of call summaries for your passcodes, you may go to this page and have them sent via email.
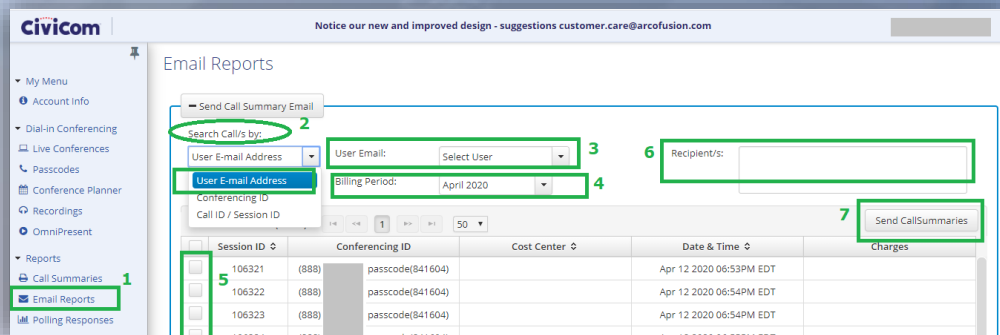
NOTE: Managers will be able to access and email call summary reports both their own and all users under the account. Users under the account can access and email the same report for their own account only.

Search for the call summaries using either of the following:
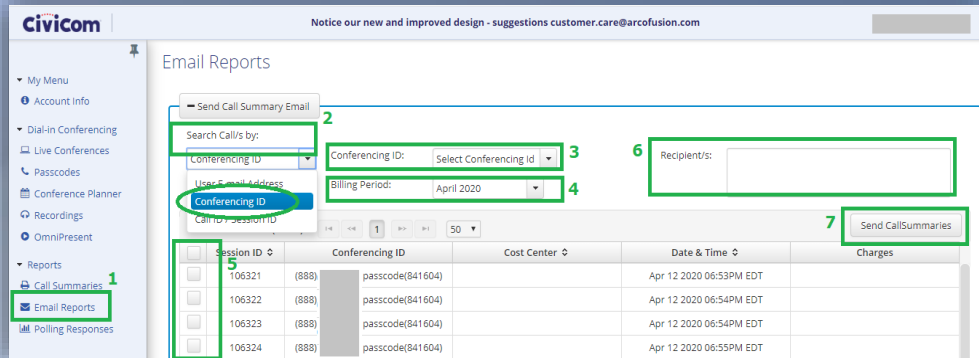
A. User email address
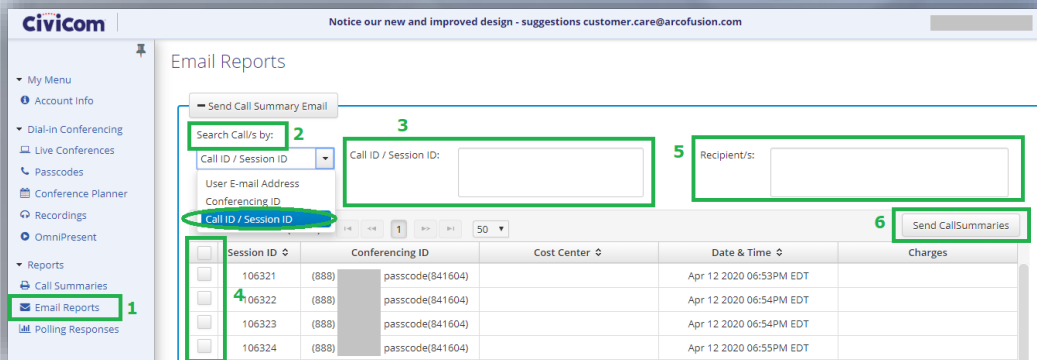

1. Go to email reports page.
2. Under "Search call/s by," select "User email address"
3. Select user email inside the dropdown list.
4. Click drop down box and select the month and year for billing period.
5. Select by placing a checkmark on the conference you wish to get the call summary report.
6. Enter email address/es of those report recipients.
7. Click on "Send call summaries" button.

B. Conferencing ID (passcodes)

1. Go to email reports page.
2. Under "Search call/s by," select "Conferencing ID"
3. Select the passcode under the dropdown list.
4. Click drop down box and select the month and year for billing period.
5. Select by placing a checkmark on the conference you wish to get the call summary report.
6. Enter email address/es of those report recipients.
7. Click on "Send call summaries" button.
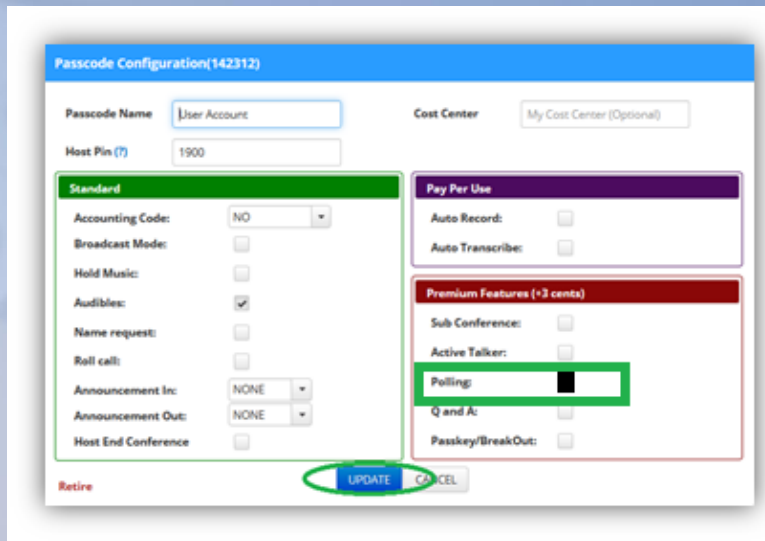
C. Call ID / Session ID

1. Go to email reports page.
2. Under "Search call/s by," select "Call ID / Session ID"
3. Enter the session ID to filter which report is needed.
4. Select by placing a checkmark on the conference you wish to get the call summary report.
5. Enter email address/es of those report recipients.
6. Click on "Send call summaries" button.

POLLING QUESTIONS AND RESPONSES

Before the conference:

   A. Go to passcode page, select the passcode, then go to configuration under action.
   B. Enable polling then update configuration.

C. To set-up polling questions for your conference:
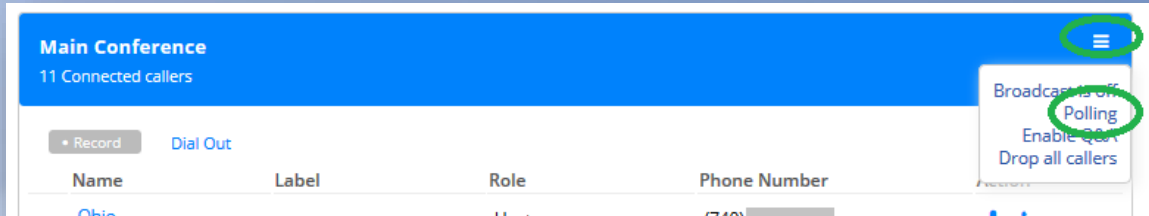1. Go to "Conference planner"
2. Go to "Polling questions" tab.
3. Place your question set name.
4. Enter the first question.
5. Enter the possible choices of answers. Take note that participants should key it in using their phone keypad during polling part of the call.
6. Click "Add question" to save the question. Click next question to set another one (if needed)
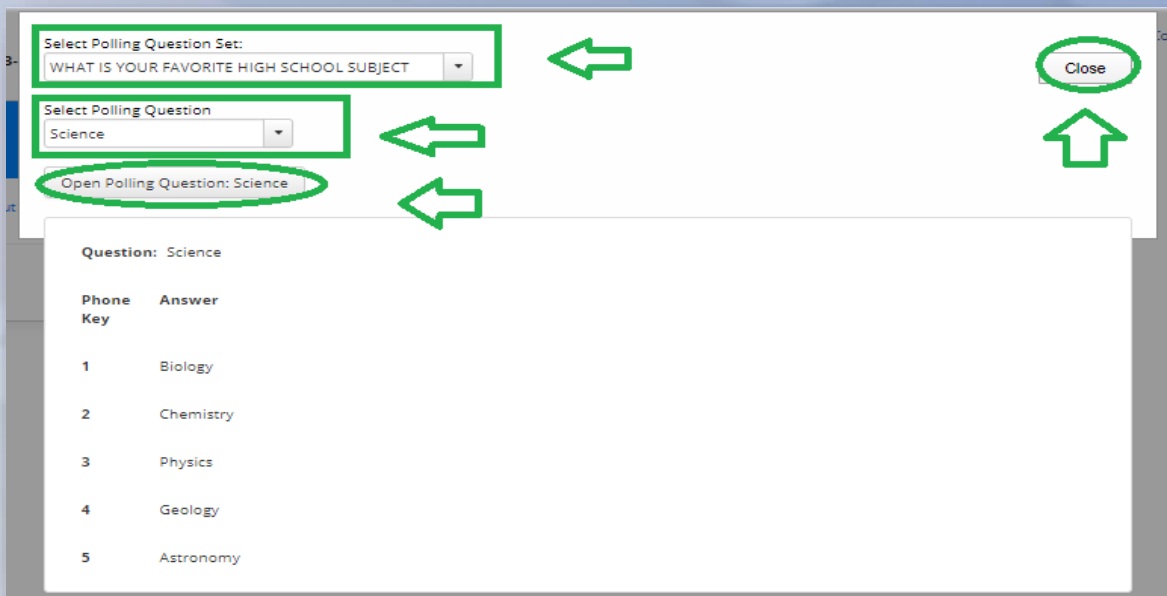7. Once all questions set are complete, click on save question set.
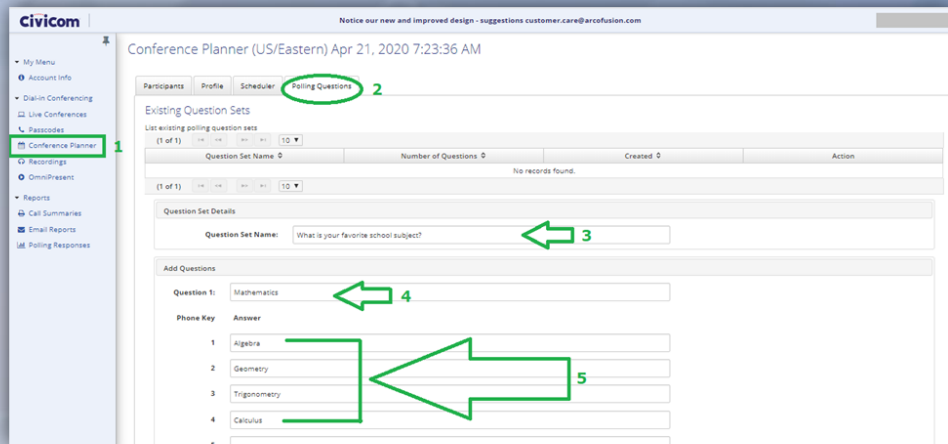
During the conference:
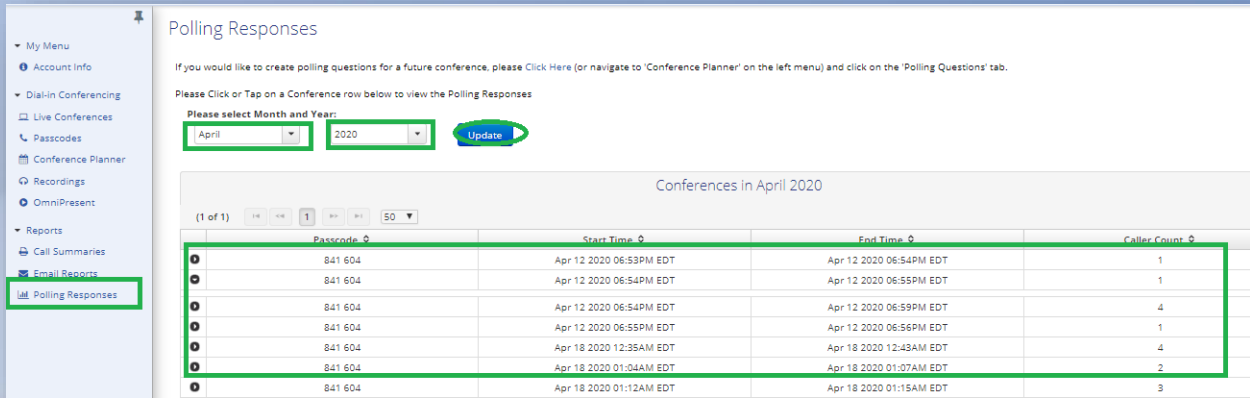
1. Click on the menu icon the select "Polling."

2. A window comes up then select the following:
   a. Polling question set
   b. Polling question
3. Click "Open polling question…" button then CLOSE button.

4. Once enabled, a polling column comes up. You may inform participants about the choices for answers then have them key it in using their phone keypad.
5. The polling response through live call monitor shows up all responses that are entered by each participant.
6. In case you need to go to the next polling question, go to the menu icon again then do steps 1 to 3 (repeat when necessary).
7. Once polling is done, go to the menu icon then select polling. Window screen comes up then click "Close polling question…" then click "Close" button to close the window.

After the conference:

1. Go to "Polling responses" page.
2. Select the month and year then click update
3. Select the applicable passcode the dropdown button at the left side.
4. Polling results in percentage should display in each response.