



CONFERENCE

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.

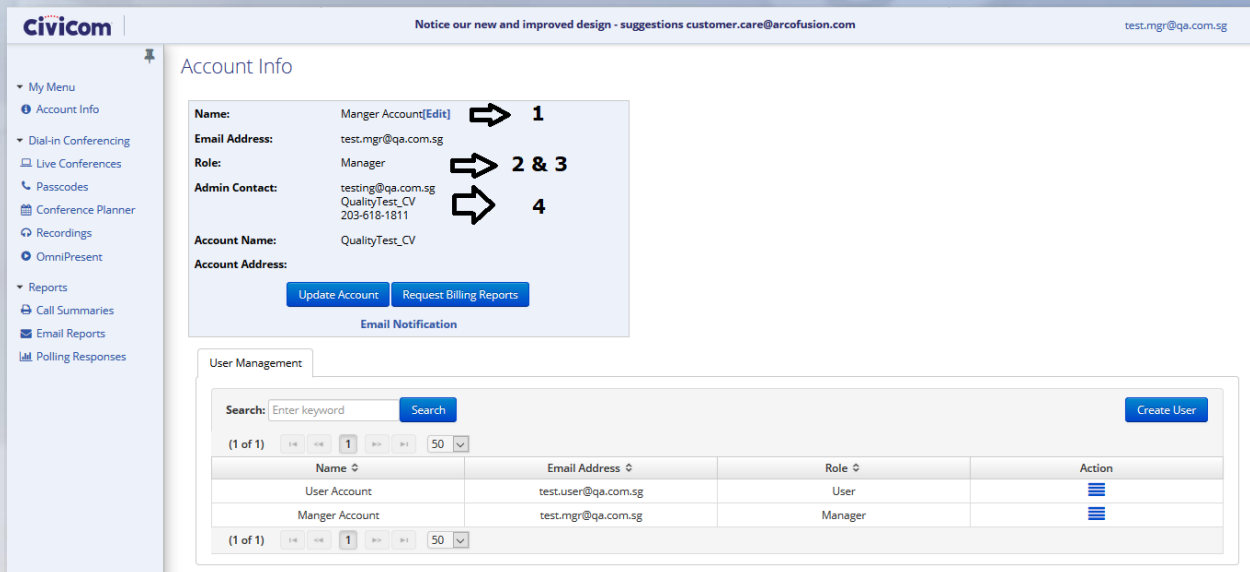
Password

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:



The screenshot shows the Civicom web interface. At the top, there is a navigation bar with the Civicom logo, a notice about a new design, and the user's email address (test.mgr@qa.com.sg). On the left is a sidebar menu with options like My Menu, Account Info, Dial-in Conferencing, Live Conferences, Passcodes, Conference Planner, Recordings, OmniPresent, Reports, Call Summaries, Email Reports, and Polling Responses. The main content area is titled "Account Info" and displays the following details:

- Name:** Manger Account[Edit] → 1
- Email Address:** test.mgr@qa.com.sg
- Role:** Manager → 2 & 3
- Admin Contact:** testing@qa.com.sg → 4
QualityTest_CV
203-618-1811
- Account Name:** QualityTest_CV
- Account Address:** [Buttons: Update Account, Request Billing Reports]

Below the account info is a "User Management" section with a search bar and a table of users:

Name	Email Address	Role	Action
User Account	test.user@qa.com.sg	User	[Edit]
Manger Account	test.mgr@qa.com.sg	Manager	[Edit]

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

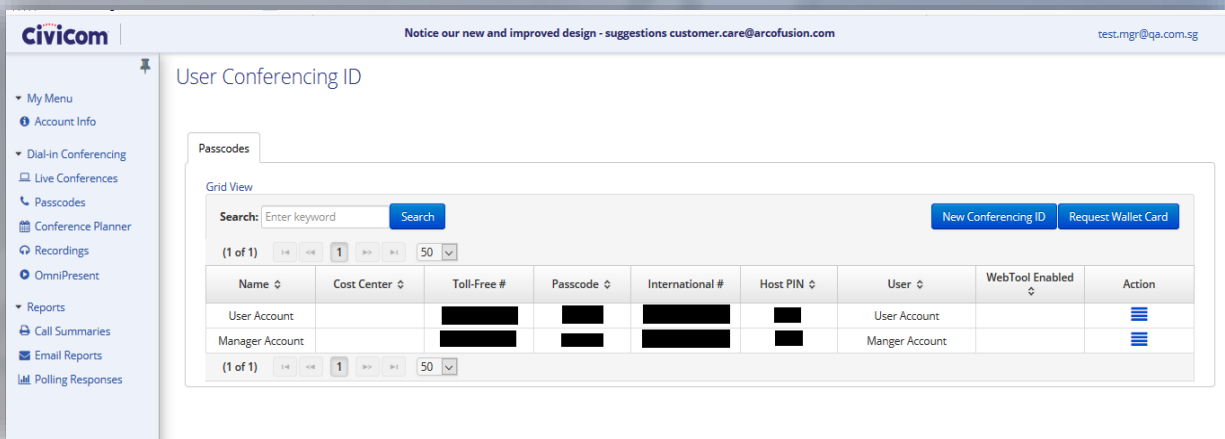
User roles (also known as the “Sub” account) can be the account holder’s moderators or hosts. They also have the ability to manage calls and access recordings but is limited to passcodes assigned to their account.

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.



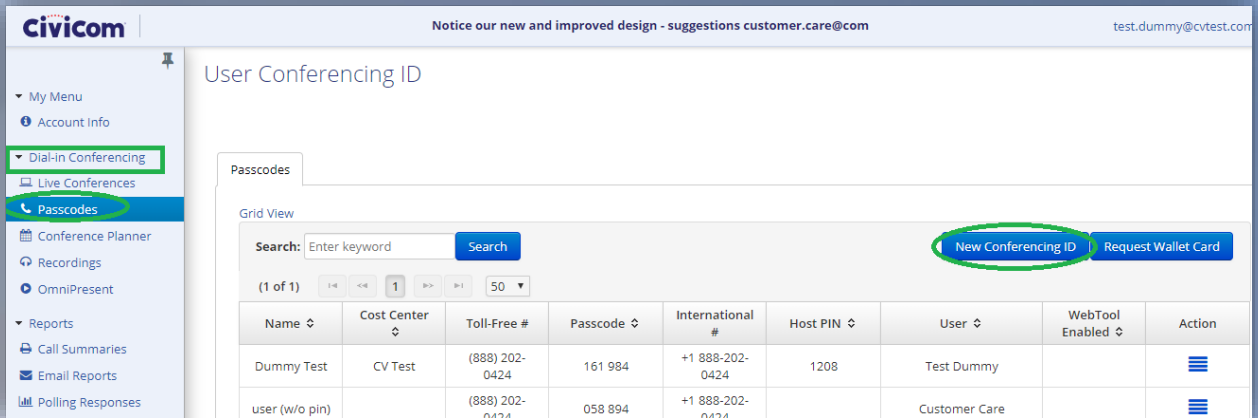
The screenshot shows the 'User Conferencing ID' page in the Civicom interface. The page includes a search bar, a table of passcodes, and navigation buttons. The table has columns for Name, Cost Center, Toll-Free #, Passcode, International #, Host PIN, User, WebTool Enabled, and Action.

Name	Cost Center	Toll-Free #	Passcode	International #	Host PIN	User	WebTool Enabled	Action
User Account						User Account		
Manager Account						Manager Account		



GENERATE NEW PASSCODE

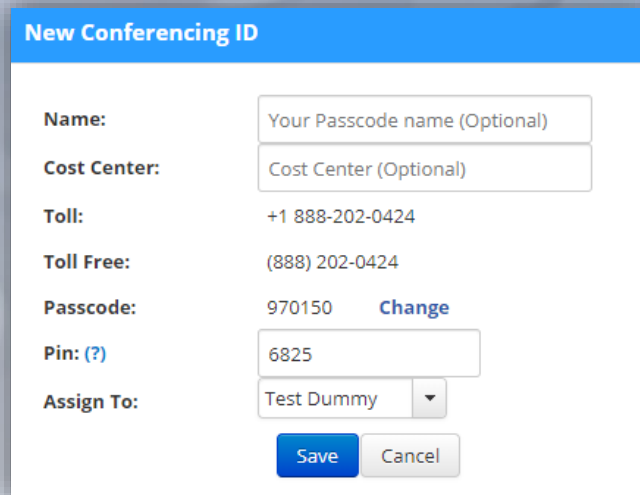
1. Click "New Conferencing ID" through passcodes under dial in conferencing and a new passcode will be randomly created.



The screenshot shows the Civicom web interface for managing conferencing IDs. The left sidebar contains a navigation menu with 'Passcodes' selected. The main content area displays a table of existing passcodes. A 'New Conferencing ID' button is highlighted with a green circle.

Name	Cost Center	Toll-Free #	Passcode	International #	Host PIN	User	WebTool Enabled	Action
Dummy Test	CV Test	(888) 202-0424	161 984	+1 888-202-0424	1208	Test Dummy		
user (w/o pin)		(888) 202-0424	058 894	+1 888-202-0424		Customer Care		

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.



The 'New Conferencing ID' modal window displays the following fields and values:

- Name:** Your Passcode name (Optional)
- Cost Center:** Cost Center (Optional)
- Toll:** +1 888-202-0424
- Toll Free:** (888) 202-0424
- Passcode:** 970150 [Change](#)
- Pin: (?)** 6825
- Assign To:** Test Dummy

Buttons: [Save](#) [Cancel](#)

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.

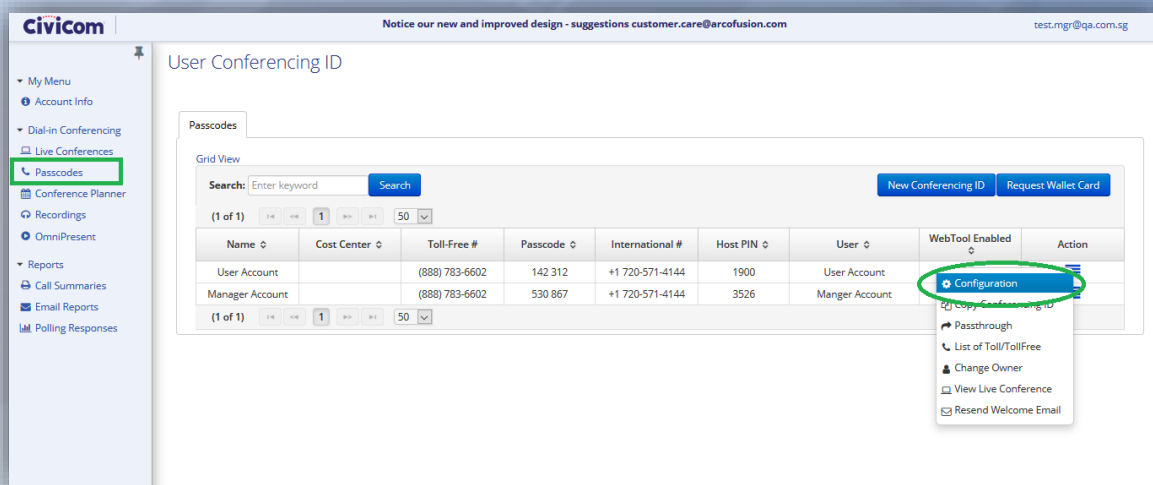
ACTION: Configuration

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.

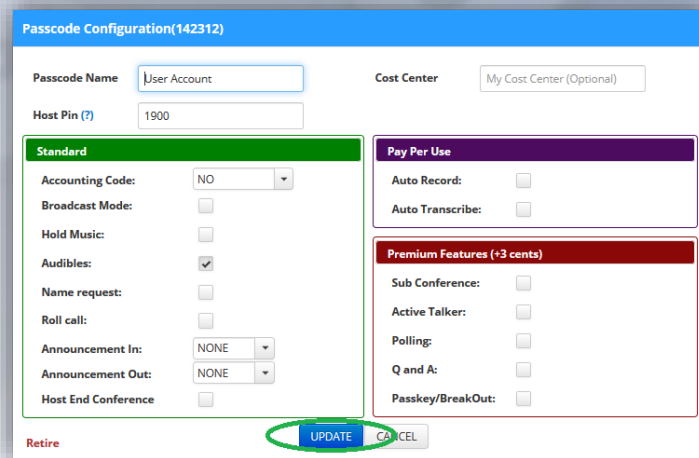
MODIFY PASSCODE DETAILS AND OWNER

Passcode details:

1. Click "Passcodes" under dial in conferencing.
2. Search for the passcode then click "Configuration" under the action drop down list.



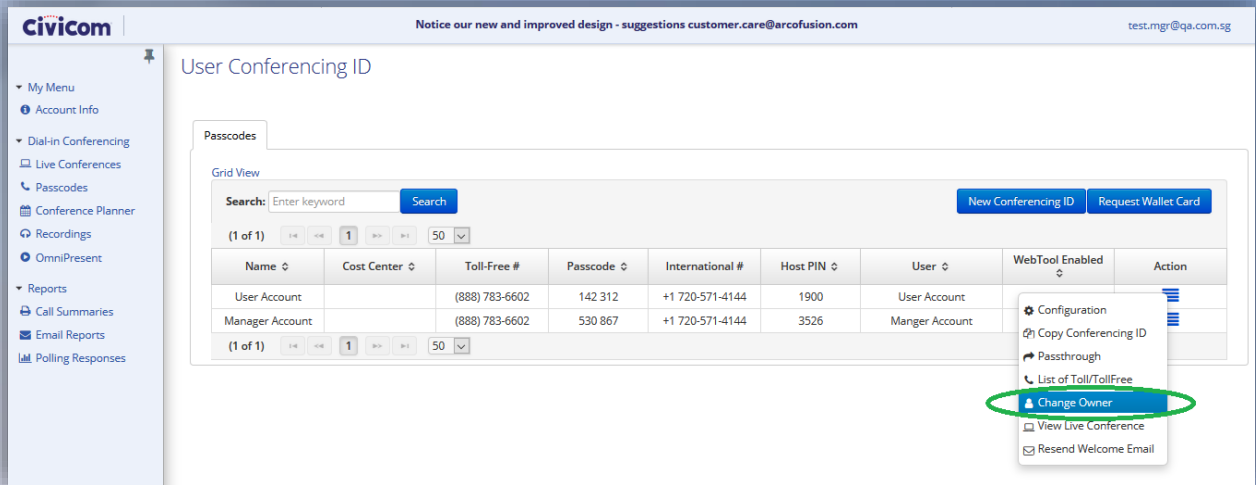
3. Set-up conference features needed through the passcode configuration window then click "Update."



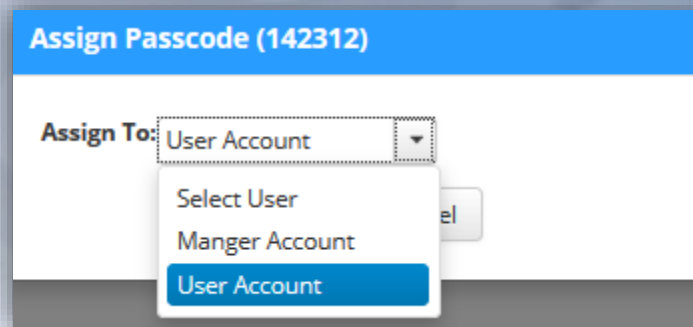
ACTION: Change owner

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.

Passcode Configuration(161984)

Passcode Name

Host Pin (?)

Cost Center

Standard

Accounting Code:

Broadcast Mode:

Hold Music:

Audibles:

Name request:

Roll call:

Announcement In:

Announcement Out:

Host End Conference

Pay Per Use

Auto Record:

Auto Transcribe:

Premium Features (+3 cents)

Sub Conference:

Active Talker:

Polling:

Q and A:

Passkey/BreakOut:

Retire

UPDATE

CANCEL

Remove Passcode Confirmation

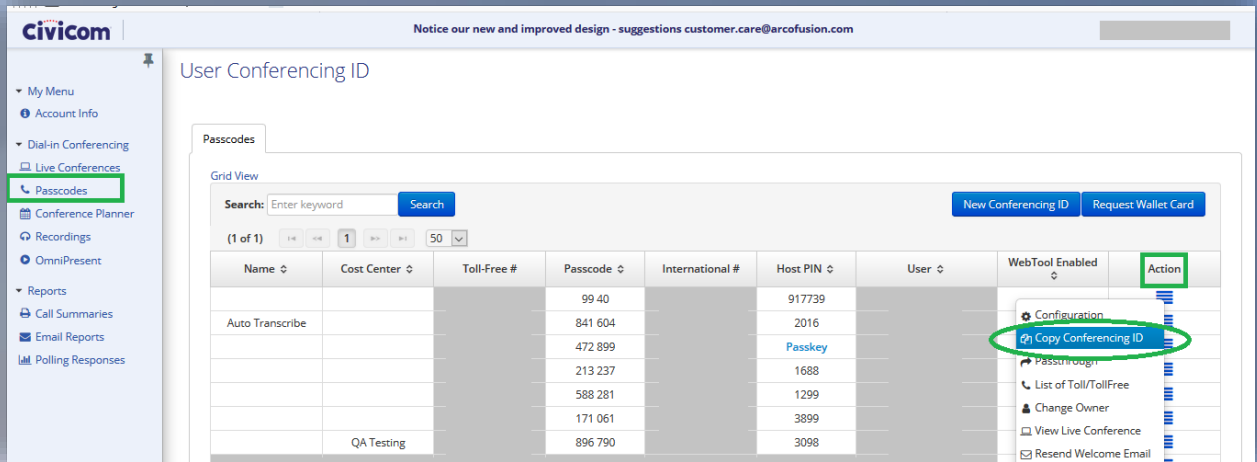
Are you sure you want to remove this Passcode(161984) ?

YES

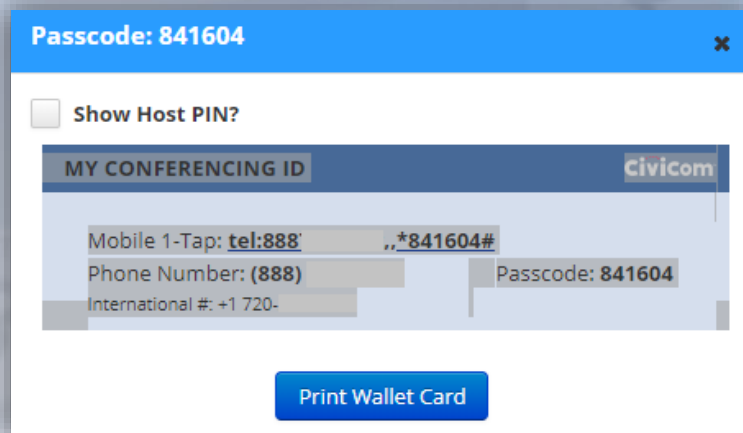
NO

ACTION: Copy Conferencing ID

1. Still in "Passcodes" page, under "Action" click on "Copy conferencing ID."

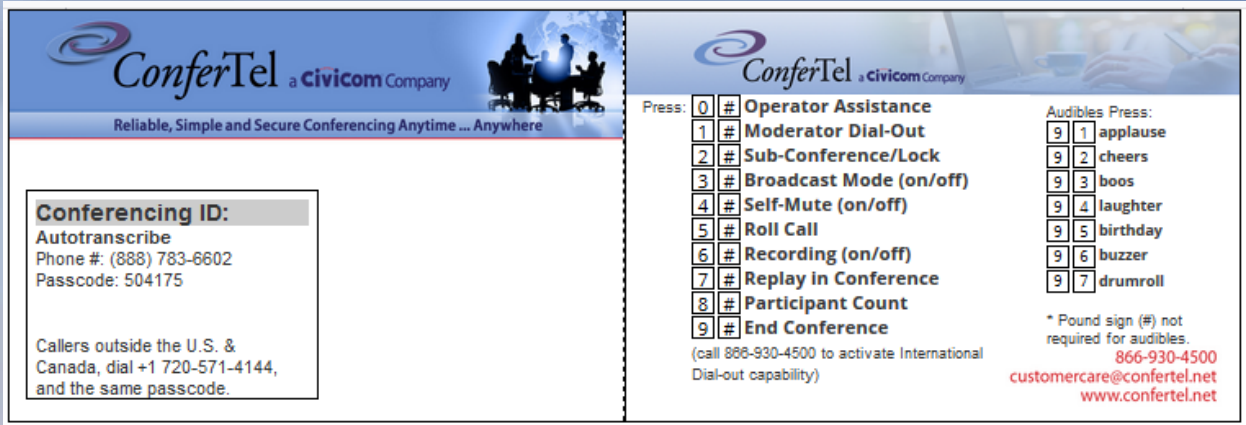


2. A pop-up window comes up which has the details of the conferencing ID (passcode). Depending on your browser, either screen will prompt "Copy to clipboard" then click "Ok" to land on the pop-up screen below or it lands directly to the screen below the click on "Copy to clipboard" on the same window.



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.

- 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).



Conferencing ID:
Autotranscribe
Phone #: (888) 783-6602
Passcode: 504175

Callers outside the U.S. & Canada, dial +1 720-571-4144, and the same passcode.

Press:

0	#	Operator Assistance
1	#	Moderator Dial-Out
2	#	Sub-Conference/Lock
3	#	Broadcast Mode (on/off)
4	#	Self-Mute (on/off)
5	#	Roll Call
6	#	Recording (on/off)
7	#	Replay in Conference
8	#	Participant Count
9	#	End Conference

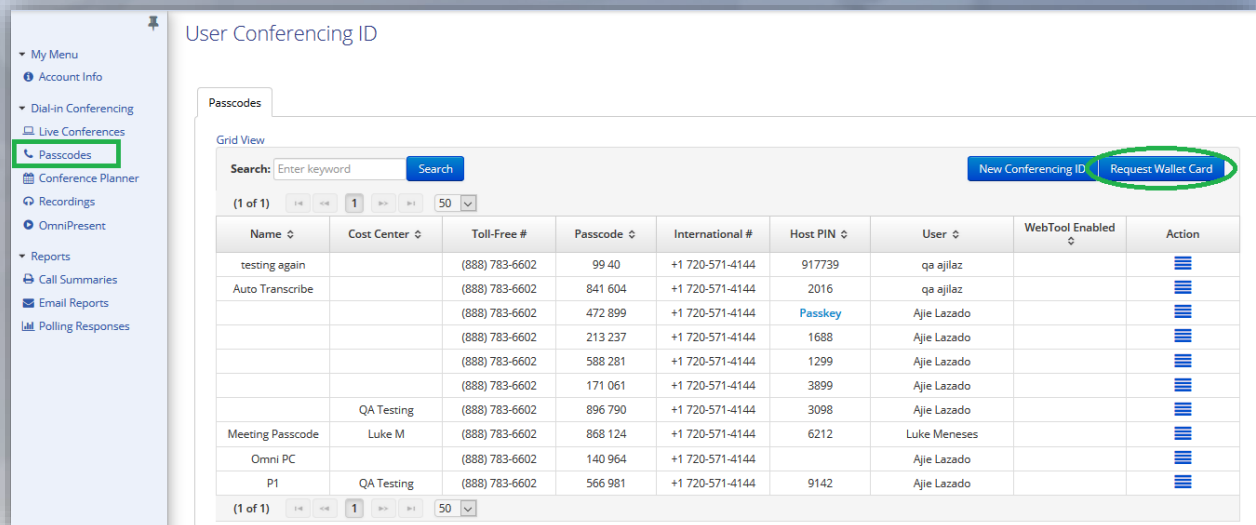
(call 888-930-4500 to activate International Dial-out capability)

Audibles Press:

9	1	applause
9	2	cheers
9	3	boos
9	4	laughter
9	5	birthday
9	6	buzzer
9	7	drumroll

* Pound sign (#) not required for audibles.
866-930-4500
customer@confertel.net
www.confertel.net

- In case you need wallet card for multiple passcodes, on Passcodes page click "Request wallet card" button.



User Conferencing ID

Passcodes

Grid View

Search: Enter keyword

[New Conferencing ID](#) [Request Wallet Card](#)

Name	Cost Center	Toll-Free #	Passcode	International #	Host PIN	User	WebTool Enabled	Action
testing again		(888) 783-6602	99 40	+1 720-571-4144	917739	qa ajilaz		
Auto Transcribe		(888) 783-6602	841 604	+1 720-571-4144	2016	qa ajilaz		
		(888) 783-6602	472 899	+1 720-571-4144	Passkey	Ajie Lazado		
		(888) 783-6602	213 237	+1 720-571-4144	1688	Ajie Lazado		
		(888) 783-6602	588 281	+1 720-571-4144	1299	Ajie Lazado		
		(888) 783-6602	171 061	+1 720-571-4144	3899	Ajie Lazado		
	QA Testing	(888) 783-6602	896 790	+1 720-571-4144	3098	Ajie Lazado		
Meeting Passcode	Luke M	(888) 783-6602	868 124	+1 720-571-4144	6212	Luke Meneses		
Omni PC		(888) 783-6602	140 964	+1 720-571-4144		Ajie Lazado		
P1	QA Testing	(888) 783-6602	566 981	+1 720-571-4144	9142	Ajie Lazado		



- 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).

Wallet Cards

Search:

Name	Cost Center	Toll-Free	Passcode	Card (Print)	Request (Email)	How many (?)
	QA Testing		566981	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>
			140964	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>
Meeting Passcode			868124	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>
	QA Testing		896790	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>
			171061	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>
			588281	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>

You can print virtual wallet cards by clicking on the print link under the Wallet Card column.

To request hard copy of the wallet card to be sent via mail, click the EMAIL checkbox, then press the continue button. Please note that wallet cards are mailed once a week.

Cost is \$0.59 per card. If request is for 3 or more cards, the first two cards (per passcode) are free.

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.

User Conferencing ID

Passcodes

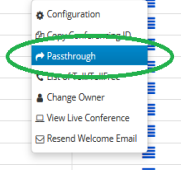
Grid View

Search: Enter keyword

(1 of 1)

Name	Cost Center	Toll-Free #	Passcode	International #	Host PIN	User	WebTool Enabled	Action
testing again		(888) 783-6602	99 40	+1 720-571-4144	917739	qa ajilaz		
Auto Transcribe		(888) 783-6602	841 604	+1 720-571-4144	2016	qa ajilaz		
		(888) 783-6602	472 899	+1 720-571-4144	Passkey	Ajje Lazado		
		(888) 783-6602	213 237	+1 720-571-4144	1688	Ajje Lazado		
		(888) 783-6602	588 281	+1 720-571-4144	1299	Ajje Lazado		
		(888) 783-6602	171 061	+1 720-571-4144	3899	Ajje Lazado		
	QA Testing	(888) 783-6602	896 790	+1 720-571-4144	3098	Ajje Lazado		
Meeting Passcode	Luke M	(888) 783-6602	868 124	+1 720-571-4144	6212	Luke Meneses		
Omni PC		(888) 783-6602	140 964	+1 720-571-4144		Ajje Lazado		
P1	QA Testing	(888) 783-6602	566 981	+1 720-571-4144	9142	Ajje Lazado		

(1 of 1)



Input telephone number then click ADD button.

Passthrough(841604)

Telephone Number: *

TELEPHONE NUMBER	ACTIVE	ACTION
No records found.		

Passthrough(841604)

Telephone Number: *

TELEPHONE NUMBER	ACTIVE	ACTION
203-123-4567	<input type="button" value="YES"/>	<input type="button" value="X"/>

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.

User Conferencing ID

Passcodes

Grid View

Search: Enter keyword New Conferencing ID Request Wallet Card

(1 of 1)

Name	Cost Center	Toll-Free #	Passcode	International #	Host PIN	User	WebTool Enabled	Action
			99 40		917739			
Auto Transcribe			841 604		2016			
			472 899		Passkey			
			213 237		1688			
			588 281		1299			
			171 061		3899			
QA Testing			896 790		3098			
			868 124		6212			
			140 964					
QA Testing			566 981		9142			

(1 of 1)

- Configuration
- Copy Conferencing ID
- Passthrough
- List of Toll/TollFree
- Change Owner
- View Live Conference
- Resend Welcome Email

Toll/Toll-Free: 9940

Dnis	Name	Type
(888) <input type="text"/>	Civicom Internal Meetings	TOLLFREE
+1 720 <input type="text"/>	NuWave DID <input type="text"/>	TOLL



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.

User Conferencing ID

Passcodes

Grid View

Search: Enter keyword Search New Conferencing ID Request Wallet Card

(1 of 1) 50

Name	Cost Center	Toll-Free #	Passcode	International #	Host PIN	User	WebTool Enabled	Action
			99 40		917739			
Auto Transcribe			841 604		2016			
			472 899		Passkey			
			213 237		1688			
			588 281		1299			
			171 061		3899			
	QA Testing		896 790		3098			
			868 124		6212			
			140 964					
	QA Testing		566 981		9142			

(1 of 1) 50

- Configuration
- Copy Conferencing ID
- Passthrough
- List of Toll/Tollfree
- Change Passcode
- View Live Conference**
- Request Welcome Email

Civicom Conference Settings | Create Sub Conference | Listen | End Conference

01:20:28 Passcode: Host PIN:

Main Conference ☰

5 Connected callers

• Recording Dial Out

Name	Label	Role	Phone Number	Action
Civi - <input type="text"/>		Host	1203 <input type="text"/>	
Mod - <input type="text"/>		Host	1609 <input type="text"/>	
California		Participant	1707 <input type="text"/>	
California		Participant	1650 <input type="text"/>	
respondent		Participant	(917) <input type="text"/>	

Hung Up Callers ^

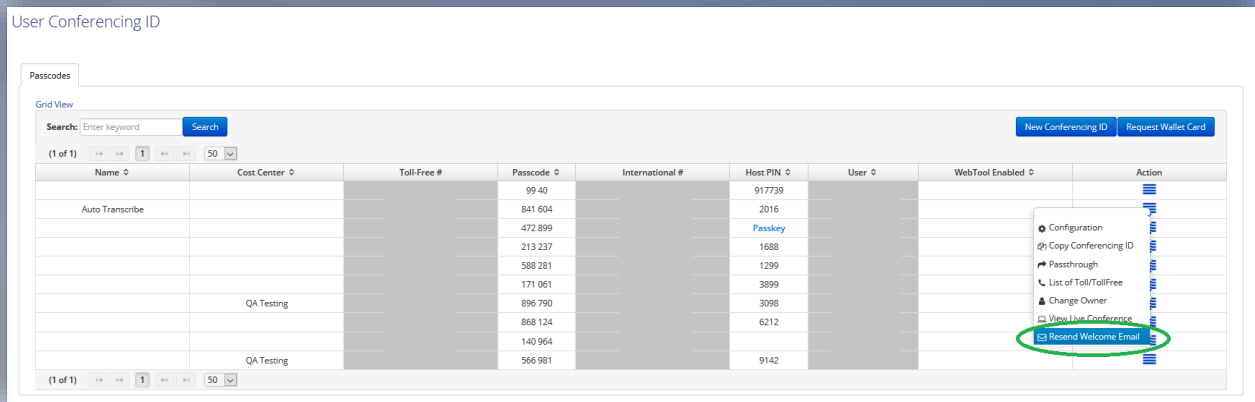
Name	Label	Role	Phone Number	Action	Status	Date & Time
respondent		Participant	(917) <input type="text"/>		Hangup	4/17/2020, 3:03:27 PM

Sub Conference 1 (0) ^ ⓧ

Sub Conference 2 (0) ^ ⓧ

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.



User Conferencing ID

Passcodes

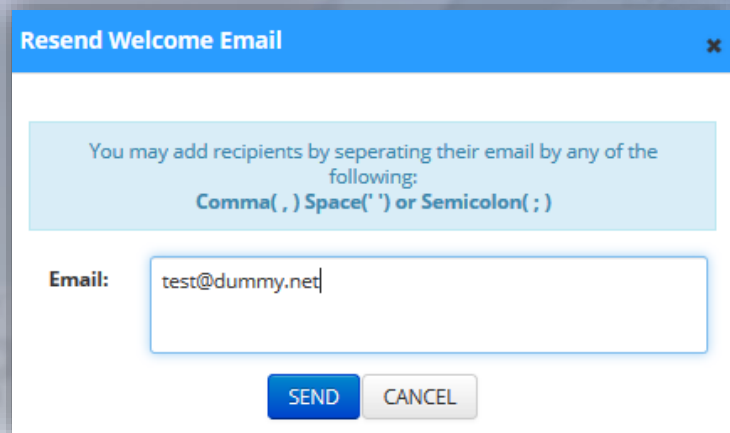
Grid View

Search: Enter keyword Search

Name	Cost Center	Toll-Free #	Passcode	International #	Host PIN	User	WebTool Enabled	Action
			99 40		917739			
Auto Transcribe			841 604		2016			
			472 899		Passkey			
			213 237		1688			
			588 281		1299			
			171 061		3899			
QA Testing			896 790		3098			
			868 124		6212			
			140 964					
QA Testing			566 981		9142			

- Configuration
- Copy Conferencing ID
- Passthrough
- List of Toll/TollFree
- Change Owner
- View User Conference
- Resend Welcome Email**

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



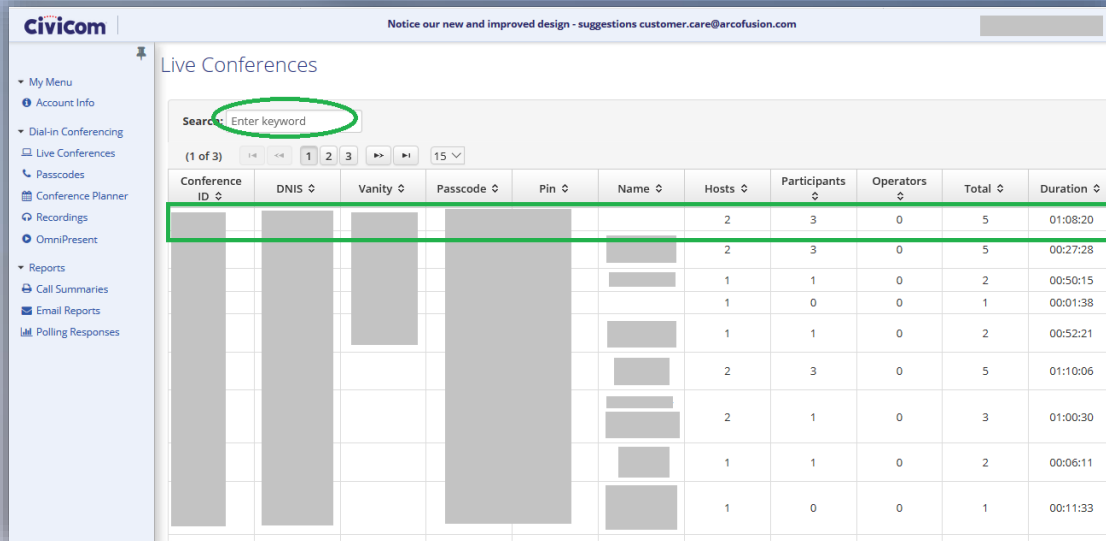
Resend Welcome Email

You may add recipients by seperating their email by any of the following:
Comma (,) Space (' ') or Semicolon (;)

Email:

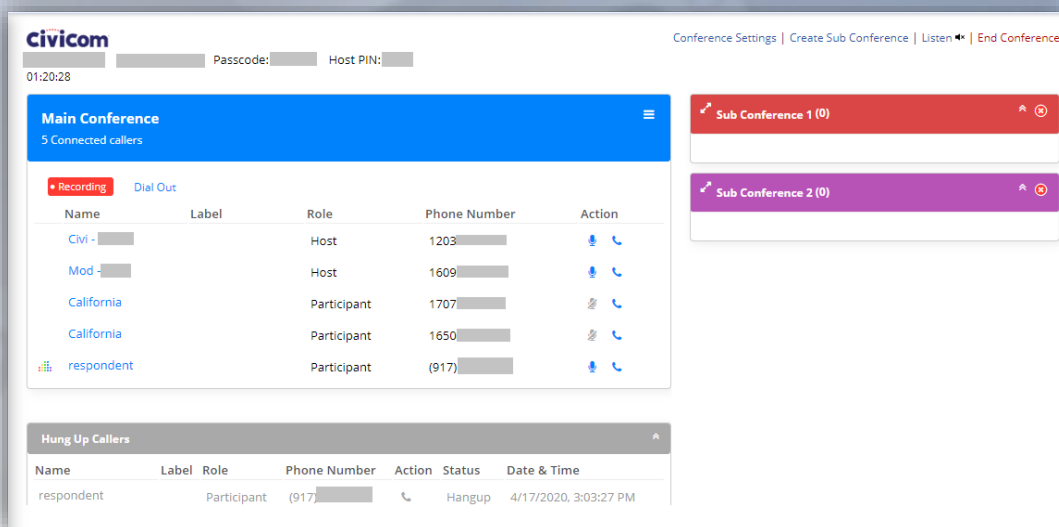
Live Conference

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.



Conference ID	DNIS	Vanity	Passcode	Pin	Name	Hosts	Participants	Operators	Total	Duration
						2	3	0	5	01:08:20
						2	3	0	5	00:27:28
						1	1	0	2	00:50:15
						1	0	0	1	00:01:38
						1	1	0	2	00:52:21
						2	3	0	5	01:10:06
						2	1	0	3	01:00:30
						1	1	0	2	00:06:11
						1	0	0	1	00:11:33

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).

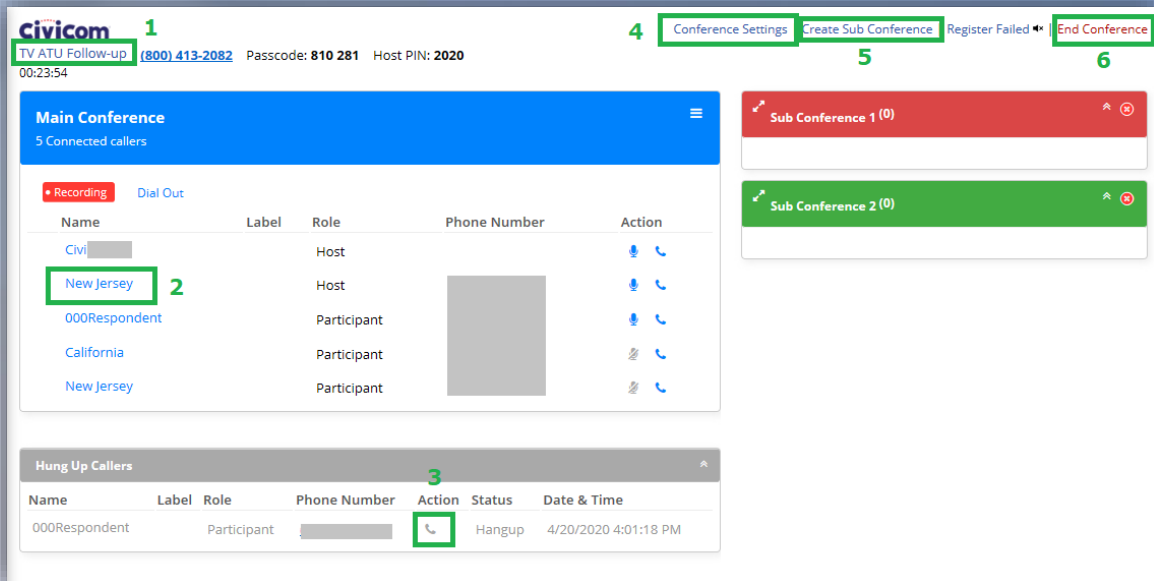


Name	Label	Role	Phone Number	Action
Civi -		Host	1203	
Mod -		Host	1609	
California		Participant	1707	
California		Participant	1650	
respondent		Participant	(917)	

Name	Label	Role	Phone Number	Action	Status	Date & Time
respondent		Participant	(917)		Hangup	4/17/2020, 3:03:27 PM

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:*****



The screenshot shows the ConferTel live conference interface. At the top, the Civicom logo is on the left, and navigation options like 'Conference Settings', 'Create Sub Conference', 'Register Failed', and 'End Conference' are on the right. The main area is divided into 'Main Conference' and 'Hung Up Callers' sections. The 'Main Conference' section shows a list of participants with columns for Name, Label, Role, Phone Number, and Action. The 'Hung Up Callers' section shows a list of callers who have disconnected. Numbered callouts (1-6) highlight specific elements: 1 points to the Cost Center, 2 to a participant name, 3 to a hangup action, 4 to the top navigation bar, 5 to the 'Create Sub Conference' button, and 6 to the 'End Conference' button.

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.

Update Cost Center:

TV ATU Follow-up x

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.

Update Caller Name:

New Jersey x

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 ▾

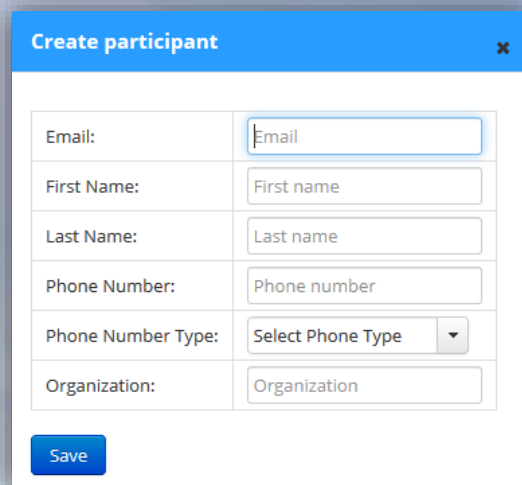
Close

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).

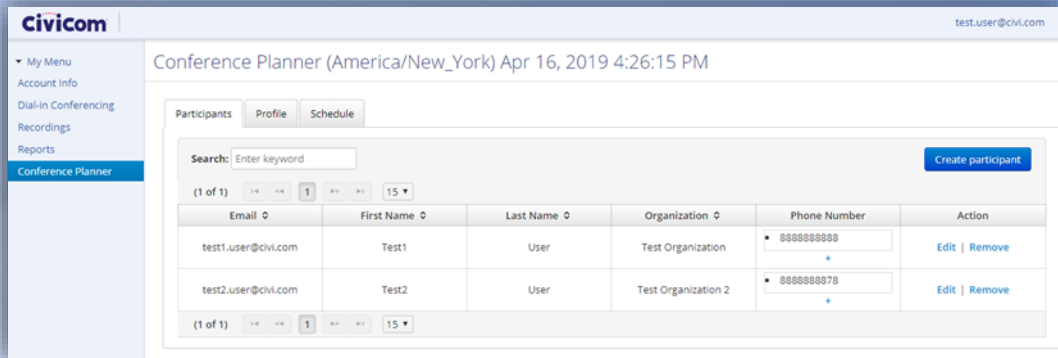


The image shows a 'Create participant' dialog box with a blue header and a close button (x). The form contains the following fields:

Email:	<input type="text" value="Email"/>
First Name:	<input type="text" value="First name"/>
Last Name:	<input type="text" value="Last name"/>
Phone Number:	<input type="text" value="Phone number"/>
Phone Number Type:	<input type="text" value="Select Phone Type"/>
Organization:	<input type="text" value="Organization"/>

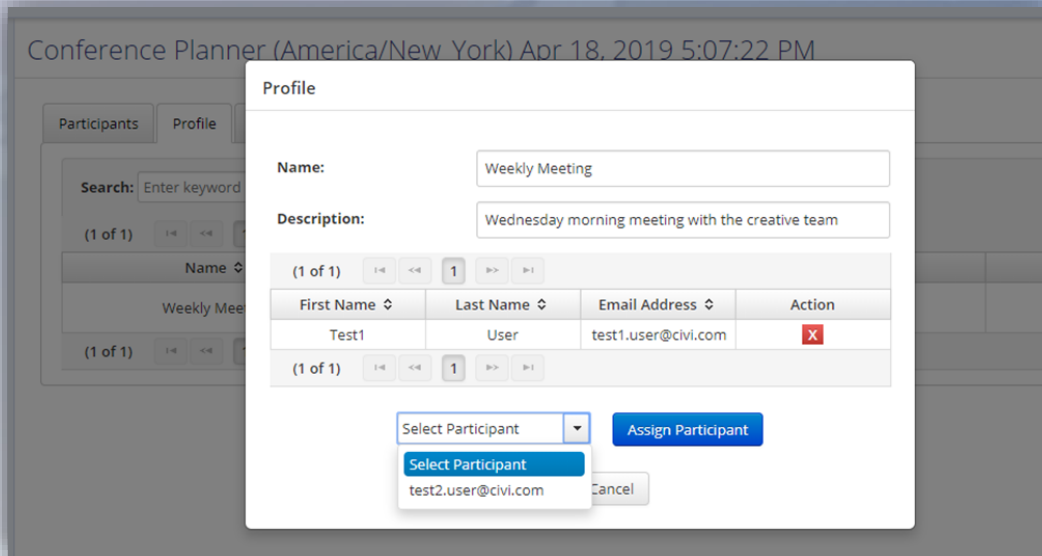
At the bottom left of the dialog box is a blue 'Save' button.

1



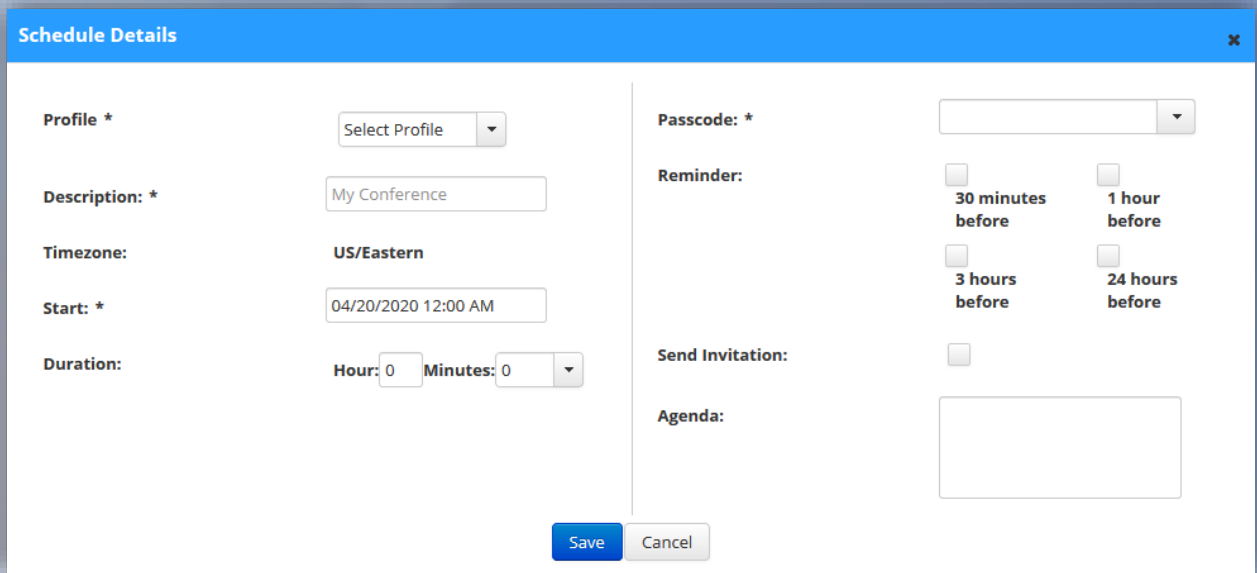
2

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

Description: * My Conference

Timezone: US/Eastern

Start: * 04/20/2020 12:00 AM

Duration: Hour: 0 Minutes: 0

Passcode: *

Reminder:

30 minutes before 1 hour before

3 hours before 24 hours before

Send Invitation:

Agenda:

Save Cancel

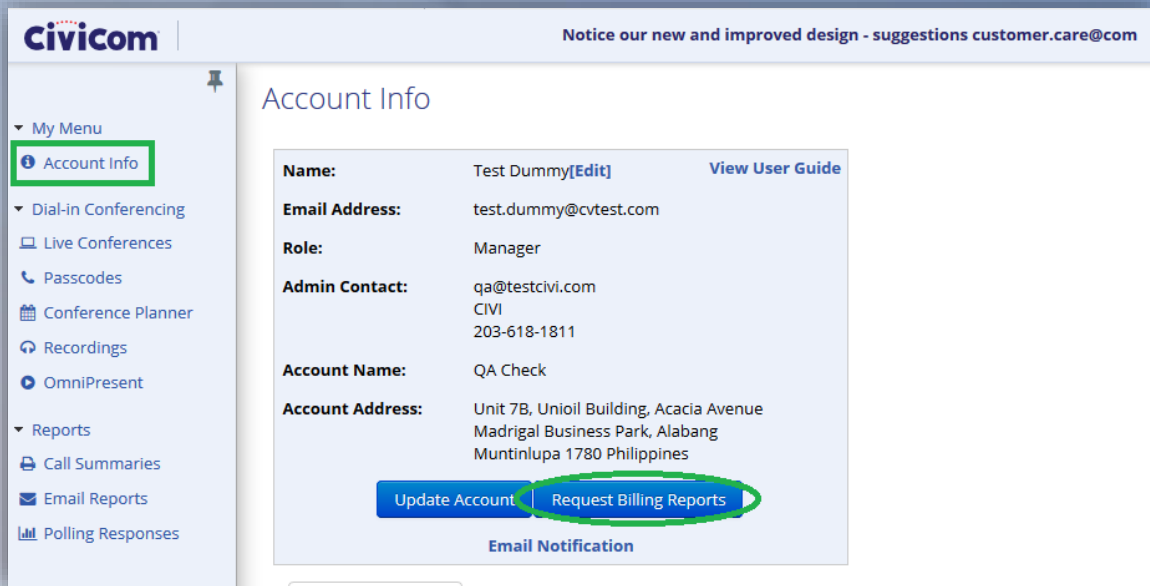
Updating and cancelling the conference will also send an email to your participants.



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.



Civicom | Notice our new and improved design - suggestions customer.care@com

Account Info

Name: Test Dummy[Edit] [View User Guide](#)

Email Address: test.dummy@cvtest.com

Role: Manager

Admin Contact: qa@testcivi.com
CIVI
203-618-1811

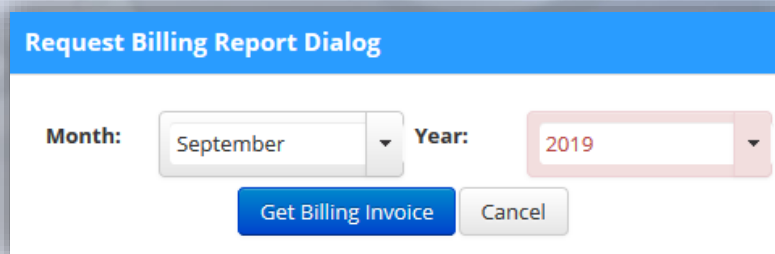
Account Name: QA Check

Account Address: Unit 7B, Unioil Building, Acacia Avenue
Madrigal Business Park, Alabang
Muntinlupa 1780 Philippines

[Update Account](#) [Request Billing Reports](#)

Email Notification

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).



Request Billing Report Dialog

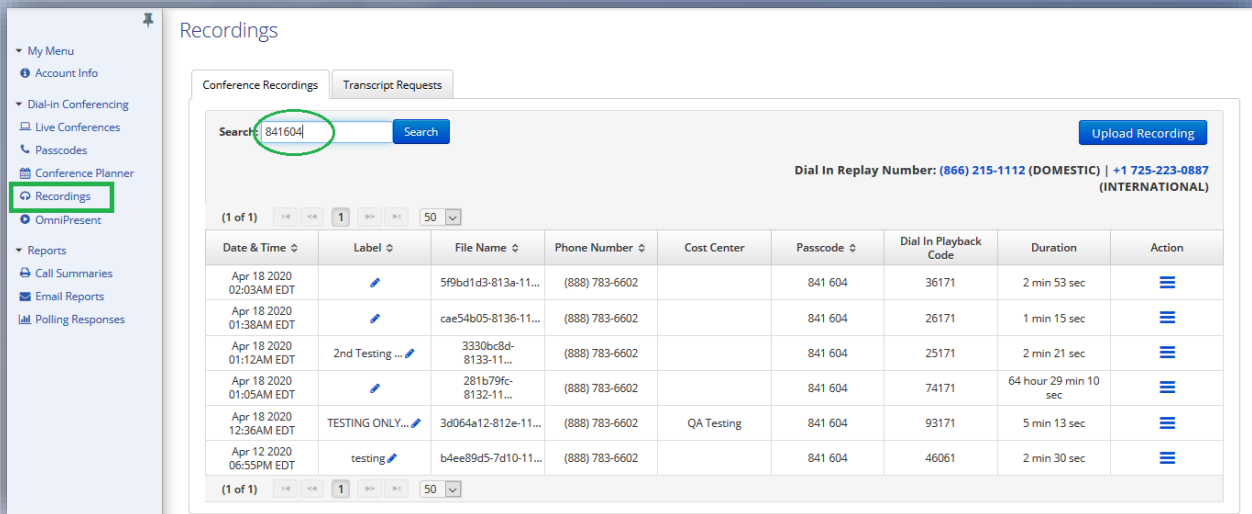
Month: **Year:**

[Get Billing Invoice](#) [Cancel](#)

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.



Recordings

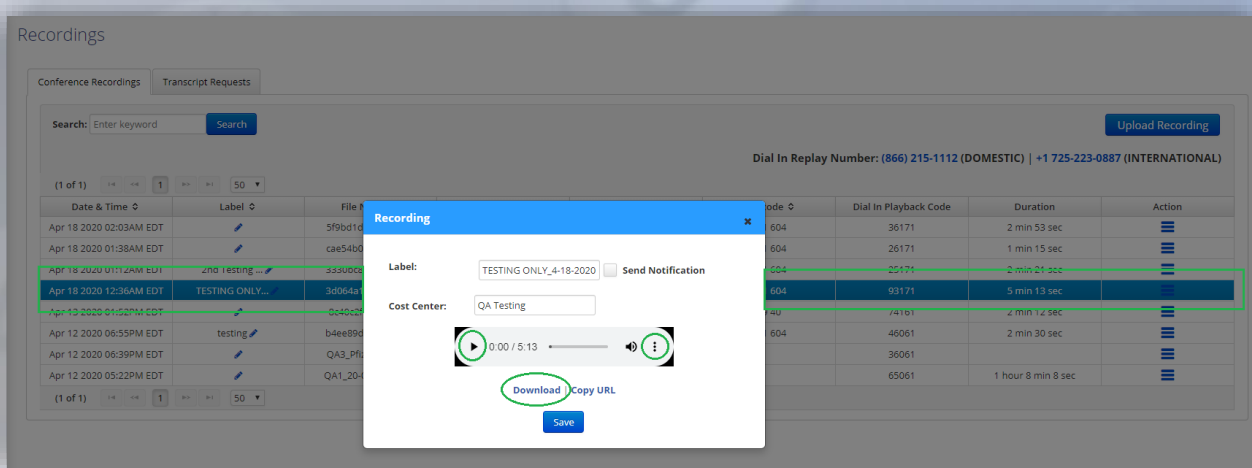
Conference Recordings | Transcript Requests

Search: Search Upload Recording

Dial In Replay Number: (866) 215-1112 (DOMESTIC) | +1 725-223-0887 (INTERNATIONAL)

Date & Time	Label	File Name	Phone Number	Cost Center	Passcode	Dial In Playback Code	Duration	Action
Apr 18 2020 02:03AM EDT		5f9bd1d3-813a-11...	(888) 783-6602		841 604	36171	2 min 53 sec	
Apr 18 2020 01:38AM EDT		cae54b05-8136-11...	(888) 783-6602		841 604	26171	1 min 15 sec	
Apr 18 2020 01:12AM EDT	2nd Testing ...	3330bc8d-8133-11...	(888) 783-6602		841 604	25171	2 min 21 sec	
Apr 18 2020 01:05AM EDT		281b79fc-8132-11...	(888) 783-6602		841 604	74171	64 hour 29 min 10 sec	
Apr 18 2020 12:36AM EDT	TESTING ONLY...	3d064a12-812e-11...	(888) 783-6602	QA Testing	841 604	93171	5 min 13 sec	
Apr 12 2020 06:55PM EDT	testing	b4ee89d5-7d10-11...	(888) 783-6602		841 604	46061	2 min 30 sec	

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.



Recordings

Conference Recordings | Transcript Requests

Search: Search Upload Recording

Dial In Replay Number: (866) 215-1112 (DOMESTIC) | +1 725-223-0887 (INTERNATIONAL)

Date & Time	Label	File Name	Phone Number	Cost Center	Passcode	Dial In Playback Code	Duration	Action
Apr 18 2020 02:03AM EDT		5f9bd1d3-813a-11...	(888) 783-6602		841 604	36171	2 min 53 sec	
Apr 18 2020 01:38AM EDT		cae54b05-8136-11...	(888) 783-6602		841 604	26171	1 min 15 sec	
Apr 18 2020 01:12AM EDT	2nd Testing ...	3330bc8d-8133-11...	(888) 783-6602		841 604	25171	2 min 21 sec	
Apr 18 2020 01:05AM EDT		281b79fc-8132-11...	(888) 783-6602		841 604	74171	64 hour 29 min 10 sec	
Apr 18 2020 12:36AM EDT	TESTING ONLY...	3d064a12-812e-11...	(888) 783-6602	QA Testing	841 604	93171	5 min 13 sec	
Apr 12 2020 06:55PM EDT	testing	b4ee89d5-7d10-11...	(888) 783-6602		841 604	46061	2 min 30 sec	
Apr 12 2020 06:39PM EDT		QA3_P...			36061			
Apr 12 2020 05:22PM EDT		QA1_20...			65061		1 hour 8 min 8 sec	

Recording

Label: Send Notification

Cost Center:

0:00 / 5:13

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.

The screenshot displays the Civicom Recordings page. A modal window titled "Recording" is open, allowing for the customization of a recording's name. The "Label" field is highlighted with a green circle and contains the text "TESTING ONLY_4-18-2020". Below it, the "Cost Center" field is set to "QA Testing". The modal also includes a "Send Notification" button, a media player showing a 0:00 / 5:13 duration, and "Download" and "Copy URL" options. A "Save" button is at the bottom of the modal. In the background, a table of recordings is visible, with one row highlighted in blue. At the bottom of the page, a file download bar shows the filename "TESTING_ONLY_4-18-2020.M4V" (2.2/4.8 MB, 6 secs left), which is also circled in green.

The screenshot shows a web browser address bar with the URL: https://af.civi.com:8443/ws/rest/public/recording/TESTING+ONLY_4-18-2020. The path portion of the URL, "/TESTING+ONLY_4-18-2020", is highlighted with a green box.



Delete recording

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

Recordings

Conference Recordings

Search: Dial In Replay Number: (866) 215-1112 (DOMESTIC) | +1 725-223-0887 (INTERNATIONAL)

(1 of 144) 1 2 3 4 5 6 7 8 9 10 50

Date & Time	Label	Phone Number	Cost Center	Passcode	Dial In Playback Code	Duration	Action
Dec 09 2019 03:22PM EST	Test_QA	(866) 734-6303	Dial out Testing	778 763	9618	4 min 7 sec	
Dec 09 2019 02:25PM EST		(866) 734-6303		770 819	8618	6 min 50 sec	
Dec 09 2019 10:29AM EST		(866) 734-6303	Dial out Testing	778 763	7618	1 min 59 sec	
Dec 04 2019 01:35PM EST		(866) 734-6303	Quality Assurance Testing	732 078	6618	7 min 27 sec	
Dec 04 2019 11:29AM EST		(866) 734-6303	Adobe Sync Testing	367 783	5618	2 min 50 sec	
Dec 03 2019 09:36AM EST		(866) 734-6303	Adobe Sync Testing	367 783	4618	2 min 50 sec	
Dec 02 2019 11:25AM EST		(866) 734-6303		100 001	3618	2 min 50 sec	

Note: In the screenshot, a context menu is open over the 'Remove' button in the last row, with 'Remove' highlighted in green.

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.

Remove Recording

Are you sure you want to remove this recording?

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.



Sending a recording link

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

Recordings							
Dec 03 2019 11:29AM EST		(866) 734-6303	Adobe Sync Testing	367 783	5618	2 min 58 sec	☰
Dec 03 2019 09:36AM EST		(866) 734-6303	Adobe Sync Testing	367 783	4618	59 sec	☰
Dec 02 2019 11:25AM EST		(866) 734-6303		100 001	3618	2 min 30 sec	☰
Nov 29 2019 12:52PM EST		(866) 734-6303	Adobe Sync test	905 661	1618	22 sec	☰
Nov 29 2019 12:51PM EST	Nov29_ArcoTesting	(866) 734-6303	Adobe Sync test	905 661	0618	23 min 45 sec	☰
Nov 28 2019 11:11AM EST	Nov28_ArcoTesting	(866) 734-6303	Adobe Sync test	905 661	9518	23 min 30 sec	☰
Nov 25 2019 09:07AM EST		(866) 734-6303	MGR	738 938	8518	4 min 18 sec	☰
Nov 25 2019 08:58AM EST		(866) 734-6303		985 749	7518	4 min 18 sec	☰

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.

Send Passcode Recording: 905 661

Email:

Request for transcript

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

Recordings							
Dec 01 2019 11:29AM EST		(866) 734-6303	Adobe Sync Testing	367 783	5618	2 min 58 sec	⋮
Dec 03 2019 09:36AM EST		(866) 734-6303	Adobe Sync Testing	367 783	4618	59 sec	⋮
Dec 02 2019 11:25AM EST		(866) 734-6303		100 001	3618	2 min 30 sec	⋮
Nov 29 2019 12:52PM EST		(866) 734-6303	Adobe Sync test	905 661	1618	22 sec	⋮
Nov 29 2019 12:51PM EST	Nov29_ArcoTesting	(866) 734-6303	Adobe Sync test	905 661	0618	23 min 45 sec	⋮
Nov 28 2019 11:11AM EST	Nov28_ArcoTesting	(866) 734-6303	Adobe Sync test	905 661	9518	23 min 20 sec	⋮
Nov 25 2019 09:07AM EST		(866) 734-6303	MGR	738 938	8518		⋮
Nov 25 2019 08:58AM EST		(866) 734-6303		985 749	7518		⋮

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."

Request Service ✕

Cost Center:

Service Requester: ?

Service Type:

Delivery Preference:

Special Instructions:

Know Who ?

Verbatim Pure ?

Verbatim Smart ?

Timestamps ?

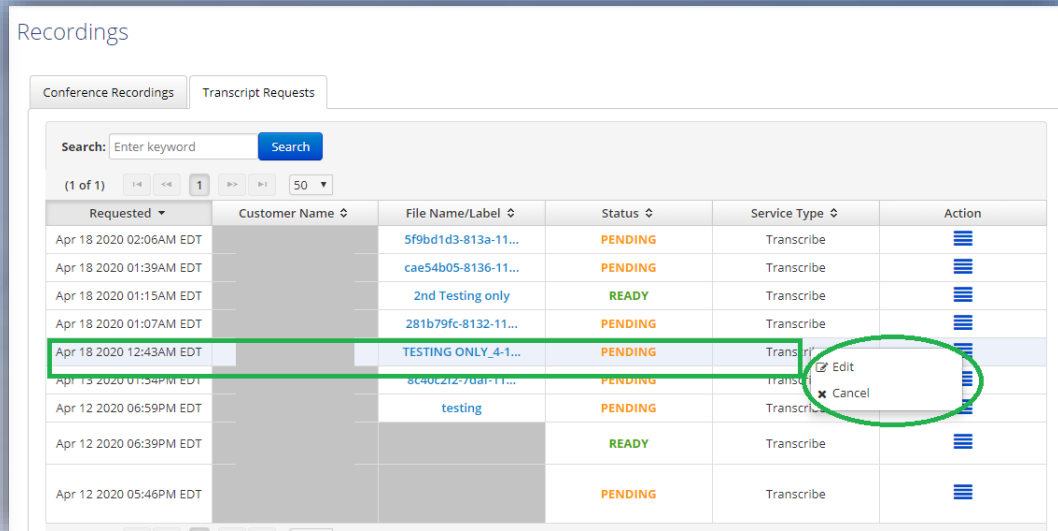
Additional Notes:

Attach Supporting Document: No file chosen

Attach or Select Unique Template:

No file chosen

- 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.



Recordings

Conference Recordings | Transcript Requests

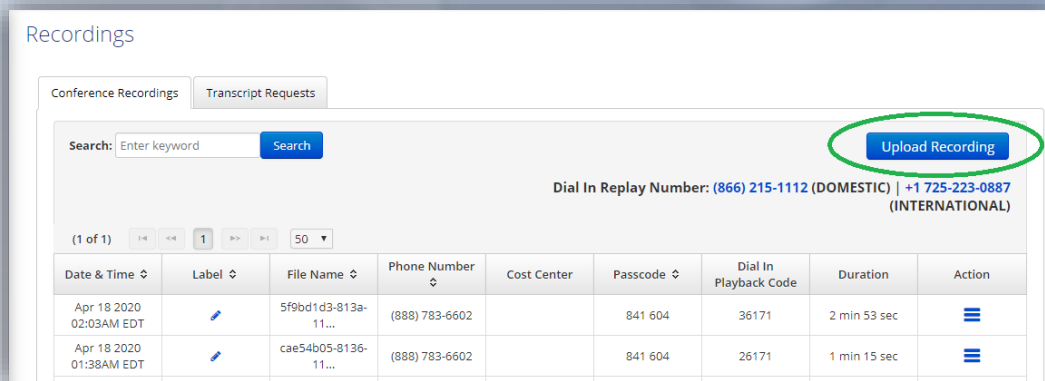
Search: Enter keyword

(1 of 1) | 1 | 50

Requested	Customer Name	File Name/Label	Status	Service Type	Action
Apr 18 2020 02:06AM EDT		5f9bd1d3-813a-11...	PENDING	Transcribe	
Apr 18 2020 01:39AM EDT		cae54b05-8136-11...	PENDING	Transcribe	
Apr 18 2020 01:15AM EDT		2nd Testing only	READY	Transcribe	
Apr 18 2020 01:07AM EDT		281b79fc-8132-11...	PENDING	Transcribe	
Apr 18 2020 12:43AM EDT		TESTING ONLY_4-1...	PENDING	Transcribe	
Apr 13 2020 01:54PM EDT		8c40c212-7dad-11...	PENDING	Transcribe	
Apr 12 2020 06:59PM EDT		testing	PENDING	Transcribe	
Apr 12 2020 06:39PM EDT			READY	Transcribe	
Apr 12 2020 05:46PM EDT			PENDING	Transcribe	

Upload a recording

- Go to "Conference recordings" tab in the Recordings page then click "Upload recording" button.



Recordings

Conference Recordings | Transcript Requests

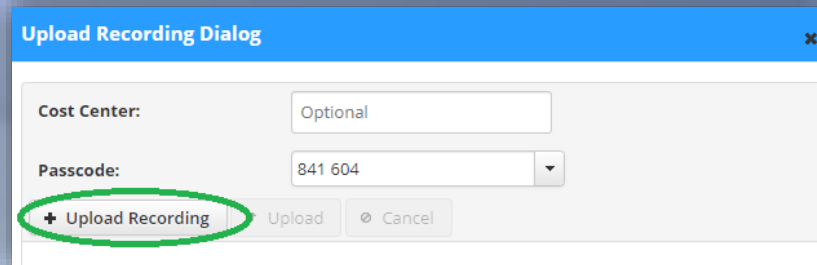
Search: Enter keyword

Dial In Replay Number: (866) 215-1112 (DOMESTIC) | +1 725-223-0887 (INTERNATIONAL)

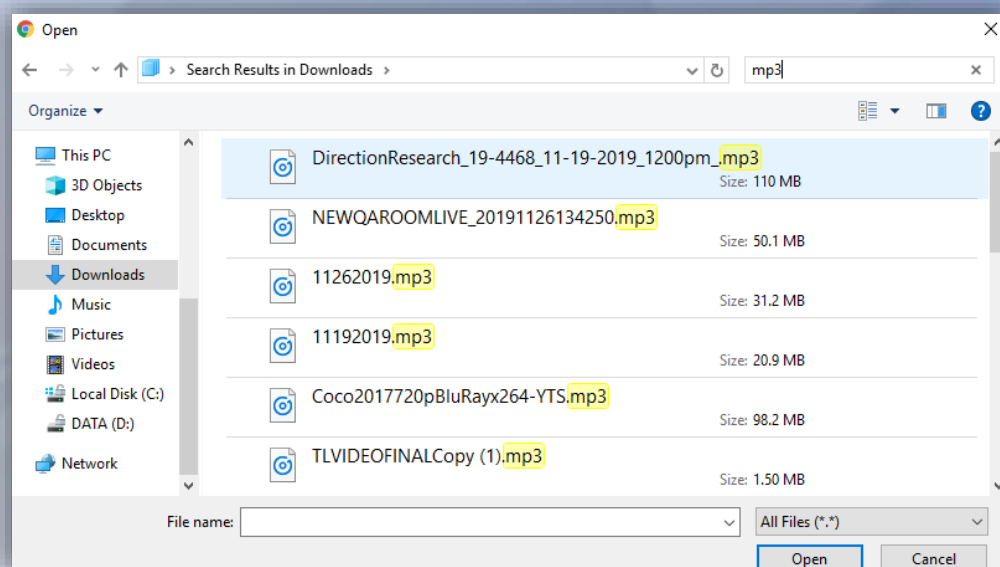
(1 of 1) | 1 | 50

Date & Time	Label	File Name	Phone Number	Cost Center	Passcode	Dial In Playback Code	Duration	Action
Apr 18 2020 02:03AM EDT		5f9bd1d3-813a-11...	(888) 783-6602		841 604	36171	2 min 53 sec	
Apr 18 2020 01:38AM EDT		cae54b05-8136-11...	(888) 783-6602		841 604	26171	1 min 15 sec	

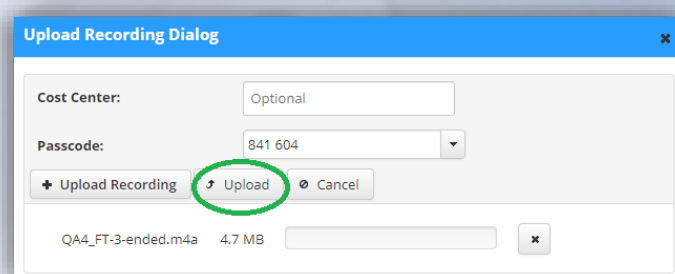
2. Enter cost center and passcode (if any – these 2 fields are optional). Click “Upload recording.”



3. Select the media (either mp3 or mp4 file format) to be uploaded then click “Open.”



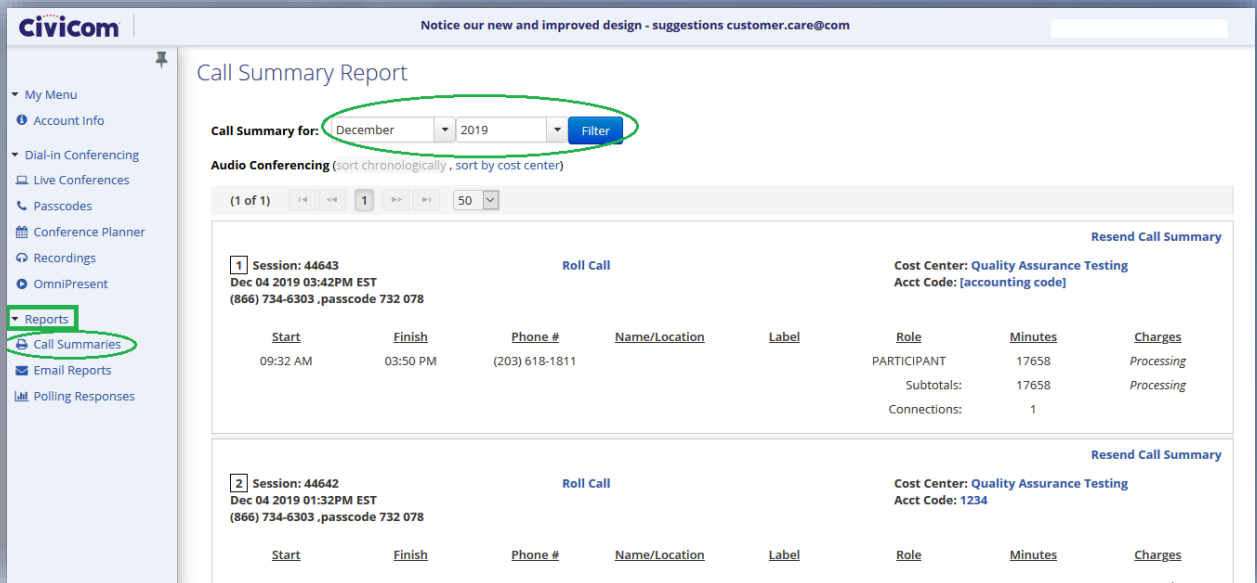
4. Click “Upload” to begin uploading the file.



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.



Notice our new and improved design - suggestions customer.care@com

Call Summary Report

Call Summary for: December 2019 [Filter](#)

Audio Conferencing (sort chronologically, sort by cost center)

(1 of 1) 1 50

Start	Finish	Phone #	Name/Location	Label	Role	Minutes	Charges
09:32 AM	03:50 PM	(203) 618-1811			PARTICIPANT	17658	Processing
						Subtotals:	17658 Processing
						Connections:	1

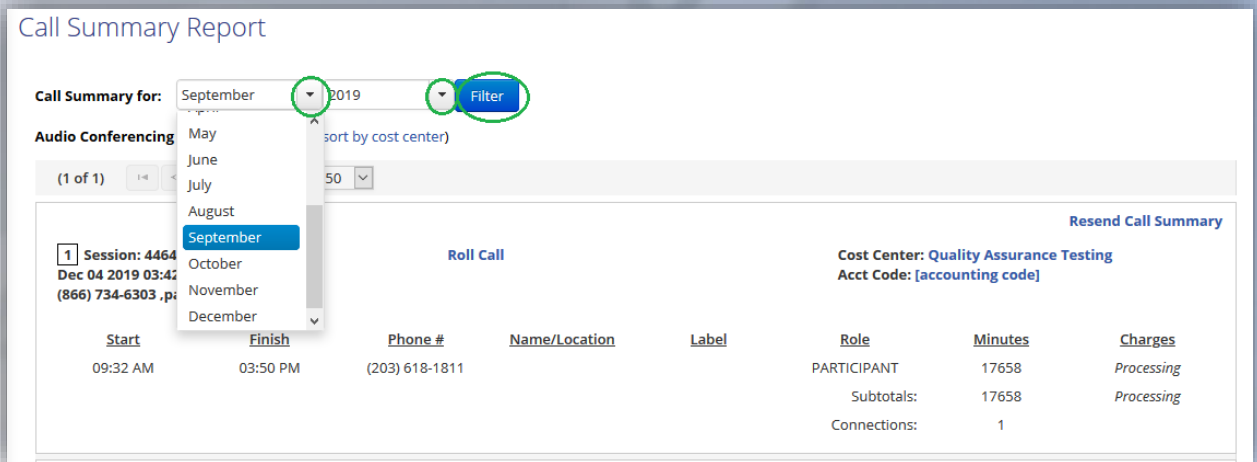
Resend Call Summary

1 Session: 44643
Dec 04 2019 03:42PM EST
(866) 734-6303 ,passcode 732 078

Roll Call

Cost Center: Quality Assurance Testing
Acct Code: [accounting code]

3. To access a previous month and/or year, click drop down button for lists of month and year then click filter button.



Call Summary Report

Call Summary for: September 2019 [Filter](#)

Audio Conferencing (sort by cost center)

(1 of 1) 1 50

Start	Finish	Phone #	Name/Location	Label	Role	Minutes	Charges
09:32 AM	03:50 PM	(203) 618-1811			PARTICIPANT	17658	Processing
						Subtotals:	17658 Processing
						Connections:	1

Resend Call Summary

1 Session: 4464
Dec 04 2019 03:42
(866) 734-6303 ,p

Roll Call

Cost Center: Quality Assurance Testing
Acct Code: [accounting code]

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).

Call Summary Report

Call Summary for: 2019

Audio Conferencing (sort chronologically, sort by cost center)

(1 of 1)

1 Session: 44643 Roll Call Resend Call Summary
 Dec 04 2019 03:42PM EST **Cost Center: Quality Assurance Testing**
 (866) 734-6303 ,passcode 732 078 Acct Code: [accounting code]

Start	Finish	Phone #	Name/Location	Label	Role	Minutes	Charges
09:32 AM	03:50 PM	(203) 618-1811			PARTICIPANT	17658	Processing
Subtotals:						17658	Processing
Connections:						1	

Resend Call Summary

5. The following are details that can be edited:
 - a. Name or location
 - b. Cost center
 - c. Accounting code

Call Summary Report

Call Summary for: 2019

Audio Conferencing (sort chronologically, sort by cost center)

(1 of 1)

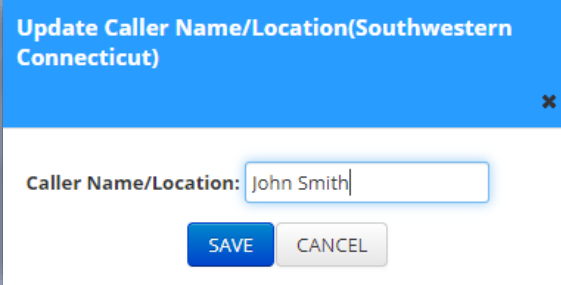
1 Session: 44643 Roll Call Resend Call Summary
 Dec 04 2019 03:42PM EST **Cost Center: Quality Assurance Testing**
 (866) 734-6303 ,passcode 732 078 Acct Code: [accounting code]

Start	Finish	Phone #	Name/Location	Label	Role	Minutes	Charges
09:32 AM	03:50 PM	(203) 618-1811	<input type="text"/>		PARTICIPANT	17658	Processing
Subtotals:						17658	Processing
Connections:						1	

Resend Call Summary

6. Depending on the detail selected to be modified, a window comes up to enter the information.

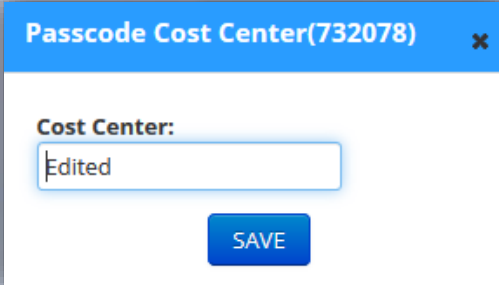
a. Name / Location



Update Caller Name/Location(Southwestern Connecticut) ✕

Caller Name/Location:

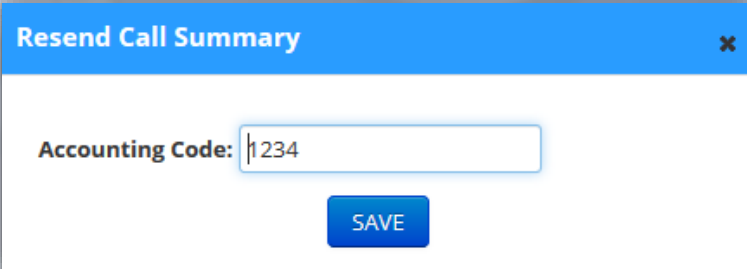
b. Cost center



Passcode Cost Center(732078) ✕

Cost Center:

c. Accounting code



Resend Call Summary ✕

Accounting Code:

Sending call summary

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

Call Summary Report

Call Summary for: 2019

Audio Conferencing (sort chronologically, sort by cost center)

(1 of 1)

1 Session: 44643
Dec 04 2019 03:42PM EST
(866) 734-6303 ,passcode 732 078

Roll Call

Cost Center: Quality Assurance Testing
Acct Code: [accounting code]

Start	Finish	Phone #	Name/Location	Label	Role	Minutes	Charges
09:32 AM	03:50 PM	(203) 618-1811	Noel Awitan		PARTICIPANT	17658	Processing
Subtotals:						17658	Processing
Connections:						1	

[Resend Call Summary](#)

[Resend Call Summary](#)

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.

Resend Call Summary ✕

You may add recipients by seperating their email by any of the following:
Comma (,) Space(' ') or Semicolon (;)

Email:

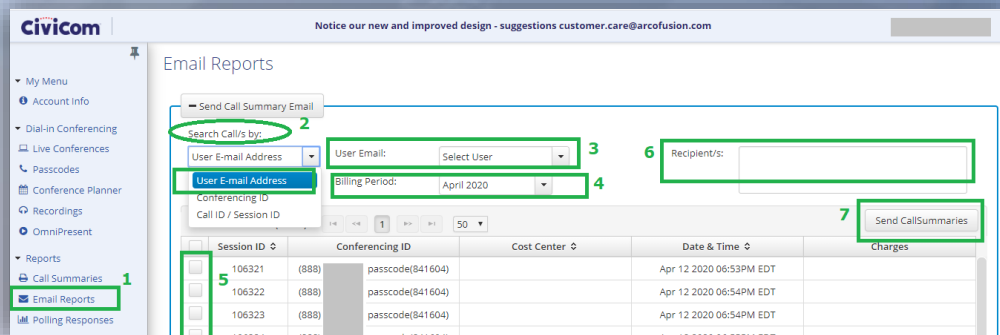
EMAIL REPORTS

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

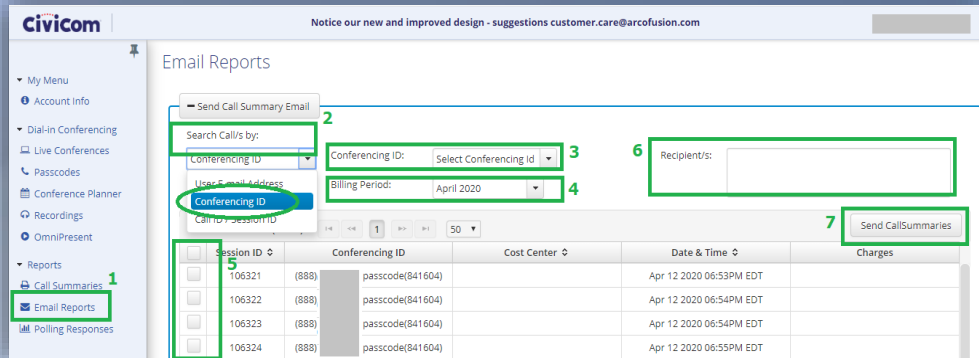


The screenshot shows the Civicom web interface for "Email Reports". The interface includes a sidebar menu on the left with "Email Reports" highlighted (1). The main content area has a "Send Call Summary Email" section with a "Search Call/s by:" dropdown set to "User E-mail Address" (2). Below this, there is a "User Email:" dropdown menu (3) and a "Billing Period:" dropdown menu set to "April 2020" (4). A "Recipient/s:" text input field (6) is also present. A "Send CallSummaries" button (7) is located at the bottom right of the search area. Below the search area is a table with columns: Session ID, Conferencing ID, Cost Center, Date & Time, and Charges. The table contains three rows of data, with the first row selected (5).

Session ID	Conferencing ID	Cost Center	Date & Time	Charges
106321 (888)	passcode(B41604)		Apr 12 2020 06:53PM EDT	
106322 (888)	passcode(B41604)		Apr 12 2020 06:54PM EDT	
106323 (888)	passcode(B41604)		Apr 12 2020 06:54PM EDT	

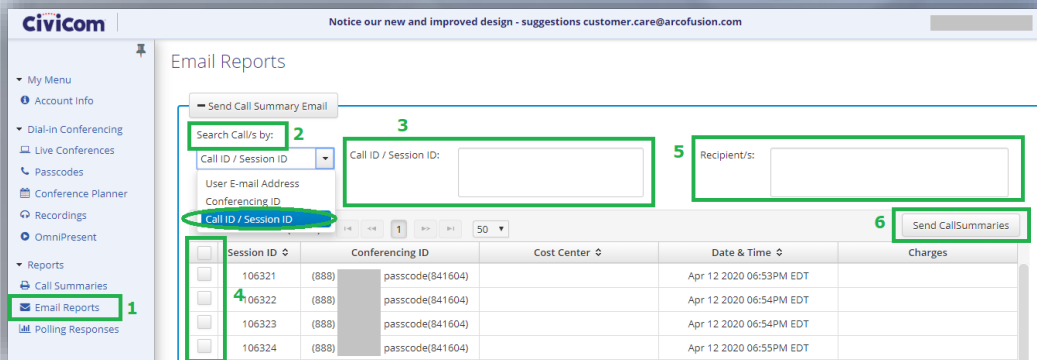
1. Go to email reports page.
2. Under "Search call/s by," select "User email address"
3. Select user email inside the dropdown list.
4. Click drop down box and select the month and year for billing period.
5. Select by placing a checkmark on the conference you wish to get the call summary report.
6.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

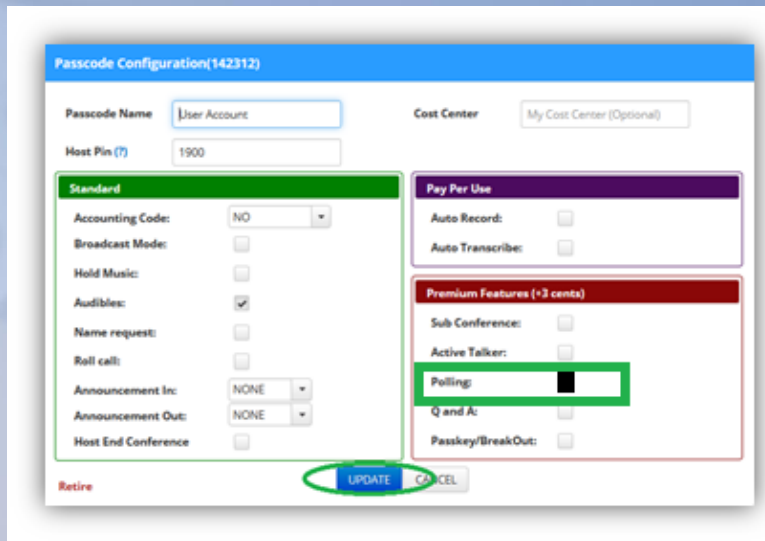


1. Go to email reports page.
2. Under "Search call/s by," select "Call ID / Session ID"
3. Enter the session ID to filter which report is needed.
4. Select by placing a checkmark on the conference you wish to get the call summary report.
5. Enter email address/es of those report recipients.
6. Click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



Passcode Configuration(142312)

Passcode Name: Cost Center:

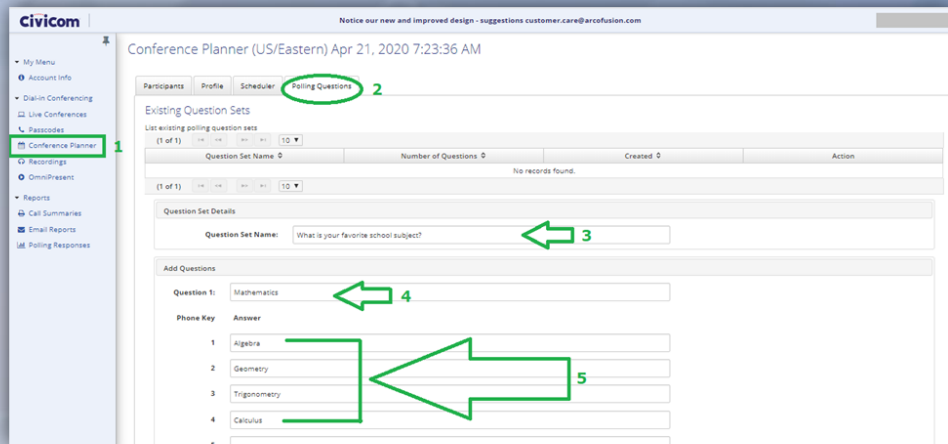
Host Pin (7):

Standard	Pay Per Use
Accounting Code: <input type="text" value="NO"/>	Auto Record: <input type="checkbox"/>
Broadcast Mode: <input type="checkbox"/>	Auto Transcribe: <input type="checkbox"/>
Hold Music: <input type="checkbox"/>	
Audibles: <input checked="" type="checkbox"/>	Premium Features (+2 cents)
Name request: <input type="checkbox"/>	Sub Conference: <input type="checkbox"/>
Roll call: <input type="checkbox"/>	Active Talker: <input type="checkbox"/>
Announcement In: <input type="text" value="NONE"/>	Polling: <input checked="" type="checkbox"/>
Announcement Out: <input type="text" value="NONE"/>	Q and A: <input type="checkbox"/>
Host End Conference: <input type="checkbox"/>	Passkey/BreakOut: <input type="checkbox"/>

Retire

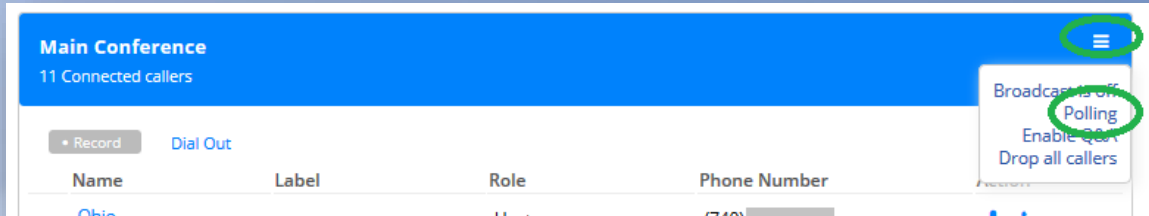
C. To set-up polling questions for your conference:

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.

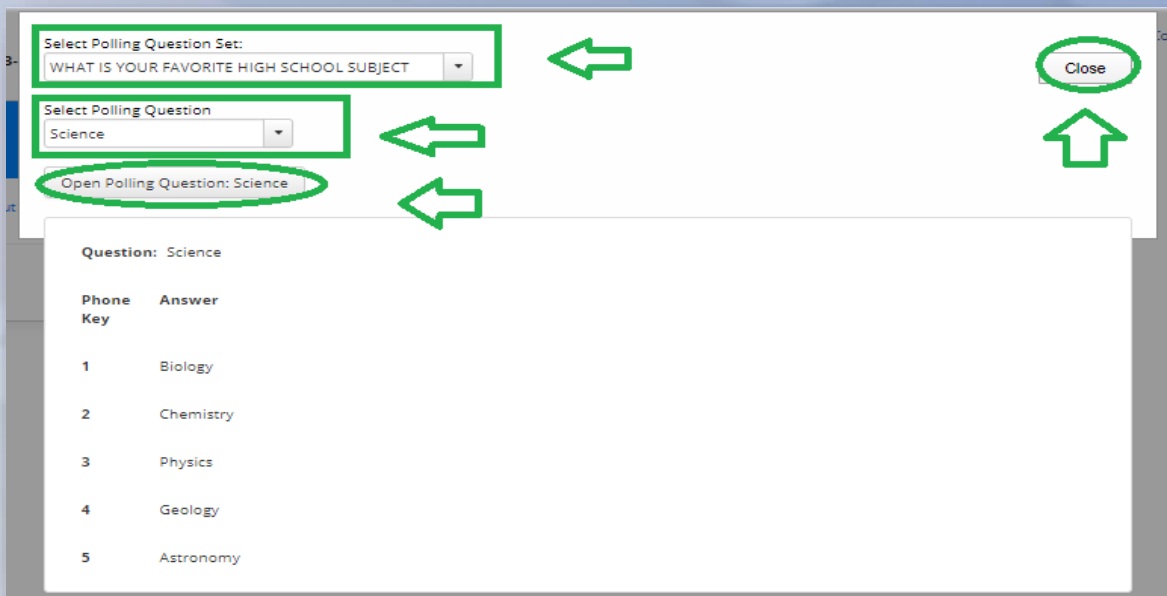


During the conference:

1. Click on the menu icon then select "Polling."



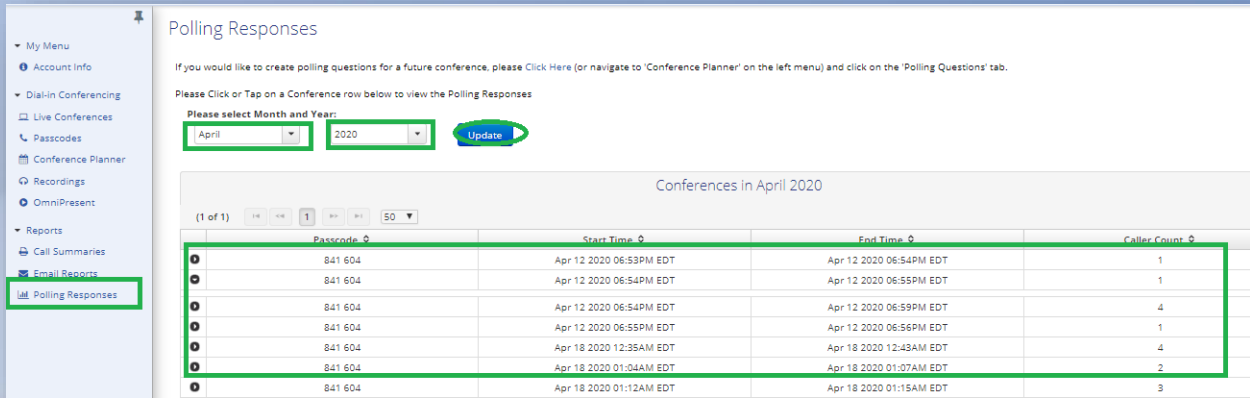
2. A window comes up then select the following:
 - a. Polling question set
 - b. Polling question
3. Click "Open polling question..." button then CLOSE button.



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:



Polling Responses

If you would like to create polling questions for a future conference, please [Click Here](#) (or navigate to 'Conference Planner' on the left menu) and click on the 'Polling Questions' tab.

Please Click or Tap on a Conference row below to view the Polling Responses

Please select Month and Year:

April 2020 [Update](#)

Conferences in April 2020

	Passcode	Start Time	End Time	Caller Count
0	841 604	Apr 12 2020 06:53PM EDT	Apr 12 2020 06:54PM EDT	1
0	841 604	Apr 12 2020 06:54PM EDT	Apr 12 2020 06:55PM EDT	1
0	841 604	Apr 12 2020 06:54PM EDT	Apr 12 2020 06:59PM EDT	4
0	841 604	Apr 12 2020 06:55PM EDT	Apr 12 2020 06:56PM EDT	1
0	841 604	Apr 18 2020 12:35AM EDT	Apr 18 2020 12:43AM EDT	4
0	841 604	Apr 18 2020 01:04AM EDT	Apr 18 2020 01:07AM EDT	2
0	841 604	Apr 18 2020 01:12AM EDT	Apr 18 2020 01:15AM EDT	3

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.