

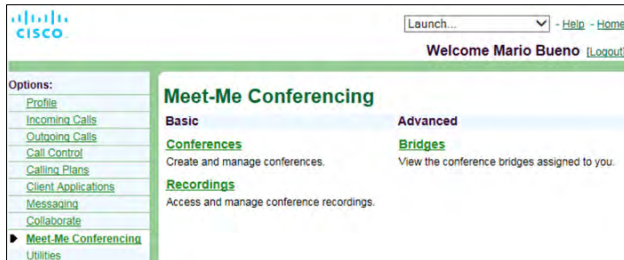
UC Portal Meet-Me Conferencing

Manage Conferences

Access

If you have been assigned to a Meet-Me conference bridge, by your Admin, you will have access to Conferencing features.

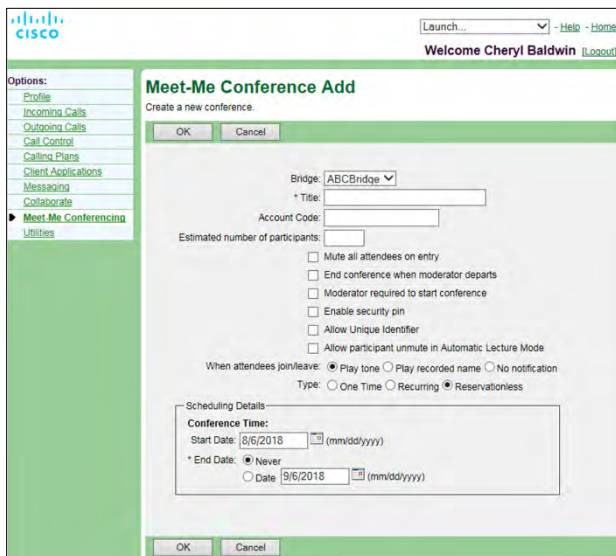
1. Log into your BroadWorks UC Portal account.
2. In the Options list, click **Meet-Me** (or Meet-Me Conferencing). The *User Meet-Me Conferencing* menu page appears.



User – Meet-Me Conferencing Menu Page

Add Conference

Users can create One-Time, Recurring, or Reservationless conferences:



User – Meet-Me Conference Add Page

1. On the Meet-Me Conferences page, click **Add**. The *User - Meet-Me Conference Add page* appears.
2. Select a bridge from the *Bridge* drop-down list (if multiples are offered).
3. Type a descriptive title for the conference.
4. **Account Code**: optional. Enter a code as desired.
5. **Estimated number of participants**: Enter a maximum of 294, but no more than the number of ports on the bridge.
6. **Mute all attendees on entry**: select to mute attendees on entry
7. **End conference when moderator departs**: select to end the conference for all when the moderator leaves.
8. **Moderator required to start conference**: select to specify that the conference cannot start without a moderator.

9. **Enable security pin**: Click to specify that a security PIN is required to join the conference.
10. **Allow Unique Identifier**: Click to require that participants enter a self-identification code to access the conference.
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. **Scheduling Details** - Specify the conference schedule info:
 - 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:
 - **Daily** - Click and enter the frequency in days.
 - **Weekly** - Click and enter the frequency in weeks, and check the day or days of the week to schedule the conference.
 - **Monthly** - Click and specify the frequency in months, and enter the day of the month to schedule the conference.
 - **Yearly** - Click and 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 end date.*
16. Click **OK** to save your conference settings.

Manage Your Conferences

As a User you can view the list of the conferences for which you are a host or delegate, and you may edit or delete the conferences you created.

1. 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**. OR - click **Edit** in the row of the desired item, click *Delete* on the *User - Meet-Me Conference Modify* page.

Modify Conference

Users can modify information for conferences they created in the *User - Meet-Me Conferences* page:

1. Click **Edit** on any conference listed to begin to modify. The *Modify page displays with the Profile tab in focus*.
2. Modify the conference information displayed here, as desired.
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** on 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** when you are finished.

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 recording(s) and click **Apply** or **OK**.





Conferencing Moderator Client

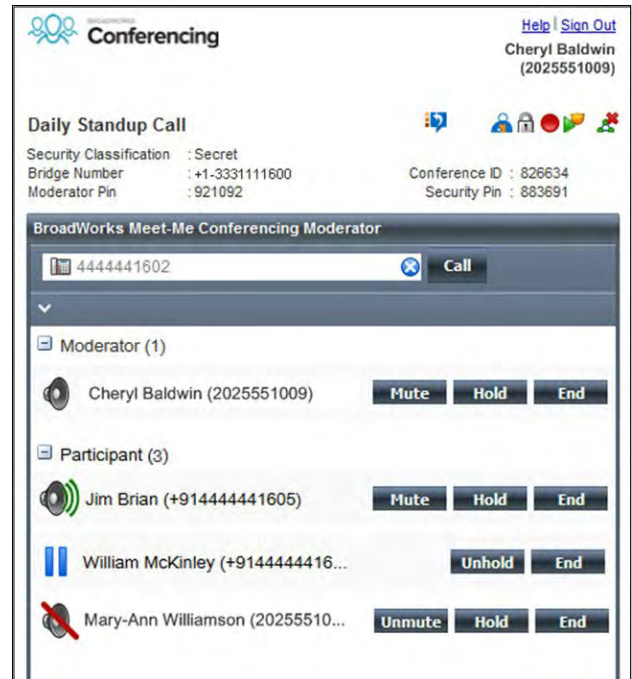
The Conferencing Moderator client allows moderators to manage conferences. You can only moderate one conference at a time; however, a conference can be managed by several moderators.

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 of conference moderators and participants, with their phone number and status: *Active Talker*  *On Hold*  *Muted*  *Unmuted* 
- **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.



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.

1. Either on the web portal or in Outlook, access the conference/meeting to moderate.
2. Click **Launch Moderator Client** on the web portal page or select it from the *Meet-Me Conference* menu in Outlook.
3. To join the conference, click the **Call Me Now Link** and enter your number or call in using your phone.
4. Follow prompts to enter the PINs or Codes.

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.



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


End Conference

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

Play Security Classification Announcement

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

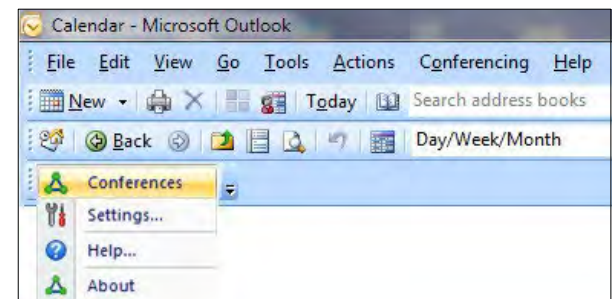
View Message History

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 Outlook Add-in

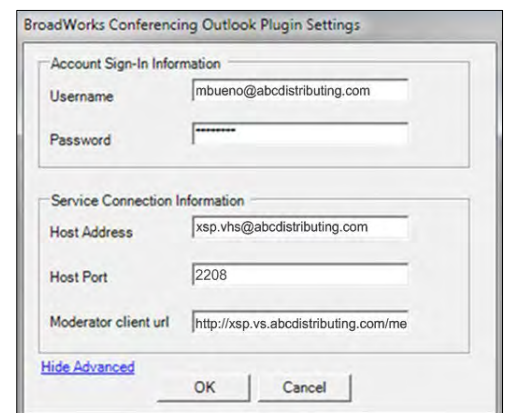


Meet-Me Conferencing Outlook Add-In Toolbar

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 that appears, enter your BroadWorks 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 BroadWorks Open Client Server and the URL of the moderator client.
- Click **OK**.

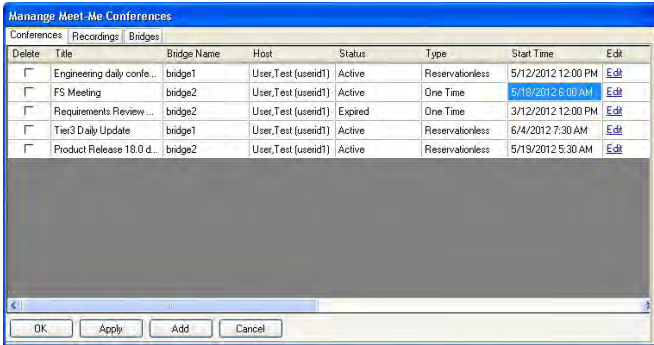


Conferencing Outlook Plug-in Settings

Login Process

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

View Conferences



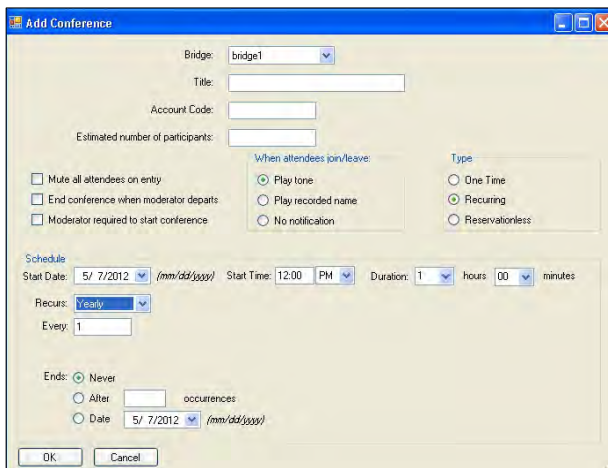
Manage Meet-Me Conferences

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 BroadWorks to be able to create a BroadWorks Meet-Me Conference from Outlook.

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

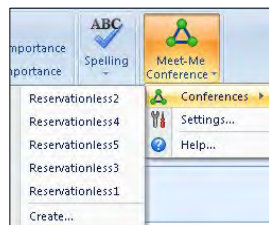


- Enter the required information. For details, see [Add Conference](#) in this Quick Reference Guide.
- Click **OK**. The conference is created on BroadWorks and the meeting invitation is populated with conference information.

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.

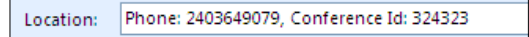


The body of the Outlook meeting invitation is populated with the conference invitation text. There is no interaction with BroadWorks when the meeting invitation is populated. The text includes:

- 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

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

Delegate Conference

- In the *Manage Meet-Me Conferences* dialog box, click **Edit** on the row of the conference. The *Edit Conference* dialog box appears.
- Click the *Delegates* tab.
- Use the search function to find available users.
- 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.
- 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 BroadWorks via the add-in:

- If the meeting is non-recurring or if it is recurring and you delete all occurrences, the BroadWorks conference is deleted.
- If the meeting is recurring and you delete one occurrence or if the conference in Reservationless, the BroadWorks 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 can hear the menu, while other participants continue talking in the conference.

However, you do not hear the conference while listening to the menu. 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

Additional 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 on the conference bridge. This could link to a human operator, an Auto Attendant, or a VoiceXML script that can answer the call to help you.

Want to Learn More?

Here are some options for finding learning resources or getting assistance:

Users:

Review the helpful documentation for all of your voice products at www.GoMomentum.com/MU and contact your supervisor or the organization’s Voice System Admin for help with your access or the answers to questions.

Administrators:

You have guides at www.GoMomentum.com/MU too, or you can use these contact methods:

1. Call or email your Momentum Account Manager
2. Email Customer Care at: support@GoMomentum.com
3. Call Customer Care at: **888.538.3960**

