Global**Conference**

Audio and Web Conferencing Solution

Web Conference User Guide

- **Manage your audio conference online using easy point and click conference commands**
- **Show slide presentations and graphics to meeting participants**
- **Show your desktop to meeting participants**
- **Show applications from your computer to meeting participants**
- **Use features that make your meeting more efficient**
- **Record a conference (audio only or include synchronized visuals)**

WEB CONFERENCE USER GUIDE

GETTING STARTED

SETTING UP A CONFERENCE CALL

1. If this is your first Audio Conference, familiarize yourself with the controls and capabilities of the standard audio conference commands.

2. Inform all participants of the date and time of the conference.

3. Give participants your Audio Conference phone number and 7-digit access code.

4. If you are using Web Conference to present visuals, provide participants with this URL to join the Web Conference: http://autorecord.cfer.com/wholesale

5. When it is time for your conference, dial in on the Audio Conference phone number, enter your 7-digit access code, then listen to the prompts to enter your Chairperson passcode to begin the conference.

6. Login to your Web Conference (see next section). If this is your first time using Web Conference, allow extra time to download and install the Java plug-in.

7. Conference participants dial the Audio Conference number at the designated time, enter the 7-digit access code, and the conference is underway.

8. Participants can view your Web Conference visuals using a standard web browser. (There are no plug-ins required for the participant).

LOGGING INTO THE WEB CONFERENCE

Using a Web browser, go to; http://autorecord.cfer.com/wholesale and select one of the
following; Start Conference, Join Conference or Archives

1. A Java applet will launch the Web Conference. You will be
prompted with a security notice indicating that the application is
verified. Click "Start" to continue.

*If you have not previously installed Java 2 Runtime Environment 1.3
you will receive a message asking if you would like to begin installation
of this plug-in. Click "OK" to start the installation.*
*– Please read any messages that may appear during the installation
process to insure a complete installation.*

  • *When prompted for a File Download, select "Run this program
  from its current location."*
  • *When prompted to install and run the Java 2 Runtime
  Environment click "Yes"*
  • *Follow the instructions provided during installation of the Java
  plug-in.*
  • *If prompted to restart your computer, do so before proceeding.*

2. When the Chairperson Login screen is presented, enter your
Audio Conference phone number, 7-digit access code and
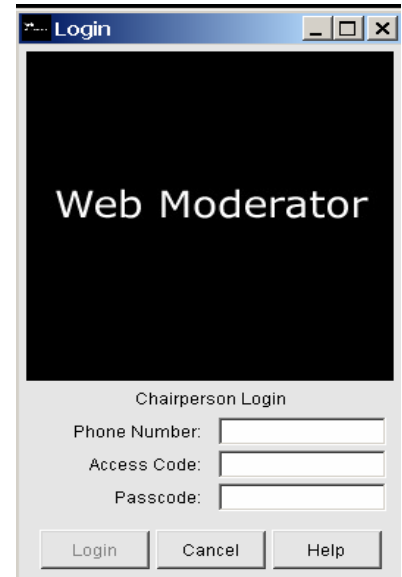Chairperson passcode. Click "Login". (Figure 1)

Figure 1: Chairperson Login Screen

3. Participants who will be joining the Web Conference will go to
http://autorecord.cfer.com/wholesale and select "Join Conference". Participants do not need
to install any plug-ins to join the Web conference. They will be prompted to enter your Audio
Conference phone number and 7-digit access code.

  • After entering the login numbers, the participant will be prompted to enter their name,
  email, phone and company. **Only the name is required**. Upon completion of the
  conference, the Chairperson will receive an email containing all of the participant
  registration information.

4. After you login you will be presented with the Web Conference screens.

5. Participants who login will initially see the Participant Lobby screen if the Web Conference
has not started. (Figure 2) If they login after the Web Conference has started, participants
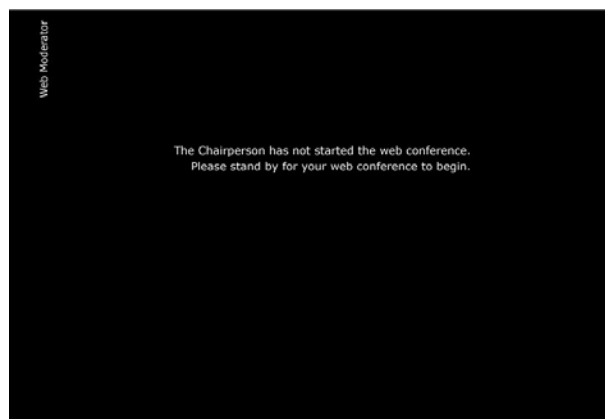will see the slide or desktop screen that the Chairperson is showing to participants.

Figure 2: Participant Lobby Screen

FEATURES

CHAIRPERSON CONFERENCE CONTROL SCREEN

The Conference Control screen is your main console for managing your conference. All the features of the Web Conference service are available through this console. (Figure 3)

On the left side of the screen, the Chairperson can view either the web or audio control buttons. Functions of web and audio controls are below.
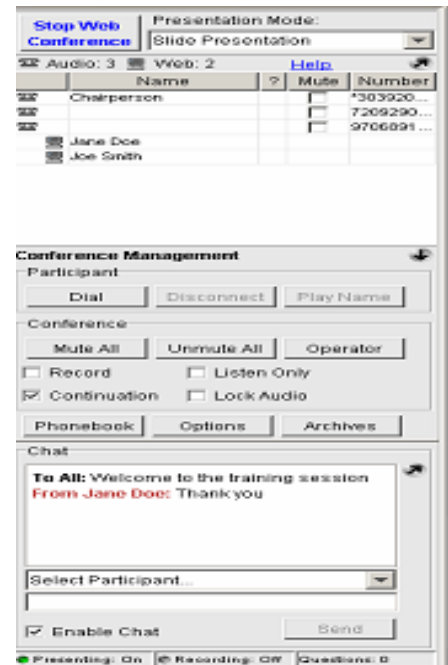

Figure 3: Conference Control Screen

FEATURES: WEB CONTROLS

The "Conference Controls Screen" includes an icon to show whether the participant line is either connected via audio or web, the participant's name, if the participant has a question, if the participant is muted, and what phone number the audio participant dialed from.

The following Web Conference commands are available from the Conference Control tab:

Start Web Conference

The "Start Web Conference" button allows you to start a web conference. The drop down box next to the "Start Web Conference" button will allow you to choose a mode of conference: Slide Presentation, Desktop Presentation, or Application Viewing.   Slide Presentation is the default setting. After starting a web conference, you will be asked if you'd like to assign an optional web conference security passcode (4-9 digits). If you do, check the box on the screen. You may proceed without a passcode by selecting "Start." If you assign a web conference passcode, be sure to inform all participants of the security passcode before you begin the conference.

To end a web conference, simply select the "End Web Conference" button or you can exit the web conference. In either case you will be asked to confirm, to prevent accidentally ending your web conference. If you do confirm, the web conference will end immediately. When a web conference is ended, the system will automatically return participants to the Conferencing web page.

Chat

Chat allows a participant and Chairperson to conduct an online "conversation" during a web conference. As the Chairperson you can "chat" with individual participants or with all participants at the same time. Chat is disabled until the Chairperson starts the web conference. To send a message, the Chairperson would use the drop down box to choose who should receive the message, type the message in the text field and press the "Send" button. A participant can only type to the Chairperson. To send a message, the participant types the message into the message field, and presses the "Send" button. The Chairperson will see the chat box quickly flash yellow when they receive a chat. The highlight will only appear if the Chat conversation has been inactive for 30 seconds.

All chat messages will show up in the chat window and can be read by the Chairperson and participants at any time. Important: The Chat window is cleared when the Chairperson stops the web conference.

Figure 4: Chat Feature

Chat content will be added to the bottom of the Web participant report that the Chairperson receives at the end of a conference.

Chat is disabled when the Chairperson switches to Desktop Presentation mode. The Chairperson can enable chat if they choose and all chat messages for that web conference will still be available. (Figure 4)
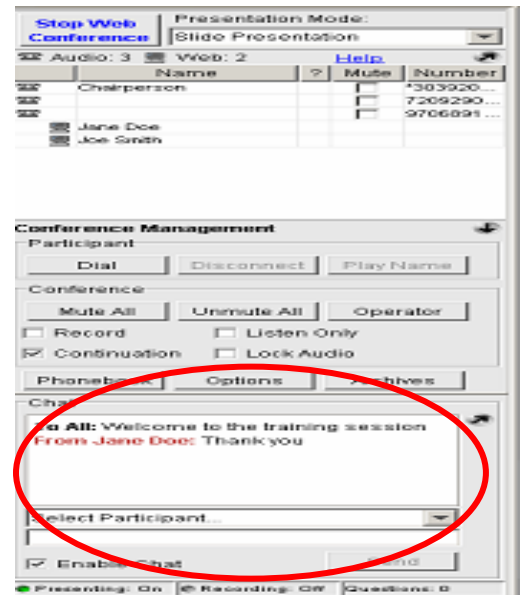
Desktop Presentation

When you select "Desktop Presentation" from the drop down box on the Conference Controls tab (Figure 5), participants will view your entire desktop. Before sharing your desktop, start any of the applications that you wish to share with participants. You should also minimize or close any applications that you do not wish to share. Each application that is open will have a "Shared" button in the upper right hand corner of the application. Clicking this button will toggle the status to "Not Shared". Participants will not be able to see applications that are in a "Not Shared" status.

When you select Desktop Presentation, participants automatically get switched into full screen mode.

When you select Desktop Presentation, participants automatically get switched into full screen mode.

Application Viewing

When you select "Application Viewing" from the drop down box on the Conference Controls tab (Figure 5), participants will view whichever applications you wish to show them. Before choosing Application Viewing, start any of the applications that you wish to share with participants. You should also minimize or close any applications that you do not wish to share. Each application that is open will have a "Shared" button in the upper right hand

corner of the application. Clicking this button will toggle the status to "Not Shared". Participants will not be able to see applications that are in a "Not Shared" status.

When you select Application Viewing, participants automatically get switched into full screen mode.

Slide Presentation

You may show PowerPoint slide sets, GIF (Graphics Interchange Format), JPG (Joint Photographic Experts Group format), and PNG (Portable Network Graphics format) files by choosing "Slide Presentation" on the Conference Controls tab (Figure 5). You can use the following nine functions on the Conference Control screen to manage your presentations.

1. Slide Deck (Thumbnails)

You can store multiple presentation files in your web conference interface. The files will remain there until you delete them. The slide deck displays a thumbnail-sized version of your slides. To present a slide to all participants viewing the web portion of the conference, simply double-click on the desired slide or use the arrow keys at the bottom right hand of the screen. The chosen slide will then be sent to all participants and displayed, at its full resolution, in the conference control window.

The slide deck can be scrolled horizontally to see all the slides contained in your presentations.

2. Insert

This button will add another presentation file or image to the current slides. The new presentation file is inserted directly following the slide that you select (click once to select and it will be highlighted in red). If you want to add the new presentation to the end of the current slide set, select the last thumbnail in the slide set, then select "Insert." You can also use the "Insert" button to simultaneously upload multiple presentations by using the Shift or Control key to select multiple files on your desktop.

3. Delete

This button removes the currently selected thumbnail from the slide set. You can use the Shift or the Control key on your computer to highlight several slides to delete. You may also check the option in the "Delete" popup box that allows you to delete all of the presentation files currently stored in your web conference. If you do this after your meeting is finished, none of your presentation content will be stored on the Conferencing servers. **Note:** You will be asked to confirm the deletion. Additionally, if you delete the current slide being presented, the participants will still see that slide until you have selected another slide.

4. Annotation Tools

These tools allow you to "mark up" slides when in Slide Presentation mode (Figure 6). They are not available in Desktop Presentation or Application Viewing. These annotations on your presentation will be seen by participants. If you are recording your Web Conference, the annotations will be recorded as well. You will be able to select from the following functions:

- Pointer: An arrow, dot or checkmark may be used to point to information in the displayed slide
  - Highlighter: Ability to draw a thick line to highlight an area of the slide
  - Eraser: Select an arrow or highlighted line and remove from the screen.
  - Clear: clears all arrows and highlighted lines from the slide.

Figure 6: Annotation Tools
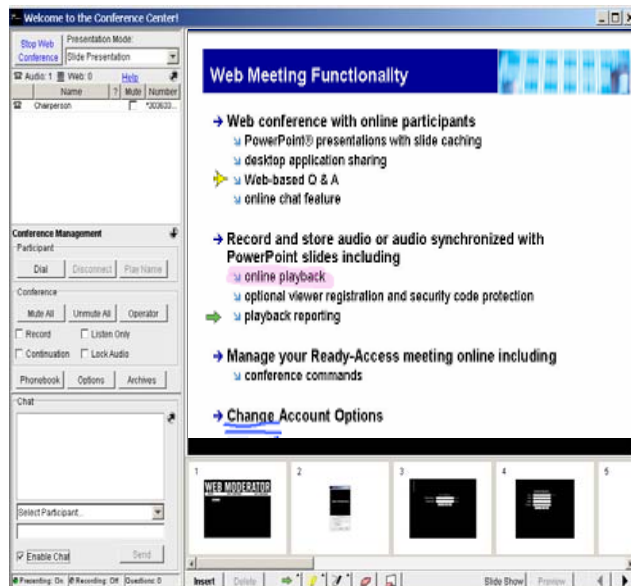
5. Slide Show

You will have the option to go to a full screen mode in Web Meeting to present slides using a projector. This will be useful when giving presentations where some participants are in the conference room with the Chairperson. Participants in the room viewing the projection will not see the Chairpersons Conference Control tab in web conference; they will only see the presentation. Annotation tools, a slide counter, and arrow keys will appear at the bottom of the slide show screen. To go back to the normal Chairperson view, click the "Restore" button on the bottom of the Slide Show screen.

6. Preview

To preview a slide without displaying it to all participants, click once on the slide to highlight it and then select the preview button. When a slide is highlighted and the preview button is selected, the slide will be displayed in a pop-up window, at the maximum slide size. Only you will see the preview. Use the arrow the arrow keys on the Preview Pane to horizontally scroll through the slide deck.

7. Arrow Keys

To present a slide to all participants viewing the web conference, double click on the desired slide. A web conference must be started to present a slide to all participants. The slide will

be displayed at its full resolution in the slide window on the right side of the Conference Control screen. The slide window always displays the content being presented to participants. The arrow buttons on the bottom of the Conference Control screen allow you to move forward and backward to display slides in the presentation. You can also use the scroll bar next to the thumbnail slide deck to locate a particular slide, and then double click on it to display it in the slide window.

9. Helpful Tips

- Do not upload extremely large files. The total file size limit is currently 27MB

- Large PowerPoint and image files will take longer to upload

FEATURES: AUDIO CONFERENCE RECORD

To start a recording in Web Conference, check the box next to "Record" on the Conference Control screen. You will be asked to enter a name for the recording. This name will be used to identify the recording in the Archive Management system. When the recording starts, a message will play into the audio conference that notifies participants the meeting is being recorded. The recorder will show up in the participant list. Fees apply and a new, recorded file is created each time you select the Record button to initiate a recording. To avoid multiple recording fees and files for a single meeting, do not start and stop the recording multiple times during the conference.

Checking the "Record" box starts a recording of the conference call. A screen will appear asking you to enter a name for the recording and confirm the recording. To stop the recording, uncheck the "Record" box. You will be prompted to confirm that you want to stop the recording.

Anytime an audio conference is recorded in conjunction with a web conference, the visuals (Slide Presentation, Desktop Presentation, and Application Viewing) are automatically synchronized.

FEATURES: ACCESSING ARCHIVE MANAGEMENT

To login directly to Conferencing Archive Management:

1. Go to the Conferencing Web site at http://autorecord.cfer.com/csac

2. Select "Archive Management"

At the Archive Management login screen, enter your Conferencing phone number, 7-digit access code and Chairperson passcode.

ARCHIVE MANAGEMENT TOOLS

Previously recorded conferences will be stored in the Archives List for future use (Figure 7). This list includes the title of each archive, the date and time it was recorded and a file ID number. In addition there are some report settings that you can turn on or off. These include:

Registration	By default, this feature setting is ON for a new recording. When Registration is ON, a viewer is asked to enter their name, company name, phone number and email address when they access the recording for online playback. The system requests this information but does not require it for playback access. You can change this feature setting for a specific recording as often as you like, just click on the checkbox (checkmark = ON; blank = OFF).
Notification	By default, this feature is OFF for a new recording. To be notified via email each time a recorded file is played back by a viewer, check the "Notification" box for that recording. (You will need to have a current email address on file.) You can change this feature setting for a specific recording as often as you like, just click on the checkbox (checkmark = ON; blank = OFF).

Once you have selected an archived conference, you are able to use the buttons on the right side of the screen to Email, Play, Download, Name/Rename, assign additional Security to the archive, look at a real-time Report, Delete, access a Help file, or Log out.

Email	To send recipients an email message along with a link to the selected archive for playback, select "Email." Once the message is received the recipient clicks on the link and can play the recording in its entirety.
Play	Select "Play" to playback the conference. Using play, pause, stop, and volume control buttons you can control the recording playback. If your recording contains visuals, you can skip ahead to a specific mode (slide presentation, desktop presentation, or application viewing) of the playback.
Download	Download the file to your PC and store it yourself. You can choose to download either the audio only, or the audio and visuals. Audio only downloads are in MP3 format. Visual downloads are in Flash file format (.swf). If you download a recorded file it will contain all the audio, Slide Presentation, Desktop Presentation, and Application Viewing. You can then delete the file from the system to eliminate hosting and playback charges.
Name/Rename	To change a name of the recorded file select "Rename" and enter a new name for the recording.
	Note: This button is only available if you log directly into Archive Management. To change a name of a file if you accessed Archive Management through the Conference Controls tab in Web Conference, select the title in the "Name" column and enter the new title.
Security	By default, there is no security code assigned to a new

recording. To assign one, select "Security" and enter any number between 4 and 9 digits long. (This button is only available if you log directly into Archive Management. To add security if you accessed Archive Management through the Conference Controls tab from Web Conference, just select the box in the "Security" column and enter the security code.) Viewers will need to enter the current security code to access the recording for playback. You can change the security code for a specific recording as often as you like.

Note: If you use the email button to distribute the recording link and you have entered a security code for the file, the code will automatically appear in the email along with the recording link. You can edit this email. If you do not want to send the code in the same email as the link, you may delete it.

Report	To view a real-time report showing playback activity for a recording, select the "Report" button. The report header includes basic information about the recording such as date created, name, file duration and total playbacks to date. A line item is listed for each time the file was accessed, showing the date and time it was viewed. If viewer registration information was collected (name, company name, phone number and email address) then it is also displayed. This report can be saved to your desktop by selecting the "Save" button in upper right corner. The report shows real-time activity.
Delete	To delete the selected archive recording, select "Delete." The recording will be permanently deleted from the system. You will be asked to confirm the deletion.
Help	Provides general help information on the Archive Management system.
Logout	Select "Logout" to exit Archive Management. You will be returned to the Archive Management login screen.

Figure 7: Archive Management Screen

FEATURES: AUDIO CONTROLS / PARTICIPANT MANAGEMENT

Web Conference includes integrated, online Audio Conference control. This provides all the tools you need to maintain security, add participants, mute lines and manage a successful meeting.

To access the functionality, use the Conference Controls tab on the left hand side of the Web Conference screen. You can use the following features to control your conference and manage participants on your conference:

Dial Participant
Dials out to new participants during the conference. As the Chairperson, you will be taken out of conference and can privately talk with the dialed participant. To have them join the conference, select "Connect" or to return to the conference without the participant select "Disconnect."

Mute/Unmute Participant
Mutes/UnMutes the selected participant.

Mute/Unmute All
Mutes/UnMutes all participants that are currently in the call with the exception of the Chairperson. Participants can unmute their own line by pressing *7 on their phone at any time.

Play Name
Plays the selected participant's name if Name Record has been enabled on your audio subscription. This is an easy way to identify the participant on each line so you can type in the participant's name. If Name Record has not been enabled you will hear "an anonymous participant.

Disconnect
Disconnects the selected participant from the conference. This can be done for either an audio line or a web participant line that shows in the Conference Controls tab.

Lock
Checking this box locks the conference. No additional participants will be able to join the conference. When the box is not checked, the conference is unlocked. You will need to unlock the conference if you want additional participants (or an operator) to join.

Continuation
When checked, it allows the conference to continue after the Chairperson hangs up. The conference will continue until the last participant disconnects.

Listen Only
When this box is checked, it automatically mutes all of the lines in conference except for the Chairperson's line, or the Recording line. New participants will be muted on their phones as they enter the conference. Participants cannot unmute their own line.

Phonebook
Keeps a record of contact information. See the Phonebook section below for more information.

Options
Allows the Chairperson to change Account Options for the current conference call or future conference calls. See the Options section below for more information.

Operator
Allows the Chairperson to access a Conferencing operator.

FEATURES: PHONEBOOK

The Chairperson has the ability to create a personalized phonebook. Select "Phonebook" from the Conference Controls tab. You can add a new contact, edit and delete existing contacts, and dial a single participant or simultaneously dial out to a 20 participant list.

New
Adds a new entry to the phonebook. Enter the First Name, Last Name, Company, Office Phone, Home Phone, Mobile, Other and Email. Click "Save" to add the new entry. **Note:** the phonebook will accept international numbers but they must have the 011 prefix (do not include for U.S. and Caribbean numbers) and should not include other international dialing code prefixes.

Edit
Highlight the contact whose information you want to edit and select the "Edit" command.

Delete
Highlight the contact whose information you want to delete and select the "Delete" command.

Add
Highlight the contact you want to add to the Dial Participant list. You can highlight up to 20 participants and then select "Add" to simultaneously add them all to the list.

Remove
Highlight the contact you want to delete from the Dial Participant list and select the "Delete" command.

Dial
Dials out to the selected participant.

Dial All
Dials out simultaneously to all of the participants included in the Dial Participant list.

FEATURES: ACCOUNT OPTIONS

The Chairperson can change their Account Options by selecting "Options" from the Conference Controls tab (Figure 8). You have the option of changing features for the current call or for future calls. The Chairperson can change these settings as often as they like.

Name Record
Turn on/off Name Record. When checked, Name Record is on. Participants will hear a voice prompt that asks them to state their name followed by the # key, before they are placed into conference. The system records the participant's response.

Entry Announcement
Select Tones, Silence, or Name Announce. If tones are selected, a tone will sound each time a participant joins or leaves the conference. Name Announce will play each participant's recorded name followed by "joined" or "left".

Quick Start
Turn on/off Quick Start. When checked, Quick Start is turned on. (This feature is not enabled for all Chairpersons).

Auto Continuation
Turn on/off Auto-Continuation. When checked, Auto-Continuation is turned on. (This feature is not enabled for all Chairpersons). When Quick Start is on, Auto-Continuation is automatically on also.

Standard Color/True Color
Chairpersons have a choice of how their bandwidth is distributed when using the Application Viewing feature:
  ▪ Standard Color - Transmits application viewing data at a faster rate using 256 colors (default setting).
  ▪ True Color - Choose when best image quality & color is required. Participants should have DSL or higher internet connection

Figure 8: Account Options
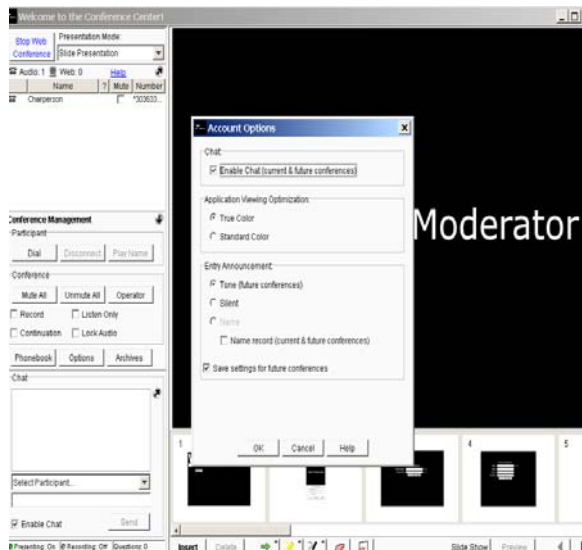
FEATURES: HELP

A "Help" button is available on select screens. The Help hyperlink provides a file of general help information.

INSTALLING THE JAVA PLUG-IN

If you do not already have the Java plug-in installed, the Web Conference service will automatically install it for you the first time that use Web Conference. If you encounter problems with this one-time installation please contact the Audio Conference Help Desk for assistance.

SYSTEM REQUIREMENTS

> Chairperson PC requires:

- Windows 98, 2000, NT, XP, Mac OS X 10.2, Linux
- Internet Explorer 5.0 or greater, Netscape Navigator 4.7, Netscape 6.2 or 7.0, Mozilla 1.1 and higher
- JAVA 1.3.1_03 - 1.3.1_08, 1.4.1 (Chairperson will be prompted to download 1.3.1_07 the first time the service is accessed.) If the Chairperson is using Netscape 6.2, they will need to download JAVA 1.4.2
- Internet connection (best performance is DSL and above)

> Participant PC requires:

- Windows 98, 2000, NT, XP, Mac OS X 10.2, Linux
- Internet Explorer 5.0 or greater, Netscape Navigator 4.0 or greater, Mozilla 1.1 and higher • No downloads or special programs are required for participants to view presentations
- Internet connection (dial up will work, but slower on slide updates)

> Recording playback requirements:

- Multimedia PC with speakers
- Internet connection
- Flash Player Download