

UC for Business Executive Conference



Revision History

Document No.	Release Date	Change Description
009NEC-00QRGR	04/13/11	Initial release.

Table of Contents

Introduction.....	1
The Conferencing Interface.....	1
Conferencing Icons	2
Create a Conference	4
Convert an Existing Call to a Conference	4
Create an Instant Conference	4
Create a Scheduled or Recurring Conference	5
Send a Notification to Scheduled Conference Participants.....	5
Edit a Scheduled Conference	5
Reactivate a Historical Conference	6
Manage a Conference	6
Summary of Management Functions	6
Control Participants in a Conference	7
Activities	9
Add Conference Participants	9
Add a Conference Room.....	9
Invite Users to a Running Conference	10
Send a Reminder.....	10
Introduce a Party.....	10
Adjust the Volume of the Conference	10
Adjust the Microphone Input Level	11
Regions	11
Remove a Participant from a Conference	11
Leave a Conference	12
End a Conference Call	12
Record a Conference	12
Manually Record a Conference.....	12
Access the Recordings	13
Play a Recording	13
Download a Recording.....	13

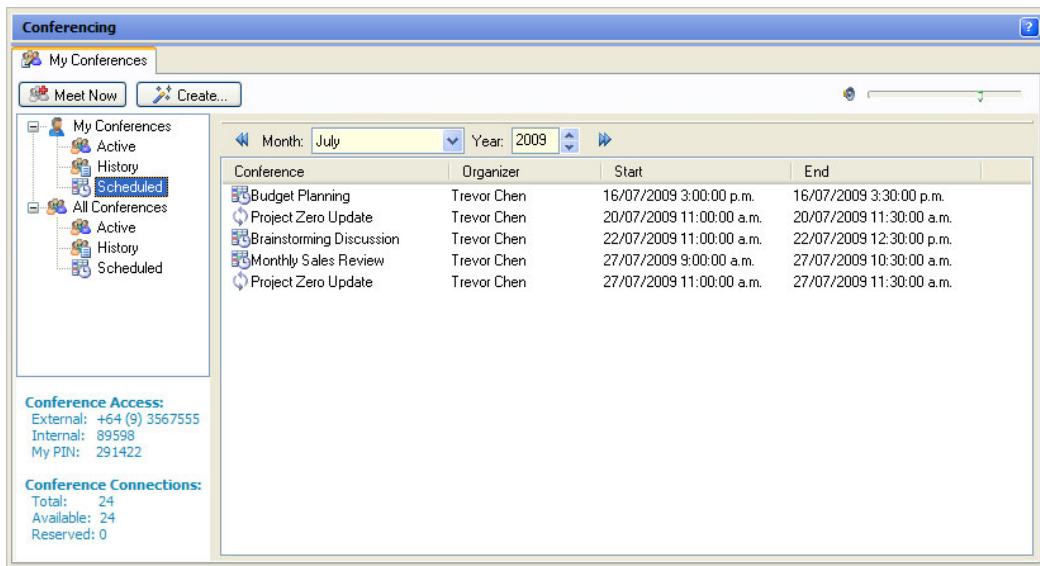
Introduction

The Executive Conference module enables users to schedule and control audio-conferences for up to 64 internal and external parties, via Desktop, Console, or Executive Insight. This guide provides step-by-step instructions on how to use the Executive Conference module.

The Conferencing Interface

The Conferencing window is the entry point into Executive Conference and is used to:

- Create an immediate, scheduled, or recurring conference using the Conference Setup Wizard.
- View a list of active, historical, and scheduled conferences.
- Reactivate a historical conference.
- Attend a conference to which you are invited.



The Conferencing window displays a list of all scheduled or attended conferences and listings for all other Executive Conference users (if authorized). Double-clicking a conference in the:


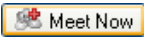
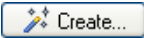


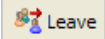
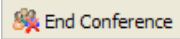
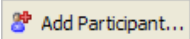
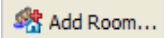
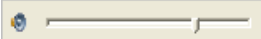

- **Active** or **History** folder opens the **Conference Information** tab to view and control a running conference or reactivate a historical conference.
- **Scheduled** folder opens the conference for editing.

















The following table describes the Conferencing window's sections, system-specific information, and columns.

Item	Description
Active	Displays a list of all the conferences that are in progress or you are attending.
History	Lists all the completed scheduled/attended conferences.
Scheduled	Lists all the future scheduled/invitations to conferences.
External	The external dial-in number for Executive Conference.
Internal	Lists the internal extension number that is used to dial into Executive Conference.
My PIN	Lists the Executive Conference PIN number as configured in Administrator.

Item	Description
Conference Connections	Indicates the connections for: <ul style="list-style-type: none"> • Total • Available • Reserved
Conference	The name or subject of the conference call.
Organizer	The person who organized the conference.
Start	The scheduled start date and time of the conference. If the conference is an active or historical conference, this field displays the actual start time of the conference.
End	The scheduled end time of the conference. If the conference is a historical conference, this field displays the actual end time of the conference. <p>Note: The Scheduled conferences list also provides the option to filter the list of conferences based on the month and year that the conference is scheduled to occur.</p>

Conferencing Icons

Icon	Name	Description
	Convert to Conference	Converts a call to a conference.
	Meet Now	Instantly creates a conference using the default system settings.
	Create	Adds a new conference using the wizard.
	History	Displays a list of previous conferences.
	Reactivate	Reactivates a selected inactive conference. <p>Note: This icon is only visible when a selected conference is not active.</p>
	Leave	Hangs up and exits from a running conference while leaving the conference active.
	End Conference	Exits and ends a current conference. All participants are disconnected from the conference.
	Add Participant	Adds new participants to the active conference using the wizard.
	Add Room	Adds a new conference room to the active conference using the wizard.
	Volume slider	Adjusts the overall conference volume played via the handset. The personal setting does not affect the conference volume for other parties.
	Show/Hide Conference Regions	Toggles between splitting the Conference window into separate regions based on the origin of the call, or displaying all calls in a single window.

Icon	Name	Description
	Close	Closes the currently active window or application. Note: If still connected to the conference, a message alert prompts to confirm hanging up from the conference. Clicking: <ul style="list-style-type: none"> Yes hangs up from the conference and closes the Conference Information tab. No closes the Conference Information tab, but leaves a connection to the conference.
Participant Button Icons		
	Conference Host	Indicates the conference host.
	Conference Participant	Indicates a conference participant.
	Participant Presence	The participant presence indicator.
	Conference Room Online	The conference room is online.
	Unmuted Line	The line is unmuted.
	Muted Line	The line is muted.
	Participant Microphone Volume Control	The participant's microphone volume control.
	Participant	When grayed-out, the invitee is not currently connected to the conference.
Recording Icons		
	Record	Manually records a conference.
	Pause	Pauses the recording. To resume recording, click the icon again.
	Stop	Stops the recording. The recording automatically saves to the database.
	Unrecorded	Indicates an unrecorded section.
	Recorded	Indicates a recorded section.
	Recorded Internal Region	Indicates a recorded internal region.
	Recorded External Region	Indicates a recorded external region.

Create a Conference

Convert an Existing Call to a Conference

1. While on a call, right-click the call in the Active Calls window.
2. Click the **Convert to Conference** icon to convert the call to a conference.

Create an Instant Conference

An Instant Conference is a one-time conference with an immediate start time and a predefined duration. When an Instant Conference is scheduled, the conference is immediately made active and the scheduler is automatically connected to the conference.

This section describes how to create an instant conference using either default system or customized settings, or via a touch-tone phone.

Create an Instant Conference Using the Default Settings

- Click the **Meet Now** icon to instantly create a conference using the default system settings.

The system creates the conference, and the line automatically connects to the conference. Conference details display on the bottom right-hand corner of the window. Add participants as required.

Create an Instant Conference Using the Customized Settings

1. Click the **Create** icon to start the Add New Conference wizard.
2. In the **Name** field, type the conference name and then click **Next**.
3. Click the **Instant Conference** option.
4. Type a six-digit PIN number for the conference.



Note: The PIN that is entered is used to define the conference in the database and must be unique. If the PIN is not accepted, enter a new PIN number or click the **Regenerate PIN** icon to automatically generate a valid PIN.

5. Click/clear the appropriate options to configure the conference recording options, and then click **Next**.
6. Add new Participants, Conference Rooms, or reserve connections for possible Unspecified Participants.
7. Optional: Select to send an Email Notification with conference details to participants.
8. Verify that the conference has been configured correctly, and then click **Finish** to create the conference and automatically connect the phone line to this conference.

Create an Instant Conference Via a Touch-Tone Phone

1. Dial the **Conference Bridge** access number.



Note: The Conference Bridge access number displays on the bottom left hand corner of the **My Conferences** tab.

2. When prompted by the auto attendant, press the phone's star (*) key.
3. Dial the extension number.
4. Dial the mailbox password.

The system creates a conference and the phone line automatically connects to the conference.

Create a Scheduled or Recurring Conference

1. Click the **Create** icon to start the Add New Conference wizard.
2. In the **Name** field, type the conference name and then click **Next**.
3. Enter the required dates and times for the selected conference type, and then click **Next**.
 - **Scheduled Conference** = Creates a one-off future conference.
 - a. In the **Start Time** field, enter the conference's commencement date and time.
 - b. In the **End Time** field, enter the conference's end date and end time.
 - **Recurring Conference** = Creates a recurring series of future conferences.
 - a. In the **Start Time** field, enter the conference's commencement time.
 - b. In the **End Time** field, enter the conference's end time.
 - c. In the **Effective From** = Enter the date that the first occurrence of the recurring conference.
 - d. In the **Effective To** = Enter the date that the final occurrence of the recurring conference.
 - e. Select the required period of recurrence and click Next.
4. Specify the **Reserve Time** period (between 2-10 minutes). The resources assigned to the conference are reserved by the system during this period and participants can call in. If no callers dial into the conference by the end of the reserve time, the conference automatically terminates to free resources.
5. Type or regenerate a six-digit conference security PIN to enter when dialing into the conference from an external number.
6. Click/clear the appropriate options to configure the conference recording options, and then click **Next**.
7. Add new Participants, Conference Rooms, or reserve connections for possible Unspecified Participants.
8. Optional: Choose to automatically send a conference notification email to the participants.
9. Verify that the conference has been configured correctly, and then click **Finish** to create the conference.

Send a Notification to Scheduled Conference Participants

Participants in scheduled conferences can be notified of conferences via email.

1. Ensure that the email application is running.
2. Under the **Scheduled** folder, right-click the conference to send an email notification to and then select **Send Email Notification**.
3. An email to notify all participants of the scheduled conference automatically generates. Edit the notification email, and then click **Send**.

Edit a Scheduled Conference

A scheduled conference can be modified and participants notified of the changes.

1. Right-click the conference to be modified, and then select **Edit**.



Note: If the conference is a recurring conference, a window prompts to specify whether the selected occurrence of the conference or the entire conference series is to be edited.

2. Make the necessary changes in the tabbed window of the Conference Modification window.
 - **Details** tab = Configure the conference name, PIN, times, and recurrence pattern.
 - **Participants** tab = Add/remove Participants and Conference rooms can be using a wizard.
 - **Scheduling** folder = The conference organizer can view the availability of conference participants (as per their Outlook Calendar) and also add/remove participants using a wizard.

Reactivate a Historical Conference

1. Click the **History** icon to display a list of previous conferences.
2. Double-click a conference to review the conference details.
3. Click the **Reactivate** icon to activate the conference.
4. The system automatically connects to the conference. All of the original invitees that are logged into Desktop or Executive Insight receive an alert notification advising that the conference has started.

Manage a Conference

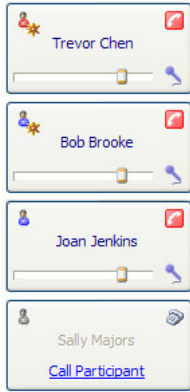
When a conference is running, the organizer or host can control the overall conference as well as individual participants. Individual participants can also manage their own participation as well as limited functions for other participants.

Summary of Management Functions

Host	Participant
Leave	Leave
End Conference	-
Add Room	Add Room
Adjust Conference Volume	Adjust Conference Volume
Show/Hide Regions	Show/Hide Regions
Close	Close
Add Participant	Add Participant
Send Reminder	Send Reminder
Introduce	Introduce
Remove	-
Set as Host	-
Properties	Properties
Disconnect	-
Send Reminder	-
Mute On/Off	Mute On/Off
Adjust Participant Volume	Adjust Participant Volume

Control Participants in a Conference

The **Conferences** tab contains a participant button for each invited participant or conference room.



If an uninvited participant dials into the conference, a participant button is added for that user. The participant buttons provide a means to control user access and conference participation settings. Via a user's participant button, the:

- Conference host can control all parties.
- Participant can control their own state and line status.

Hovering the mouse over a user's participant button displays Presence and telephone status information for that user.

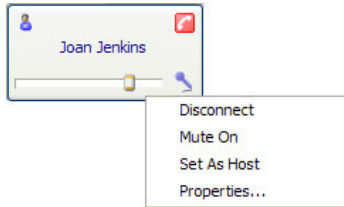
Participant Button Functions

Right-click a participant button to view each option.

Your Participant Button Functions

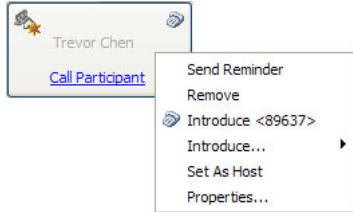
Function	Description
Leave	Allows you to leave the currently-active conference. If you are the conference host, an alert message displays prompting whether to end the entire conference or hang up and leave the conference running.
Isolate Participant	Temporarily excludes the participant from the conference. You can also drag the participant button to the Isolate Participants bar at the bottom of the window.
Mute On	Mute the phone line from other participants in the conference.
Properties	View participant properties, and optionally adjust the properties as required.
Adjust Microphone Volume	Adjust the microphone volume of the phone handset by dragging the slider control. To mute the microphone completely, click the Microphone icon next to the slider to toggle the microphone mute control.

Active Participant Button Functions



Function	Description
Disconnect (host only)	Allows the host to disconnect the participant from the conference. This option is typically used to remove unwanted parties, or in instances where a phone line is injecting unwanted noise into the conference.
Mute On	Mute the participant's phone line. This is most useful when a participant places their phone on hold, thus injecting hold music into the running conference.
Set as Host	Makes the selected participant the conference host.
Properties	View participant properties, and optionally adjust the properties as required.
Adjust Microphone Volume	Adjust the microphone volume of the participant's phone handset by dragging the slider control. To mute the microphone completely, click the Microphone icon next to the slider. This function is typically used to increase the volume of a participant that is difficult to hear, or to mute a participant that is injecting hold music or other noise into the conference.

Inactive Participant Button Functions



Function	Description
Remove (host only)	Removes the participant button from the Conferences tab.
Send Reminder (host only)	Allows the meeting host to send an alert message to the participant reminding them that the conference is in session. Note: This function is only available if the user is logged into Desktop, Console, or Executive Insight.
Introduce Participant	Performs a private, outgoing call to a participant that is yet to join the conference call. This function allows the participant to be briefed prior to entering the conference room. When the call connects, the user's participant button changes to display a: <ul style="list-style-type: none"> • Check Box that connects both parties into the conference room when clicked. • Cross that disconnects the other party and return you to the conference when clicked.
Introduce	Displays a submenu listing the phone numbers associated with that contact, and then an Enter Number field to enter a free-form number. This function is particularly useful when adding remote participants who may not be using their regular phone numbers (e.g., including a participant at a client site or on leave).
Set as Host (host only)	Makes this participant the conference host.
Properties	View participant properties, and optionally adjust the properties as required.

Activities

Add Conference Participants

- Click the **Add Participant** icon to select participants from the Phonebook, or manually add the name and phone number of a participant if they are not listed in the phonebook (see the following "[Add Phonebook Members](#)" and "[Add Non-Phonebook Members](#)").

Add Phonebook Members

1. Type the name of the participant. As text is entered, phonebook names that match the selection display. Alternatively, click the **Phonebook** icon to search the phonebook.
2. Click the wanted participant, and then select the number to use to dial into the conference.

Add Non-Phonebook Members

1. In the field, type the name of the participant to add.
2. Type the phone number that the participant is to use to connect to the conference.
3. Type the participant's email address. This email address is used if a conference invitation is sent to the participant.
4. Click **Next**.

Add a Conference Room

Use any of the methods in this section to add a conference room.

Add a New Conference Room Option

- Click the **Add Room** icon to configure an existing conference room or to manually add a new conference room if one is not listed.

A conference room is used to add multiple parties who are to be jointly dialing into a conference from a single extension. This is typically the case for conference and meeting rooms, where multiple parties dial into a conference via a Polycom or similar device

Add a Pre-Defined Conference Room

1. From the **Conference Room** list, select a conference room.
2. When the Conference Room Information window displays, verify that all settings are correct and then click **Next**.

Select a Conference Room from the Phonebook

1. In the **Select the Conference Room** field, type the conference room name to be added. As text is entered, phonebook names that match the selection display.
2. If there is more than one phone line associated with the conference room (such as a room containing a digital phone and an analog Polycom), select the number to be used to dial into the conference.

Adding a Conference Room Not Listed in the Phonebook

1. In the **Select the Conference Room** field, type the conference room name.
2. When the Conference Room Name window displays, type the phone number that the participants in the conference room need to use to dial into the conference.
3. Type the email address to be used if a conference invitation is sent to the participant.
4. When the Add Parties to the Conference Room window displays, click the **Add a Party to the Conference Room** icon to designate a party that is attending the conference (via the conference room).
5. In the **Name** field, type the party's name and then click **Next**.

Reserve Connections for the Conference

1. To reserve a specific number of connections for the conference without allocating these resources to a specific participant, click the **Add Unspecified Participants** icon.
2. When the Reserved Connections window displays, select the number of connections to reserve and then click **Next**.



Note: Re-running the above procedure modifies the number of connections that are reserved, rather than increasing the amount reserved.

Invite Users to a Running Conference

1. Click the **Add Participant** icon.
2. Use the wizard to select and add a new participant or conference room.
3. Verify the new participant details, and then click **Finish** to add a participant button for the new invitee.
4. Call or introduce the new invitee.
5. Click the **Accept** icon to confirm and add the participant to the conference.



Note: You can also use the Desktop Phonebook slider instead of the wizard to locate a phonebook user, and then drag the entry into the Conference window.

Send a Reminder

If a conference is currently running, inactive participants can be sent a reminder that the conference is in session. This reminder displays as a message alert on the user's screen. If the user fails to respond or is not logged into Desktop, Console, or Executive Insight, an outgoing call can be made to the user to introduce them into the conference.

1. Either:
 - Right-click the participant button of the invitee that has not yet joined the conference, and then select **Send Reminder**.
 - Click the **Send Reminder to All** icon to send a reminder to all participants that still need to attend the conference.

An alert message displays on the invitee's/invitees Desktop, notifying that the conference is in session.



Note: The Send a Reminder option only displays if the party being contacted is currently logged into Desktop, Console, or Executive Insight, otherwise use the **Introduce Party** icon.

Introduce a Party

Use the Introduce Party function to temporarily leave the conference call to contact another party. When the call to the other party connects, it is then possible to transfer the party into the running conference or to disconnect the call to that party and return to the conference call.

1. Right-click the participant button of an invitee that has not yet attended the conference., and then select **Introduce Party**. A private outgoing call initiates to the participant.
2. When the call connects, the invitee's participant button changes to display the following buttons:
 - **Accept** = Click to transfer both you and the invitee into the conference room.
 - **Decline** = Click to transfer you back into the conference room and hang up the invitee.

Adjust the Volume of the Conference

- Adjust the overall conference volume by dragging the volume control slider to the preferred level.



Note: Adjusting the conference volume control only affects the volume of the conference that you hear from your phone line.

Adjust the Microphone Input Level

- Drag the microphone slider on the Participant's button to set the microphone input sensitivity for that individual participant. If required, click the **Mute Microphone** icon on the Participant's button to mute the participant entirely and not be heard by any party in the conference.



Note: Changes made to the microphone input level of a participant affect input volume into the conference, and therefore affects the volume of the participant for all users in the conference.



Idea! Muting each participant in turn can help to isolate which line is injecting noise into a conference.

Regions

Split a Conference into Regions

Conference regions enable a conference to be split into two independent regions with participants grouped as either:

- Internal participant = Contains the participants listed in the global phonebook.
 - External participant = Contains all other conference participants.
1. During a conference, click the **Conference Regions** icon. The Conference window splits into an internal and external region.
 2. To remove the regions' view, click the **Conference Regions** icon again.

Move Participants Between Conference Regions

- Drag the Participant's button to the preferred region.

Private Conversations by Region

1. To enable each region to talk privately, right-click a region and then select **Private Conversation**.



Note: This function is only available when regions are active.

2. To turn off the private conversations function, right-click a region and then select **Merge Conversations**.

Remove a Participant from a Conference

This section describes how to remove both an active and inactive participant from a conference.

Remove an Active Participant from a Conference

A participant is considered active if they are currently attending the conference. The participant's button is grayed out if an invited member is not currently attending the conference.

- Right-click the participant's button to remove, and then click **Disconnect Party**.

Remove an Inactive Participant from a Conference

- Right-click the inactive participant's button, and then click **Remove**. The corresponding participant's button is removed from the Conference Information window.

Leave a Conference

Leave a Conference and Keep the Conference Information Tab Open

- Perform any of the following:
 - Click the **Leave Conference** icon.
 - In the Active Calls window, right-click the connected call and then click **Hang Up**.
 - Right-click your participant button, and then click **Leave**.

Leave a Conference Call and Close the Conference Information Tab

1. Click the **Close** icon.
2. When prompted, click either:
 - **Yes** to hang up the conference call and then close the Conference Information tab.
 - **No** to close the Conference Information tab, but remain connected to the conference call.

End a Conference Call

- Click the **End Conference** icon. The conference ends and all participants that are still connected to the conference call are disconnected.



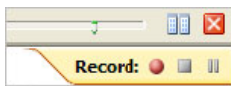
Note: This option is only available to the conference host.

Record a Conference

When creating a conference using the Conference wizard, the organizer has the option to configure the conference to automatically start recording. If this option is enabled, then the entire conference is recorded from the moment that the second participant enters the conference. The organizer can also specify whether individual participants may record excerpts of the conference.

Manually Record a Conference

- Click the **Record** icon. At any time, click the Pause or Stop icons to control the conference recording.



Note: The recording options are only visible if you have permission to record the conference. The ability to record a conference is controlled via Administrator security settings. The conference organizer also has the ability to override these security settings and deny participants the ability to create recordings.

Access the Recordings

- The Conferencing **History** folder lists all previously-completed conferences. Click the plus (+) symbol next to the conference name to display all the conference recordings.



Note: Only recordings that you have permission to access display.

Each listed recording contains a timeline that indicates which portions of the conference are included within that recording. See "[Recording Icons](#)" on page 3 for details on each recording icon.



Play a Recording

- Right-click a recording, and then select **Play Recording**. The recording automatically plays using the computer's default media player.

Download a Recording

1. Right-click a recording, and then select **Download Recording**.
2. Select the location where the file is to save, and then type a file name for the recording.
3. Click **Save**. The **Recording** symbol updates to indicate that the recording has been downloaded.

Empowered by Innovation

NEC

Corporate Headquarters (Japan)
NEC Corporation
www.nec.com

Oceania (Australia)
NEC Australia Pty Ltd.
www.nec.com.au

North America (USA)
NEC Corporation of America
www.necam.com

Asia
NEC Corporation
www.nec.com

Europe (EMEA)
NEC Unified Solutions
www.nec-unified.com

About NEC Corporation of America: Headquartered in Irving, Texas, NEC Corporation of America is a leading provider of innovative IT, network, and communications products and solutions for service carriers, and Fortune 1000 and SMB businesses across multiple vertical industries, including Healthcare, Government, Education, and Hospitality. NEC Corporation of America delivers one of the industry's broadest portfolios of technology solutions and professional services, including unified communications, wireless, voice and data, managed services, server and storage infrastructure, optical network systems, microwave radio communications, and biometric security. NEC Corporation of America is a wholly-owned subsidiary of NEC Corporation, a global technology leader with operations in 30 countries and more than \$38.5 billion in revenues. For more information, please visit www.necam.com.

© 2011 NEC Corporation. All rights reserved. NEC, the NEC logo, and UNIVERGE are trademarks or registered trademarks of NEC Corporation that may be registered in Japan and other jurisdictions. All trademarks identified with ® or ™ are registered trademarks or trademarks respectively. Models may vary for each country. Please refer to your local NEC representatives for further details.