



## **Table of Contents**

Add a Conference.....	2
Assigning Delegates.....	5
Creating Custom Greeting.....	5
Manage Recordings.....	6
Moderator Client.....	7
Launch Conference Moderator/Join.....	9
Add Participant.....	10
Outlook Plug-In Installation.....	12
Create a Conference.....	14
Manage a Conference.....	16
Conference Menus and Commands.....	17



## Creating Conferences

### Access

Your company's *managedIP* Administrator will assign you as a Host to one or more Meet-Me Conference Bridges. Once assigned, you will be able to access the Meet-Me Conference feature in your web portal. To access an assigned Meet-Me Conference Bridge:

1. Log in to the *managedIP* web portal (<https://www.tdsmanagedip.com>).
2. Navigate to Calling Features/Meet-Me Conferencing to access your assigned Conference Bridge(s).

Note: If you do not see the Meet-Me Conference option, your System Administrator has not assigned you as a Conference Host.

### To add a conference

1. Click the **Add** button to add a one-time, recurring, or reservationless conference. You may add an unlimited number of conferences, depending on your needs.
2. Select the Bridge Name that you desire to use. *If you only have one Bridge, it will automatically populate for you.*
3. Enter a descriptive title for the conference. The title will appear in your portal and when using the Moderator client.
4. Optionally, enter an Account Code.

Note: If you subscribe to Account Codes with reporting, this account code will be automatically assigned to every call associated with this Conference.

5. Enter the estimated number of participants for the conference. This will not restrict your conference, but is used by the system to best select available conference resources.
6. To restrict the number of participants on your conference, select this option and enter your desired value.
7. To mute all attendees on entry, check **Mute all attendees on entry**. This helps to prevent distracting background noises from conference participants who will primarily listen to the conference.

Note: Note that participants may unmute themselves after joining the conference, if desired.

8. To end the conference when the moderator leaves the conference, check **End conference when moderator departs**.
9. To specify that the conference cannot start without a moderator, check **Moderator required to start conference**.
10. Specify how to announce that a participant has joined or left the conference by selecting **Play Tone, Play recorded name, or No notification**.



11. Select the type of conference:
  - a. One Time – establishes a unique Conference for a single meeting that you may schedule. The Conference is only accessible during the specific day and time scheduled and will expire after the meeting is complete.
  - b. Recurring – establishes a unique Conference associated with a recurring meeting that is only accessible during the scheduled day and time.
  - c. Reservationless – establishes a Conference that may be used at any time, without any restrictions.
12. Specify the conference schedule:
  - a. For a reservationless conference, type the *Start Date* and the *End Date* in MM/DD/YYYY format or click the calendar icon to select the date. You may also select *Never* to prevent expiration of the Conference.
    - i. 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:SS format using 24-hour (or military) time format (e.g., 3:00 PM = "15:00:00"). Select the Duration time in hours and minutes using the drop-down menus.
    - ii. Specify the frequency of a recurring conference:
      1. Select **Daily** and enter the frequency in days.
      2. Select **Weekly**, enter the frequency in weeks, and check the day or days of the week to schedule the conference.
      3. Select **Monthly**, specify the frequency in months, and enter the day of the month to schedule the conference.
      4. Select **Yearly**, specify the frequency in years, and select the day of the year to schedule the conference.
13. Specify the end of a recurring conference. Select **Never**, specify the number of occurrences, or specify the end date.
14. Click **Save** to save your changes and settings.



**Meet-Me Conference Add**

Bridge Name: Sales MMC Bridge

\*Title: John's Weekly Update Meeting

Account Code:

Estimated number of participants: 10

Restrict number of participants to

Mute all attendees on entry

End conference when moderator departs

Moderator required to start conference

When attendees join/leave:  Play tone  Play recorded name  No notification

Type:  One Time  Recurring  Reservationless

**Schedule**

\*Start Time: 11/25/2015 15:30:00

\*Duration: 1 hours 30 minutes

Recurs: Weekly

Every: 1 week(s)

on  Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Never

End:  After 52 occurrences

Date

Cancel Save

15. To determine your Conference (Conference ID) and Moderator (Moderator PIN) access information, click the **Edit** button associated with the Conference on the Meet-Me Conferencing home page of the web portal.

Note: Click View button to list your available Conference(s) first.

16. In the *Conference Access*, note the Conference ID automatically assigned when it was created. This number must be entered on the telephone keypad by all participants when joining the Conference.
17. In the *Moderator Access*, note the Moderator PIN that was automatically assigned when the conference was created. This number must be entered on the telephone keypad when you are hosting a conference.



Conference Access	
Phone Number: 6082102414	
Conference ID: 824760	
Moderator Access	
Phone Number: 6082102414	<input type="button" value="Start Moderator Client"/>
Extension: 2414	
Moderator Pin: 54683040	

## Assigning Delegates

A conference delegate can modify and moderate the conference, but cannot delete the conference.

### To assign Conference Delegate(s):

1. Click **Edit** for the Conference you are modifying from the Meet-Me Conferencing home page of your web portal.

Note: Click View button to list your available conferences first.

2. In the Delegates section of Meet-Me Conferencing screen, search for user(s) you want to designate as delegates. Click **Add** or **Add All** to select the Delegate(s).
3. Click **Save** to keep your changes and settings.

## Modifying or Deleting a Conference

1. Click **Edit** for the Conference you want to modify from the Meet-Me Conferencing home page of your web portal.

Note: Click View button to list your available conferences first.

2. Change the desired parameter(s).
3. Click **Save** to keep your changes and settings.
4. To delete a conference, click **Delete** button and after step 1 above.

## Creating a Custom Conference Greeting

As a Conference Host, you can create a unique Custom Conference Greeting for each of your conferences from your *managedIP* voice portal. This greeting is played to all participants when they join your conference. Once recorded, you can activate or deactivate your custom greeting at any time without a need to re-record it.



You may use the Custom Conference Greeting to welcome participants and provide them any information prior to joining the conference. For example, your custom greeting may state, “Thank you for joining the weekly project meeting regarding our upcoming office move. Please refer to the meeting agenda and project timeline on our SharePoint site sent out prior to this conference to view your assigned tasks and due dates”.

#### **To create a custom greeting:**

1. Dial the voice portal from your *managedIP* phone by pressing \*00 – enter your passcode, if required
2. Press **3** for the Greetings Menu
3. Press **2** to change your conference greetings
4. Enter the extension of the Bridge Number associated with your conference and press **#**. You may also dial the 10-digit phone number of your Bridge.
5. Enter the 6-digit Conference ID associated with the Conference (do not enter the Moderator PIN)
6. Follow the voice portal instructions:
  - a. Press **1** to activate an existing conference greeting
  - b. Press **2** to deactivate an active conference greeting
  - c. Press **3** to record a new conference greeting
  - d. Press **4** to listen to a current conference greeting
7. Hang up

Each conference you create requires a unique Custom Conference Greeting; the same greeting may not be used for multiple conferences.

#### **Manage Recordings**

As a Meet-Me Conference Moderator (Leader), you have the ability to partially or entirely record all of your conference calls. After recording the call, you can listen via the *managedIP* web portal or download the recording (MP3 format) for up to 30 days before it expires.

#### **To record a Conference Call from your telephone**

1. Join conference call by dialing Bridge and entering Moderator PIN.
2. During conference, press “\*” for Help, then “5” to hear Recording options:
  - a. Press 1 – Start Recording
  - b. Press 2 – Pause/Resume Recording

Note: When pausing and resuming your recording, a single recording and file is created.

- c. Press 3 – Stop Recording

Note: When you stop a recording and start recording on the same conference, multiple files will be created.



## To Playback, Download or Delete a Conference Recording

1. Log in to your *managedIP* web portal.
2. Navigate to Meet-Me Conferencing.
3. Click **Listen** to display all recordings.
4. Click the **Play Control** to play and pause conference recording.
5. Click **Download** to download MP3 recording.

Note: Conference recordings will be retained for 30 days and then automatically deleted. Please download your recordings within 30 days of the conference(s) if you need to retain them beyond 30 days.

6. To delete a recording, check *Delete* and click on **Save**.

Conference Title	Bridge Name	Start Time	File Size	Listen	Delete
MMC Conf 2	Sales MMC Bridge	10/29/2014 01:47 PM	50.68 KB		
Joe's Conference Call	Sales MMC Bridge	11/07/2014 11:17 AM	82.18 KB	<b>Playback</b> ←	
Joe's Conference Call	Sales MMC Bridge	11/07/2014 11:18 AM	62.07 KB	<b>Delete</b> →	
Joe's Conference Call	Sales MMC Bridge	11/07/2014 11:19 AM	71.64 KB		
Joe's Conference Call	Sales MMC Bridge	11/07/2014 11:38 AM	64.04 KB	<b>Download</b> ←	

Showing 1 to 5 of 5 entries

First Previous **1** Next Last





## Moderator Client

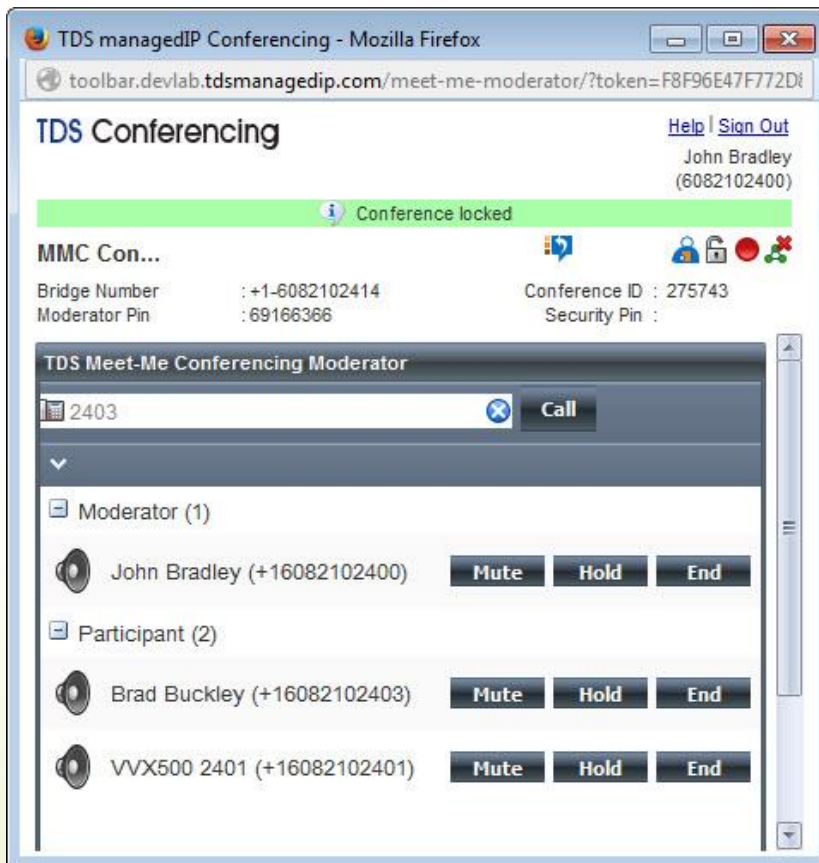
The Moderator Client is a web-based client that enables you, the leader and moderator of a Meet-Me Conference, to conveniently manage the conference from any web browser. You can moderate only one conference at a time; however, a conference may be managed by several moderators.

## 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 and Call History.
- **Dialer** – Allows you to add internal 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 Participants Lists** – List conference moderators and participants, with their phone number and status:
  - Active Talker 
  - Muted 
  - Unmuted 
  - On Hold 
- **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.





## Launch Conferencing Moderator and Join Conference

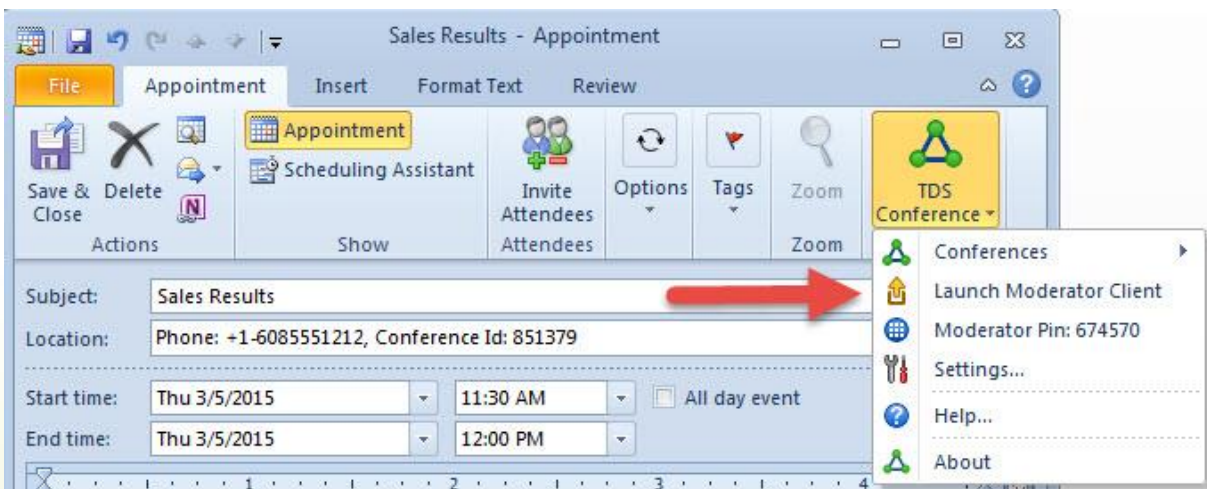
You can launch the Conferencing Moderator client either from the *managedIP* web portal or from the Outlook meeting if you included the conference to moderate in an Outlook meeting (Outlook Plug-In required).

### From the Moderator Client:

1. Launch the Moderator client:
  - a. Log into your *managedIP* web portal
  - b. Navigate to Calling Features / Meet-Me Conferencing
  - c. Select your Conference and click Edit
  - d. Click on Start Moderator Client button in the Moderator Access section of the Meet-Me Conference Modify screen



2. From the Outlook Plug-In:
  - a. Open your scheduled Outlook meeting with the conference details.
  - b. Click on the TDS Conference button.
  - c. Click on Launch Moderator Client.





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 your Outlook calendar meeting/invite.
3. To join the conference, click the Join Conference Link and enter your number or dial the conference number from your phone.
4. When prompted, enter the required PIN or PINS.

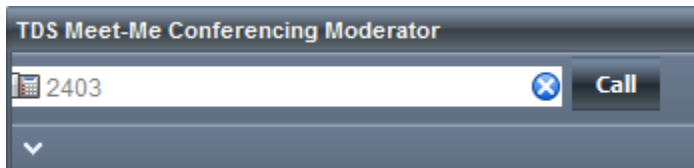
Note: In the following procedures, participant stands for participant or moderator.

## Add Participant

This is available if you have enabled individual outdial for the bridge.

Note: Outdialed numbers are limited to extensions within your organization. External numbers may not be outdialed.

- 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, a maximum of 100 participants can be unmuted. Unmuting participants from the Conferencing Moderator enables the users (or Moderator) to unmute the conference, even though the users remain in a muted state. When muting is activated in the Lecture Mode, users are prevented from unmuting their calls.

## 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 . You become the lecturer and the remaining participants are muted.
- To turn off the Lecture Mode, click Lecture Mode again .

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

### End Conference

- On the Conference header bar, click End Conference .

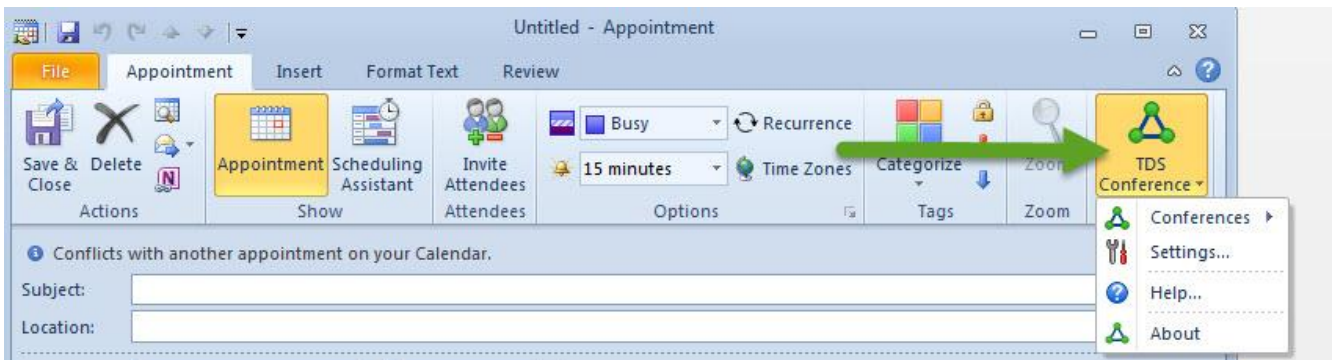
Note: All conference participants will hear an announcement providing the status of the recording.

## 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.



## Meet-Me Conferencing Outlook Plug-in



## Installing the Outlook Conferencing Plug-In

To install the Outlook Plug-In, visit the TDS *managedIP* Hosted support site at <http://support.tdsmanagedIP.com/hosted> and download the client. Launch the installation and follow the instructions provided.

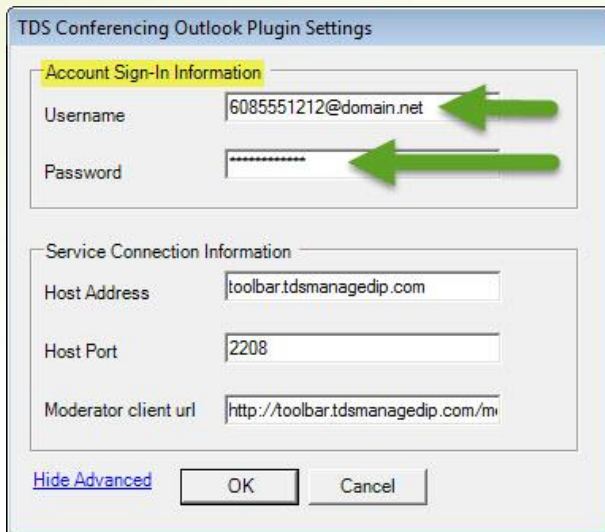
## Configure Your Credentials

The Conferences menu option is disabled until you configure your *managedIP* credentials.

1. Click **Settings**.
2. When User Settings window appears, enter your TDS *managedIP* web portal user name and password. These are also the same credentials used for the Assistant – Toolbar client.



3. Click Advanced link and verify that the Server Connection Information is populated (this information auto-populates for you when you install the TDS Conferencing Outlook Plug-In).
4. Click **OK**.

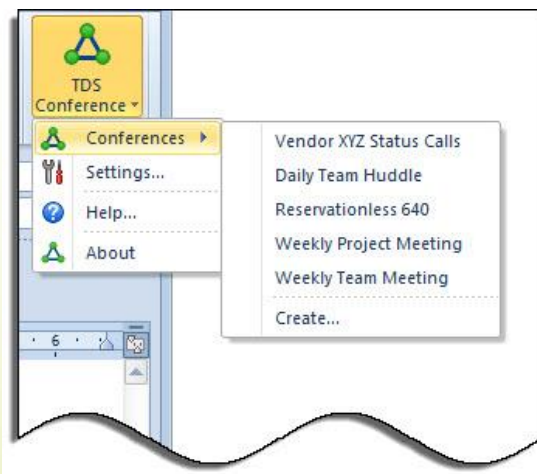


## Login Process

You do not have to manually log in to the Meet-Me Conferencing Outlook Plug-In. If you configure your credentials, the Plug-In logs you in as soon as you open a meeting. If the login fails (e.g., your credentials are entered incorrectly), the conference icon is grayed out.

## View Conferences

To view conferences for which you are a host or delegate, select Conferences from the TDS Conferencing Outlook Plug-In. To view more details about your conferences, log in to your *managedIP* web portal.





## Create A New Conference

You must have access to a Conference bridge to be able to create a Meet-Me Conference from Outlook.

Note: Your *managedIP* Administrator must assign you as a conference Host for each conference bridge you must access. Only scheduled conferences may be created in Outlook specific to the time schedule of the meeting you are scheduling. To include Reservationless conferences in your scheduled meeting, create the Reservationless conference first in the *managedIP* web portal.

1. In the Conferences view menu (see above), select **Create**. The Create a new conference dialog box appears.

Create a new conference

Bridge name: MMC 645

Conference name: Review Project Issues

Account code: [Empty]

Estimated number of participants: 10

Mute all attendees on entry

End conference when moderator depart

Moderator required to start conference

Security PIN

When attendees join/leave:

Play tone

Play recorded name

No notification

OK Cancel

2. Enter the required information. For details, see *Add Conference* section in this User Guide.
3. Click **OK**. The conference is created and the meeting invitation is populated with conference information.

## Include a Reservationless Conference in Meeting

Although you are unable to create a new Reservationless conference from Outlook, you may include an existing one in your scheduled meeting.

While scheduling a meeting in Outlook, from the TDS Conferencing menu, click Conferences, and then select an existing Reservationless conference from the list.



The body of the Outlook meeting invitation is populated with the conference invitation text. The text includes:

- Phone number of the bridge and Conference ID.
  - Though displayed as a 10-digit phone number, the participant may dial the associated extension number for the bridge if dialing from within your Enterprise.
  - The Conference ID is a six-digit code that must be entered by all participants when joining the conference.
  - The Moderator Pin is not displayed here, but may be obtained by clicking on the TDS Conference button with the Outlook meeting open.
- Security PIN is not supported at this time.
- The Join Conference link provides the participants a link to a web page where they can enter the number on which they want to be called back by the Conference bridge.
  - Callbacks may only be placed to internal extensions. Other phone numbers will not complete.
  - When the participant answers the call from the bridge, they will be prompted, “You have been invited to join a conference call. Please press “1” to join the conference”. Upon pressing “1”, the participant will be immediately joined to the conference, without need of entering the Conference ID.



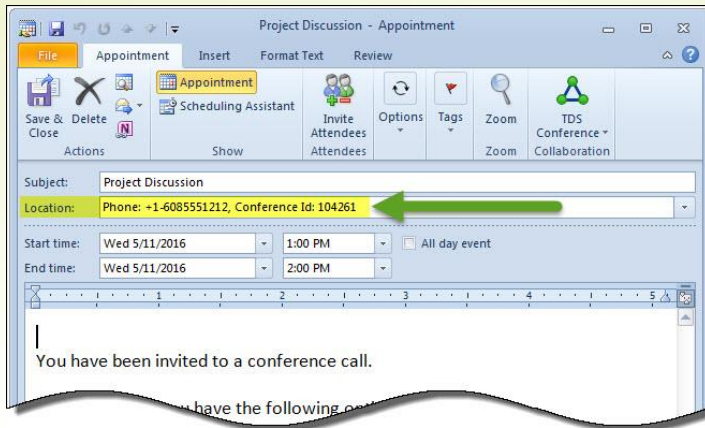
**Join a Conference**

The specified phone number is being called

Bridge Number : +1-6086645936  
Enter your phone number in the field below and click on Call to have the conference call you.

\* Phone Number

- The “Location.” Field of the Outlook meeting will auto-populate with the phone number and Conference ID of the scheduled conference. You may either leave this information intact, or replace it with other information.

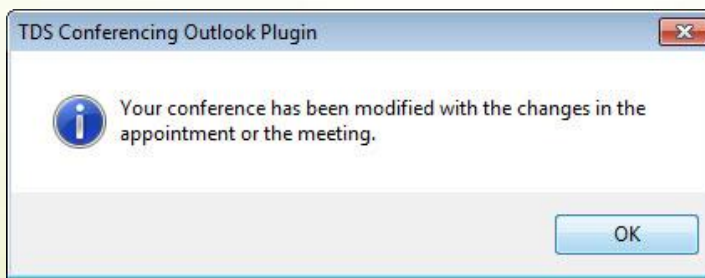


## Managing a Conference

If you desire to manage your conferences, including creating Reservationless conferences, modifying existing conferences, assigning delegates, or deleting conferences, please access the Meet-Met Conferencing function in your *managedIP* web portal described in this guide.

## Outlook Interactions

- When scheduling a meeting or recurring meeting with the Outlook Conferencing Plug-In, note the following:
  - Scheduling a new meeting or recurring meeting will create a new scheduled or recurring conference that corresponds to your scheduled meeting.
  - If you update your scheduled meeting in Outlook, the scheduled Conference will automatically update to correspond to your Outlook update.
  - When you delete an Outlook meeting that has a scheduled Conference, the Conference will be automatically deleted.
  - If the meeting is recurring and you delete one occurrence or if the conference is Reservationless, the conference is not modified.
  - These interactions require that you are logged in to the TDS Conferencing Plug-In while these Outlook functions are performed.
- Upon successful modifications of your Conference, you will see a dialog box that confirms your change(s):





## **TDS Conferencing Menus & Commands**

Telephone keypad conference control commands are available to both moderators and participants.

### **Moderator Menu**

You can invoke the Conference menu at any time during the conference by pressing “\*”. Only you hear the menu, while other participants continue talking in the conference; however, you do not hear the conference while invoking a command.

The following functions are available to moderators through the keypad 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
  - 1. Start Recording
  - 2. Pause/Unpause Recording
  - 3. Stop Recording
- 6 – Invite a new participant by calling the participant
- 8 – End conference
- # - Turn off music-on-hold or To return to the conference

### **Participant Menu**

Control functions are also available to conference participants (who are not moderators) and are accessible via a telephone keypad menu. You can invoke the 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 telephone keypad menu:

- \* - Repeat the menu options
- 0 – Transfer to Operator
- 1 – Mute or unmute myself (toggle)
- 2 – Participant count, followed by roll call
- 9 – Log in as moderator
- # – Turn off music-on-hold or To return to the conference



## **Notes**

If you do not want to listen to the menu, you can invoke an option by pressing "\*" followed by the digit(s) for the option you want. For example, you can press "\*" 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. A moderator may immediately join the conference as a moderator by entering their moderator PIN instead of the Conference ID.

## **Mute/Unmute**

A participant can only mute or unmute their own line. If a moderator has muted a participant's line, the participant cannot unmute it.

## **Music-on-Hold**

The first participant (or moderator) to join a conference will hear music until the second party joins the conference. To disable this music, a moderator or participant may press "#".

Also, if any participants within your Enterprise place an active conference on hold, the system will automatically disable the music to prevent distraction to the conference.

## **Transfer to Operator**

This function disconnects you from the conference and transfers you to a phone number defined by your *managedIP* Administrators for the conference bridge.