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# Interaction Conference

## User's Guide

### Abstract

This document contains the content for Interaction Conference User's Guide.

For the latest version of this document, see the PureConnect Documentation Library at: <http://help.genesys.com/cic>.

For copyright and trademark information, see [https://help.genesys.com/cic/desktop/copyright\\_and\\_trademark\\_information.htm](https://help.genesys.com/cic/desktop/copyright_and_trademark_information.htm).

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# Using Interaction Conference Microsoft Outlook plugin

This section explains how to schedule a conference call using the Interaction Conference Microsoft Outlook plugin.

1. If you have not installed the plugin, follow the steps in [Install the Interaction Conference Microsoft Outlook plugin](#).
2. To use Interaction Conference, your CIC system administrator must have granted access rights. Contact your system administrator to find out if these rights have been assigned to you. No special rights are required to call into a conference, however.
3. See [Schedule a Conference in Outlook](#) to learn how to use the plugin.

## Install the Interaction Conference Microsoft Outlook plugin

This procedure explains how to install Interaction Conference Microsoft Outlook plugin. This plugin enables you to schedule conferences within Microsoft Outlook 2010, Microsoft Outlook 2013, or Microsoft Outlook 2016. Run this installation on each workstation where a CIC user needs to schedule conference calls. The MSOutlook\_IConferencePlugins\_20xx\_Rx.msi is located in the IC\_InteractionConferenceMSOutlookPlugin shared directory on the CIC server. As patches become available, install the patches for Interaction Conference Microsoft Outlook plugin.

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### Prerequisites for Installing Interaction Conference Microsoft Outlook Plugin

The MSOutlook\_IConferencePlugins\_20xx\_Rx.msi installation program checks for the following requirements and does not continue until the prerequisites are met.

- **Microsoft Outlook 2010, Microsoft Outlook 2013, or Microsoft Outlook 2016**  
The Interaction Conference Outlook Plugin requires a 32-bit installation of Microsoft Outlook. The 64-bit versions of Microsoft Outlook are not supported.
- **Microsoft .NET Framework 4 (Full)**. The install looks for version 4.0.3031 or higher.  
If you do not have this version of the .NET Framework installed, use the dotNetFx40\_Full\_x86\_x64.exe installation program on the IC\_WorkstationPreReqs shared directory on your CIC server. For example, use \\CICServer\IC\_WorkstationPreReqs, where CICServer is the actual name of your CIC server.
- **Visual Studio Tools for Office version 4.0**. The install looks for version 10.0.31119 or newer.  
If you do not have this component installed, use the VSTOR40\_xx.exe installation program on the IC\_WorkstationPreReqs shared directory on your CIC server version 4.0 SU3 or newer. For example, use \\CICServer\IC\_WorkstationPreReqs, where CICServer is the actual name of your CIC server.
- **Primary Interop Assemblies for Microsoft Office 2010, Microsoft Office 2013, or Microsoft Office 2016**  
The primary interop assemblies are installed with certain features in Microsoft Office, but if those features are not installed, you must install them separately. For example with Microsoft Office 2010, use the o2010pia.msi installation program on the IC\_WorkstationPreReqs shared directory on your CIC server version 4.0 SU3 or newer. For example, use \\CICServer\IC\_WorkstationPreReqs, where CICServer is the actual name of your CIC server.

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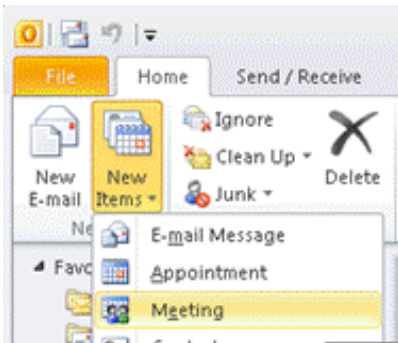
### To install the Interaction Conference Microsoft Outlook plugin on a workstation:

1. Start Windows Explorer (for example, open Computer or your Documents folder).
2. Type \\CICServerName\IC\_InteractionConferenceMSOutlookPlugin in the address field, replacing *CICServerName* with the name of your CIC server. Press **Enter**. If this folder does not exist, contact your network administrator. It is created when Interaction Conference components are installed on the CIC server.
3. Run (double-click) **MSOutlook\_IConferencePlugins\_20xx\_Rx.msi** from the folder on the CIC server. If your workstation does not have one or more of the prerequisites installed, a message appears indicating what to install first. See the Prerequisites for Installing Interaction Conference Outlook Plugin for instructions. Otherwise, click **Yes** when prompted to allow the program to run.
4. Wait for the install to finish. A message appears when installation is complete. To close the installer application, Click **OK**.
5. If Microsoft Outlook was running when you ran the install, close and restart Microsoft Outlook before proceeding. The Interaction Conference Microsoft Outlook plugin does not appear until Microsoft Outlook is restarted.

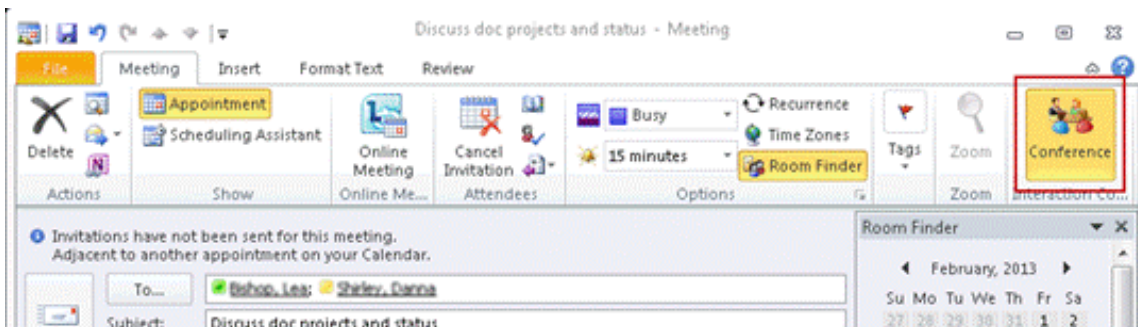
## Schedule a Conference in Outlook

This procedure explains how to schedule a conference using Microsoft Outlook and the Interaction Conference Outlook plugin.

1. On the Outlook Home tab, click **New Items** and select **Appointment** or **Meeting**.



2. On the Meeting (or Appointment) ribbon, click **Conference**. You can add meeting information before or after configuring the conference.



3. The first time you create a conference, the Interaction Conference server asks you to log on. Subsequent conference events do not require logging on unless something changes.



4. In the **Interaction Conference Login** dialog, enter the appropriate user ID and password, or select Use Windows Login Authentication to use your network account credentials, and then click **OK**.
5. In the Interaction Conference Options dialog, choose the [conference options](#).

**Interaction Conference**

Room: **IndyHQIC Conference Room (715-8020) - (866-287-85**

Account Code: **[none]**

Muting: **Enter conference unmuted and host may mute**

Recording: **Recorded and sent to hosts only**

Announce Enter: **Tone announcement**

Announce Exit: **Tone announcement**

Announce # Attendees: **Do not announce**

Resources: **10**

☐ Require host to start conference

☐ Disconnect call at the ending time

The body will not be filled in until the appointment is saved or sent.

**OK** **Cancel** **Remove**

- To save the selected options for this conference call, click **OK**. The actual body and details of the conference are not filled in on the server until you save or send the appointment.
- To remove the configuration options you selected so far and reset all values back to the default setting, click **Remove**
- To cancel the current configuration options but remember what you selected so far, click **Cancel**.

**Note:** The Interaction Conference entry is not created until you send the invitation in Outlook.

- If you clicked **OK** in Step 5, you can add invitation information in the body before you click **Send** to send the meeting request or appointment with a conference call. Once you send or save the meeting request, Interaction Conference creates the conference.

Discuss doc projects and status - Meeting

File Meeting Insert Format Text Review

Delete Appointment Scheduling Assistant Online Meeting Cancel Invitation Attendees 15 minutes Room Finder Tags Zoom Conference

Invitations have not been sent for this meeting. Adjacent to another appointment on your Calendar.

To... **Bishop, Lea** **Shirley, Danna**

Subject: **Discuss doc projects and status**

Location: **IndyHQIC Conference Room (715-8020) - (866-287-8976)** Rooms...

Start time: **Tue 2/12/2013** **9:30 AM** ☐ All day event

End time: **Tue 2/12/2013** **10:00 AM**

Let's catch up about all of our projects and the status of each.

In Shared Folder: **Calendar**

See more about: **Kuhns, Kevin.**

**Room Finder**

February, 2013

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2
3	4	5	6	7	8	9

☐ Good ☐ Fair ☐ Poor

Choose an available room:

**None**

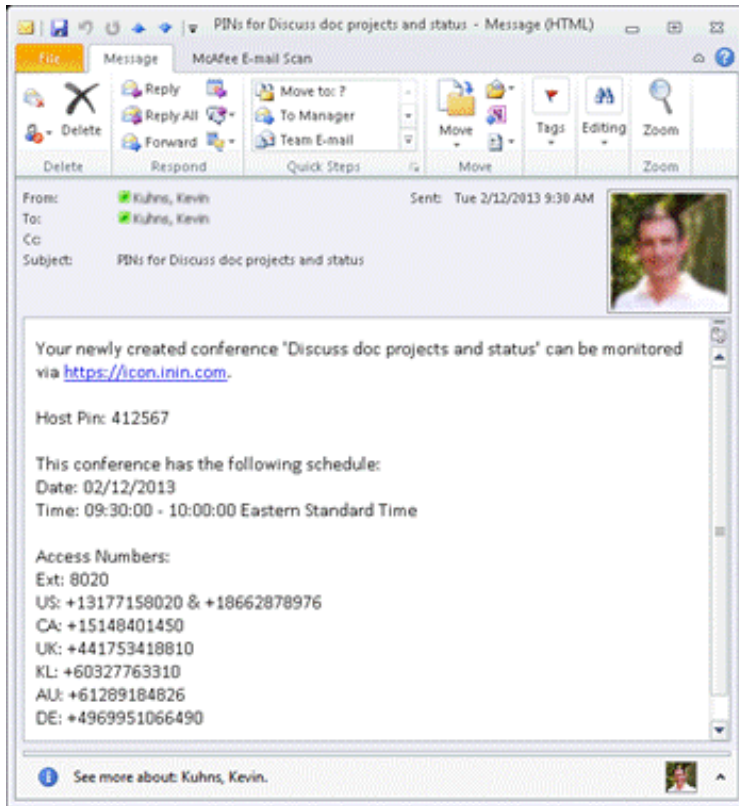
Suggested times:

**9:30 AM - 10:00 AM**

No conflicts

**Note:** Conferences are limited to 300 unmuted speakers. If you invite more than 300 attendees, the attendees joining the conference after the 300 limit join the conference muted.

- The creator and the recipients of the meeting request receive an email message with the details and call-in instructions of the scheduled conference call.



#### Related Topics

- [Conference Options](#)
- [Call a Conference](#)
- [Exit a Conference](#)

## Conference Options



Use the Interaction Conference options dialog box to set conference options. The default options presented and selectable are set in Interaction Administrator.

## Room

The conference room (physical or virtual) in which the conference takes place.

## Account Code

If account codes are defined and available for this user, select one from this list. The default value is **[none]**.

## Muting

This selection determines the audio behavior when conference participants call in to the conference.

**Muting is not allowed** – This setting disables the option to mute any conference attendees from the Conference Monitor webpage.

**Enter conference unmuted and host may mute** – Guests enter the conference unmuted, but the conference host can choose to mute individual participants. If more than 300 participants join the conference, only the first 300 to join the conference are audible. The 301<sup>st</sup> participant who is a guest (and other guests after) hear a prompt that they are joining the conference muted. If the conference host unmutes a host or guest, and there are 300 audible participants, Interaction Conference automatically mutes an audible guest who has been unmuted the longest to stay within the 300-audible-caller limit.

**Attendees enter the conference muted and host may unmute** – Conference guests enter the conference muted, but the conference host can choose to unmute individual participants. Use this option if you plan to have more than 300 participants in the conference. The host can selectively unmute up to 300 participants to speak.

## Recording

This selection determines if the conference call is recorded, and who receives the audio recording when the conference is over.

**Recorded and sent to hosts only** – Interaction Conference records the call and sends the recording to each person listed in the Hosts field for a conference call.

**Recorded and sent to everyone** – Interaction Conference records the call and sends the recording to all Hosts and Guests listed as participants in the conference call.

**None** – Interaction Conference does not record the call.

## Announce Enter



This selection determines how Interaction Conference announces attendees joining the conference.

**No announcement** – Participants join a conference call with no audio notification played to other participants on the conference call.

**Tone announcement** – When a participant joins a conference call, Interaction Conference plays a tone for all participants to hear that someone has joined.

**Recorded name announcement** – When participants call to join a conference, they are prompted to say their name. Interaction Conference then plays that name recording in the form "<YourName> has entered" to all participants in the conference.

## Announce Exit

This selection determines how Interaction Conference announces attendees when they disconnect to exit the conference.

**No announcement** – Participants can exit a conference at any time and no audio notification is played to other participants to indicate someone left the call.

**Tone announcement** – When a participant disconnects or exits a conference, Interaction Conference plays a tone for all other participants to hear someone has left the call.

**Recorded name announcement** – When a participant disconnects or exits a conference, they are prompted to say their name. Interaction Conference then plays that name recording in the form "<YourName> has left" to all participants in the conference when that attendee disconnects from the conference.

## Announce # Attendees

This selection determines if and how Interaction Conference announces the number of attendees in the conference.

**Do not announce** – Interaction Conference does not announce the number of attendees in the call.

**Announce only to host** – Interaction Conference announces the number of attendees only to the hosts of the conference.

**Announce to everyone** – Interaction Conference announces the number of attendees to all participants in the conference.

## Resources

Specify the number of participants expected in this conference. If you enter more than 300, and the **Muting** option is not set to **Attendees enter the conference muted and host may unmute**, a warning appears that conferences are limited to 300 unmuted speakers. The 301<sup>st</sup> attendee, and all after, enters the conference muted. If the host unmutes one of these attendees, Interaction Conference automatically mutes another attendee in the conference who has been audible the longest.

## Require host to start conference

Select this check box to require one of the conference hosts to be in the conference before it can start. If guests call in before the conference host, the guests hear a prompt and are put on hold with hold music until the conference host joins. If this check box is clear, conference guests can join the conference call and hear each other until the host joins the conference.

## Disconnect call at the ending time

Select this check box to disconnect the conference call at the specified end time. It plays a warning message 5 minutes before the end of the conference. Otherwise, the host ends the conference manually.

Click **OK** to save the options specified on the **Interaction Conference** options dialog. This does not create the conference – it only saves the options. Click the **Conference** button on the Outlook Appointment or Meeting page to edit the options again. Click **Save and Close** or **Send** on the appointment to actually create the conference entry on the Interaction Conference server.

Click **Cancel** to cancel the current configuration options but remember the options settings you selected so far.

Click **Remove** to remove any options selected so far and reset all options back to the default settings.

# Using the Interaction Conference Web Application

The Interaction Conference web application schedules conferences, and allows conference hosts to manage conferences. It also provides various reporting options.

Procedure	Performed by
<a href="#">Start the web application</a>	Conference host or facilitator
<a href="#">Log on to the Web Application</a>	Conference host or facilitator
<a href="#">Display conferences for a specific date</a>	Conference host or facilitator
<a href="#">Schedule a new conference</a>	Conference host or facilitator
<a href="#">Edit details of a scheduled conference</a>	Conference host or facilitator
<a href="#">Host a conference</a>	Conference host
<a href="#">Delete a conference</a>	Conference host or facilitator
<a href="#">Call a conference</a>	Conference invitee
<a href="#">Exit a conference</a>	Conference attendee
<a href="#">Monitor an active conference</a>	Conference host or facilitator
<a href="#">Display Reports</a>	Conference host, facilitator, or system administrator
<a href="#">Display Site Resource Utilization</a>	System Administrator
<a href="#">Log out of the web application</a>	Conference host, facilitator, or system administrator

## Start the web application

To start the Interaction Conference web application, point your browser to the Interaction Conference website, according to the information your system administrator provides. For example <http://lconferencewebservername/>. [Log on with your network account](#) credentials to access the application.

## Log on to the Web Application

When you open the Interaction Conference web application, it prompts for Windows domain account or CIC login credentials.

The image displays two versions of the Logon form side-by-side. Both forms have a title 'Logon' and a light beige background. The left form, labeled 'Single Conference server defined' at the bottom, contains a 'User Id' field with 'administrator' entered, a 'Password' field with masked characters, a checked 'Remember me' checkbox, and a 'Logon' button. The right form, labeled 'Multiple Conference servers defined' at the bottom, includes an additional 'Host(s)' dropdown menu with 'Internal Conference' and 'External Conference' as options, along with the same 'User Id', 'Password', 'Remember me' checkbox, and 'Logon' button.

### User ID

Type your CIC user name in this field, or your Windows domain account user name in the form *domain\username*.

### Password

Enter the corresponding CIC password or Windows domain account password.

### Host(s)

If the administrator has defined multiple servers that you can select, the **Host(s)** box appears. Click the Interaction Conference host for the call to use. To select multiple servers, hold down the Ctrl key while clicking the host names.

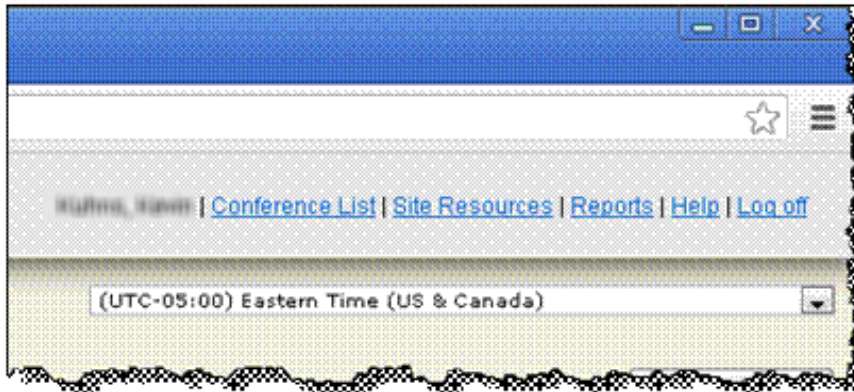
### Remember me check box

Check this box to have the webpage remember your logon credentials.

### Logon button

Sends supplied credentials to the server for validation.

## How Time Zones Are Displayed



At the upper right corner of most Interaction Conference pages, the Time Zone list box displays the time zone that Interaction Conference is using for the conference. By default, Interaction Conference uses the web server's time zone. To display a different time zone, expand the list and select the time zone you want. Changing the time zone in the list box only changes the time zone display on the page.

## Using the Conference List Page

A screenshot of the GENESYS Conference List page. The page header shows the GENESYS logo and navigation links: "admin", "Conference List", "Site Resources", "Reports", "Help", and "Log off". Below the header, there is a calendar for October 2017 on the left and a table of conferences for the week of Sunday, September 24, 2017, to Saturday, September 30, 2017. The time zone dropdown menu at the top right shows "(UTC-05:00) Eastern Time (US & Canada)". The table has columns for Id, Owner, Title, Room, Start Date, End Date, Schedule, Resources, Status, and Action. The table lists several recurring conferences, all hosted by "admin" in a "Virtual Room".

Id	Owner	Title	Room	Start Date	End Date	Schedule	Resources	Status	Action
30f...	admin	admin's Conference Host: admin	Virtual Room	09/24/2017 10:00 ...	09/24/2017 10:05 ...	Recurring	10	Completed	<a href="#">View</a>
30f...	admin	admin's Conference Host: admin	Virtual Room	09/25/2017 10:00 ...	09/25/2017 10:05 ...	Recurring	10	Completed	<a href="#">View</a>
30f...	admin	admin's Conference Host: admin	Virtual Room	09/26/2017 10:00 ...	09/26/2017 10:05 ...	Recurring	10	Completed	<a href="#">View</a>
30f...	admin	admin's Conference Host: admin	Virtual Room	09/27/2017 10:00 ...	09/27/2017 10:05 ...	Recurring	10	Scheduled	<a href="#">Edit</a>   <a href="#">Delete</a>
30f...	admin	admin's Conference Host: admin	Virtual Room	09/28/2017 10:00 ...	09/28/2017 10:05 ...	Recurring	10	Completed	<a href="#">View</a>
30f...	admin	admin's Conference Host: admin	Virtual Room	09/29/2017 10:00 ...	09/29/2017 10:05 ...	Recurring	10	Completed	<a href="#">View</a>
30f...	admin	admin's Conference Host: admin	Virtual Room	09/30/2017 10:00 ...	09/30/2017 10:05 ...	Recurring	10	Completed	<a href="#">View</a>

The Conference List appears when you log on to Interaction Conference and when you click the **Conference List** hyperlink. This page lists scheduled and completed conferences for the week containing the date selected in the calendar control. This list includes recurring conferences valid in the selected dates.

You can define new conferences from this page, and edit or delete previously scheduled conferences. You can also view details of completed conferences. Completed conferences cannot be deleted to preserve recordings and other data. The database overhead of completed conferences is low. Purging is not necessary.

**Note:** The Time Zone list box at the upper right corner of the page displays the time zone that Interaction Conference is using for the conference. By default, Interaction Conference uses the web server's time zone. To display a different time zone, expand the list and select the time zone you want. Changing the time zone in the list box only changes the time zone display on the page.

### Display only your own conferences

To display only your own conferences, select the **Display only my conferences** check box at the top of the conference list. By default, the list shows all conferences.

---

## Display conferences for a specific week

To display a list of conferences that are scheduled to occur during a specific week:

1. If needed, use the < and > links on the Calendar control to change the month.
2. Click any date in the week you want to display. The list of conferences for that week appears in a grid on the right. The grid is empty if there are no conferences.

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## Add a new conference

See [Schedule a New Conference](#).

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## Host a conference

If you are a conference coordinator or host, you can [monitor an active conference](#) to perform call control operations.

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## Delete a conference

To delete a scheduled conference, click the **Delete** hyperlink for that row in the Conference List. Interaction Conference displays a dialog box asking if you want to delete the conference. To delete the conference, click **OK**. Users are notified when conferences are deleted. Completed conferences cannot be deleted.

---

## Recordings

Conferences can be recorded and sent as email attachments to the hosts, to all invitees, or to no one. Interaction Conference does not use Interaction Recorder. Interaction Conference does not support recordings generated by Interaction Recorder.

## Schedule a new conference

To schedule a new conference:

1. [Start the web application](#).
2. [Log on to the web application](#). The *Conference List* page appears.
3. Click the **New Conference** button to display the Create/Edit Conference page.

**Note:** When you create a conference, the page already contains default values that you can accept or modify. Typically, you modify the values.

4. Configure the basic information section to establish overall features and invite attendees.
5. Configure the schedule section to set date, time, and recurrence options.
6. Configure the settings section to set conference options.
7. (Optional) Add an agenda or other notes in the **Notes** text box.
8. Click **Save**. The new conference appears in the [Conference List](#).

## Configure Basic Information

A new conference includes some basic information by default, but you can edit and add more information about the conference in the Basic Information section:

1. Add basic information about the conference:
    - a. In the **Hosts** text box, type the email addresses of the conference host or hosts.
    - b. In the **Guests** text box, type the email addresses of the conference guests.
- Note:** The Hosts and Guests boxes offer to auto-complete any address in your email directory by using first name, last name, "FirstName LastName", or "LastName, FirstName".
- c. Use the Room drop list to select Virtual Room that was configured in Interaction Administrator. A virtual room is mapped to an external number, and does not require a station phone in a physical location.
  - d. Type a descriptive name in the **Title** field. This title is used to identify the conference in the Conference List, and it appears in email notifications sent to attendees.
  - e. If your organization uses account codes to associate conference calls with particular business entities, select an account code from the **Code** drop list. As an alternative, you can leave the default value [none] selected, if account codes are not required for reporting purposes.
2. Interaction Conference generates default PIN numbers for hosts and guests. If you want to customize the number, you can assign your own PINs to hosts and guests:
    - a. In the **Pin** text box to the right of the **Hosts** text box, type a PIN for the host or hosts.
    - b. In the **Pin** text box to the right of the **Guests** text box, type a PIN for the invitees or select the **Individual Pins** check box to assign a different PIN to each invitee.

3. In the **Resources** text box, type the number of resources that the conference requires. This number is the estimated number of attendees.

**Note:** Interaction Conference permits up to 300 simultaneous audible (unmuted) attendees. If the conference is configured so attendees join unmuted, additional callers are automatically muted when they join. If the conference host unmutes a caller, Interaction Conference mutes one of the audible callers. If possible, it mutes a guest attendee who has been unmuted the longest, rather than a host attendee.

---

## Configure the Schedule



The screenshot shows a configuration interface for a conference schedule. It includes a 'Type' dropdown menu set to 'Single', a 'Schedule' field with the date '02/12/2013', a 'Start' time field set to '06:00 PM', and an 'End' time field set to '07:00 PM'. A 'Check Conflicts' button is located on the right side of the section.

In the Schedule section:

1. Expand the Type list box and select **Single**, **Open**, or **Recurring**:
  - **Single** defines a conference that happens once. Only one occurrence of the conference is created.
  - **Open** defines a conference that is open 24 hours a day and not limited to a specific time.
  - **Recurring** defines a conference that recurs automatically at a specified interval. The Conference is recreated multiple times based upon recurrence attributes. The **Schedule**, **Start**, and **End** fields are the same as for a non-recurring conference. In addition, set [recurrence options](#), which vary according to the type selected.
2. For a single conference, set the date and time:

### Schedule

Date when the conference starts.

### Start

Time when the conference starts. Enter the time using the time zone of the IIS web server.

### End

Time when the conference ends.

**Note:** If you try to schedule a conference that begins before midnight and ends after midnight, Interaction Conference displays a warning message. You can then choose to save the conference with the times you indicated or correct the times.

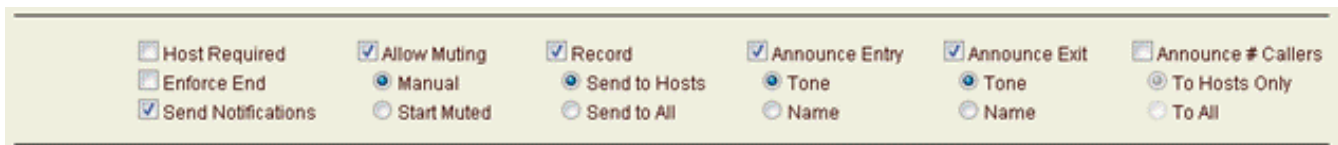
3. For a recurring conference, set the date, time, and recurrence options.

For more information, see [Understanding Recurrence Options](#).

4. Click **Check Conflicts** to display and correct any scheduling conflicts.

---

## Configure Settings and Notes



The screenshot shows a settings interface with two rows of options. The first row includes: 'Host Required' (checkbox), 'Allow Muting' (checkbox), 'Record' (checkbox), 'Announce Entry' (checkbox), 'Announce Exit' (checkbox), and 'Announce # Callers' (checkbox). The second row includes: 'Enforce End' (checkbox), 'Manual' (radio button), 'Send to Hosts' (radio button), 'Tone' (radio button), 'Tone' (radio button), and 'To Hosts Only' (radio button). The third row includes: 'Send Notifications' (checkbox), 'Start Muted' (radio button), 'Send to All' (radio button), 'Name' (radio button), 'Name' (radio button), and 'To All' (radio button).

In the Settings section, use check boxes, and radio buttons to set conference attributes:

### Host Required

Select this check box to require one of the conference hosts to be in the conference before it can start. If guests call in before the conference host, the guests hear a prompt and are put on hold with hold music until the conference host joins. If this check box is clear, conference guests can join the conference call and hear each other until the host joins the conference.



## Enforce End

Select this check box to disconnect the conference call at the specified end time. Interaction Conference plays a warning message 5 minutes before the end of the conference. Otherwise, the host ends the conference manually.

## Send Notifications

Select this check box to notify all conference participants about the conference end time. Interaction Conference also sends an email to notify conference participants when the conference is saved or modified.

## Allow Muting:

Select this check box to enable the host or Interaction Conference to mute participants. If you do not select this check box, muting is not allowed from the Interaction Conference Monitor webpage.

The **Manual** radio button requires the host to mute participants manually.

The **Start Muted** radio button mutes all guests by default; hosts are not muted by default. Conference guests enter the conference muted, but the conference host can choose to unmute individual participants. Use this option if you plan to have more than 300 participants in the conference. The host can selectively unmute up to 300 participants to speak. If you do not select **Start Muted** and if there are more than 300 participants, only the first 300 to join the conference are audible. The 301<sup>st</sup> participant who is a guest (and other guests after) will hear a prompt that they are joining the conference muted. If the conference host unmutes a host or guest, and there are 300 audible participants, Interaction Conference automatically mutes an audible guest who has been unmuted the longest to stay within the 300-audible-caller limit.

Hosts (those names listed in the **Hosts:** section of the New Conference dialog) automatically enter the conference unmuted, unless there are 300 Hosts already audible in the conference.

## Record

Select this check box to make Interaction Conference record the conference.

Select the **Send to Hosts** radio button to have Interaction Conference send the conference recording only to the conference hosts.

Select the **Send to All** radio button to have Interaction Conference send the conference recording to all conference participants.

## Announce Entry

Select this check box to determine how Interaction Conference announces attendees joining the conference, then select the **Tone** or **Name** radio button. Clear this check box to make Interaction Conference not announce attendees when they join a conference.

Select the **Tone** radio button to play a tone each time an attendee joins the conference.

Select the **Name** radio button to make Interaction Conference prompt attendees to record their name before joining. Interaction Conference plays the recorded name in the form "<YourName> has entered" to all other attendees in the conference.

## Announce Exit

Select this check box to determine how Interaction Conference announces attendees when they disconnect to exit the conference, then select the **Tone** or **Name** radio button. Clear this check box to make Interaction Conference not announce attendees when they exit a conference.

Select the **Tone** radio button to play a tone each time an attendee exits the conference.

Select the **Name** radio button to make Interaction Conference prompt attendees to record their name before joining. Interaction Conference plays the recorded name in the form "<YourName> has left" to all other attendees in the conference.

## Announce # Callers

Select this check box to determine how Interaction Conference announces the number of attendees in the conference, then select the **To Hosts only** or **To All** radio button. Clear this check box to make Interaction Conference not announce the number of callers in a conference.

Select the **To Hosts only** radio button to make Interaction Conference announce the number of attendees only to the hosts of the conference.

Select the **To All** radio button to make Interaction Conference announces the number of attendees to all participants in the conference.

In the **Notes** text box, add an agenda or other information about the conference. Interaction Conference sends that information along with the conference invitation.

---

## Save the Conference

After you have configured basic information, schedule, and settings for the conference:

- Click **Save** to save the new conference.

The new Conference appears on the [Conference List Page](#).

---

## Understanding Recurrence Options

When you create a recurring conference, specify the start and end time of day, the recurrence interval, and the start and end date. Recurrence intervals are Daily, Weekly, Monthly, and Yearly, with specific options for each.

**Recurrence Settings**

Start Time: 06:00 PM End Time: 07:00 PM

☒ Daily  
☐ Weekly  
☐ Monthly  
☐ Yearly

☒ Every 1 day(s)  
☐ Every weekday (Monday - Friday)

Start Date: 02/18/2013

☒ End after: 1 occurrence(s)  
☐ End by: 03/25/2013

OK

**Recurrence Settings**

Start Time: 06:00 PM End Time: 07:00 PM

☐ Daily  
☒ Weekly  
☐ Monthly  
☐ Yearly

Recur every 1 week(s) on:

☐ Sunday ☒ Monday ☐ Tuesday  
☐ Wednesday ☐ Thursday ☐ Friday  
☐ Saturday

Start Date: 02/18/2013

☐ End after: 1 occurrence(s)  
☒ End by: 03/25/2013

OK

**Recurrence Settings**

Start Time: 06:00 PM End Time: 07:00 PM

☐ Daily  
☐ Weekly  
☒ Monthly  
☐ Yearly

☒ Day 1 of every 1 month(s)  
☐ The first day of every 1 month(s)

Start Date: 02/18/2013

☐ End after: 1 occurrence(s)  
☒ End by: 03/25/2013

OK

**Recurrence Settings**

Start Time: 06:00 PM End Time: 07:00 PM

☐ Daily  
☐ Weekly  
☐ Monthly  
☒ Yearly

☐ Every January 1  
☒ The last Tuesday of January

Start Date: 02/18/2013

☐ End after: 1 occurrence(s)  
☒ End by: 03/25/2013

OK

## Recurrence Interval

Specify the interval for the conference call. This interval can be Daily, Weekly, Monthly, or Yearly.

- **Daily**

Every \_\_\_ day(s)

Enter a number to specify the daily frequency. For example, enter 1 to create a conference call that occurs every day (seven days a week), or 2 to create a call that occurs every other day, seven days a week, and so on.

Every weekday (Monday-Friday)

Select this option to create a daily conference each weekday, Monday through Friday.

- **Weekly**

Recur every \_\_\_\_ week(s) on:

Enter a number to specify the weekly interval for a conference. For example, enter 1 to create a call each week, enter 2 to specify the call every other week, and so on. Then select a check box by the days of the week for the call. You can specify one or more days each week.

- **Monthly**

Day \_\_\_\_ of every \_\_\_\_ month(s)

Select a day of the month to schedule the conference to recur on a specific day each month, or after an interval of months, such as on the 10th day of every other month.

The \_\_\_\_ of every \_\_\_\_ month(s)

You can select the first, second, third, fourth, or last day, weekday, weekend, or day of the week, each month, and an interval of months. For example you can schedule a conference on the first day of every third month, or on the second Tuesday of each month, or a quarterly conference call on a specific day.

- **Yearly**

Every \_\_\_\_

Select a Month and a specific day of the month, or scope the conference to the first, second, third, fourth, day, weekday, weekend, or day of the week, for any specific month of the year.

The \_\_\_\_ of \_\_\_\_

Specify the yearly interval of a conference. For example, you can schedule a conference on the first Thursday of January each year.

## Start Date and End by

Each recurring conference must have a start and end date, or you can specify it ends after a set number of conference occurrences.

---

## Edit details of a scheduled conference

1. To edit settings for a scheduled conference, [start the web application, log on](#), and then click the [Conference List](#) hyperlink.
2. Click the **Edit** hyperlink for the conference that you want to edit. Then change parameters on the [Invitees](#), [Settings](#), and [Schedule](#), tabs as needed.

If you edit a recurring conference, Interaction Conference asks if you want to edit all occurrences or a specific occurrence of a conference.

3. When you are finished, click **Save**.

**Note:** Interaction Conference allows you to edit conferences even while they are in progress. See the section [Edit an active conference](#).

---

## Monitor an active conference

The web application makes it easy to monitor active conferences. Depending upon the configuration settings of the conference, conference hosts can start the conference, pick up or mute users, and refresh the list of current attendees.

### To monitor an active conference:

1. To monitor an active conference, [start the web application](#), [log on](#), and then click the [Conference List](#) hyperlink.
2. Click the **Monitor** hyperlink for the conference you want to monitor.
3. A page for the active conference is displayed. This page has two tabs. The default tab is **Attendees**. It displays a list of persons who have called into the conference. To update this page, press the **Refresh** button.

The **Invitees** tab lists the name, email address, remote phone number, type (Host or Guest), and PIN number of each person who was invited to join the conference.

## Attendees tab

This tab displays information about attendees of the conference.

### Name

The user name that was configured when the invitee was defined for the conference.

### Remote Name

The ID of the telephone associated with the incoming call, if applicable.

### Number

The caller's telephone number, if it was supplied in the invitee configuration.

### Type

The type identifies the attendee as a host or guest.

### Enter

The date and time when the attendee entered the conference.

### Exit

The date and time when the attendee exited the conference.

### Status

Indicates whether the attendee is connected, disconnected, on hold or muted.

### Call ID

The Call ID number of each attendee. Every call in the Customer Interaction Center has a unique Call ID.

### Action

This column provides links that are appropriate for the attendee's status.

Status	Available Actions
Connected	Mute, Hold, Drop
On Hold	Pick Up, Drop
Muted	Unmute, Hold, Drop

## Global Action buttons

Global Action buttons apply to all attendees.

### **Pick up All**

Picks up all attendee calls that are currently on hold.

### **Unmute Guests**

Umutes all calls.

### **Mute Guests**

Mutes all calls except the host.

### **Invitees tab**

When this tab is selected while monitoring a conference, information about conference invitees is displayed. This view lists the name, email address, remote telephone number, conference type, and PIN number that the invitee must submit to join the conference.

#### **Name**

The name of the invitee.

#### **Email**

The email address of the invitee.

#### **Number**

The invitee's telephone number.

#### **Type**

The type identifies the invitee as a host or guest.

#### **PIN**

The Personal Identification Number that the invitee must submit to join the conference.

---

## **Edit an active conference**

The web application makes it easy to edit active conferences.

### **To edit an active conference:**

1. [Start the web application](#), [log on](#), and then click the [Conference List](#) hyperlink.
2. Click the **Edit** hyperlink for the conference you want to edit.
3. Change parameters on the [Invitees](#), [Settings](#), and [Schedule](#) tabs as needed.
4. When you are finished, click **Save**.

## End an active conference

If you end an active conference with attendees still in the conference, Interaction Conference disconnects the attendees.

1. [Start the web application, log on](#), and then click the [Conference List](#) hyperlink.
2. Click the **End** hyperlink for the active conference you want to edit.
3. Click **OK** to end the conference.

## Reports



Title ▲	Description	Action
Conferences By Account Code	Listing of conferences sorted by account code.	<a href="#">Run</a>
Conferences By Date	Listing of conferences sorted by date of occurrence.	<a href="#">Run</a>
Conferences By Room	Listing of conferences sorted by room.	<a href="#">Run</a>
Conferences By Type	Listing of conferences sorted by type.	<a href="#">Run</a>

Interaction Conference provides four simple reports that you can filter by date range, and which are sorted by different report configuration data. To see the list of reports, click the Reports hyperlink at the top of the Interaction Conference web application. The reports are sorted and named accordingly:

- [By Account Code](#). A listing of conferences sorted by account code.
- [By Date](#). A listing of conferences sorted by date of occurrence.
- [By Room](#). A listing of conferences sorted by room.
- [By Type of Conference](#). A listing of conferences sorted by Schedule Type (Single, Recurring, or Open).

To run a report, click the **Run** hyperlink for a report type. For each report, you can specify the date range and click **Generate**, to generate the list of conferences that were scheduled for that date. To save the report data to a .CSV file, click the **Download** button on each report page. The report(x).csv file appears in your browsers Download folder.

## Conferences by Account Code Report

This report lists conferences sorted by account code. All conferences are listed by default. To filter the list to specific start and end dates, click the calendar icon next to the date fields above the detail lines. Then click **Generate** to apply the date parameters to the report.

GENESYS

admin | [Conference List](#) | [Site Resources](#) | [Reports](#) | [Help](#) | [Log off](#)

Start Date: 09/25/2017

End Date: 10/25/2017

Generate

(UTC-05:00) Eastern Time (US & Canada)

Download

Id	Title	Room	Type	Date	Time	Account Code ▲
30fde314-40	admin's Conference	Virtual Room	Recurring	9/25/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	9/26/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	9/27/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	9/28/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	9/29/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	9/30/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/1/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/2/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/3/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/4/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/5/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/6/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/7/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/8/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/9/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/10/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/11/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/12/2017	10:00 AM - 10:05 AM	-

You can click column headings to sort columns. The columns are:

### ID

The identification number that Interaction Conference assigned to the conference.

### Title

The title of the conference, as it was configured on the [Settings tab](#).

### Room

The conference room assigned to the conference.

### Type

The schedule type of the Conference, which is either Single, Recurring, or Open. *Single* indicates a conference that happens once. *Recurring* indicates a conference that recurs automatically at a specified interval. *Open* means that the conference is open 24 hours a day and not limited to a specific time.

### Date

The date when each conference occurred.

### Time

The time when each conference occurred.

### Account Code

The billing code assigned to the conference, if any.



# Conferences by Date Report

GENESYS

admin | [Conference List](#) | [Site Resources](#) | [Reports](#) | [Help](#) | [Log off](#)

Start Date: 09/20/2017

End Date: 10/25/2017

Generate

(UTC-05:00) Eastern Time (US & Canada)

Download

Id	Title	Room	Type	Date ▲	Time	Account Code
30fde314-40	admin's Conference	Virtual Room	Recurring	9/20/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	9/21/2017	10:00 AM - 10:05 AM	-
70b3e614-4	admin's Conference	Virtual Room	Single	9/22/2017	9:54 AM - 11:00 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	9/22/2017	10:00 AM - 10:05 AM	-
25c3e614-3	admin's Conference	Virtual Room	Single	9/22/2017	2:40 PM - 4:00 PM	-
7fcca614-aa	admin's Conference	Virtual Room	Single	9/22/2017	5:32 PM - 7:00 PM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	9/23/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	9/24/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	9/25/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	9/26/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	9/27/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	9/28/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	9/29/2017	10:00 AM - 10:05 AM	-
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30fde314-40	admin's Conference	Virtual Room	Recurring	10/2/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/3/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/4/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/5/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/6/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/7/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/8/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/9/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/10/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/11/2017	10:00 AM - 10:05 AM	-
30fde314-40	admin's Conference	Virtual Room	Recurring	10/12/2017	10:00 AM - 10:05 AM	-

This report lists conferences sorted by date. All conferences are listed by default. To filter the list to specific start and end dates, click the calendar icon next to the date fields above the detail lines. Then click **Generate** to apply the date parameters to the report. You can click column headings to sort columns. The columns are:

## ID

The identification number that Interaction Conference assigned to the conference.

## Title

The title of the conference, as it was configured on the [Settings tab](#).

## Room

The conference room assigned to the conference.

## Type

The schedule type of the Conference, which is either Single or Recurring. *Single* indicates a conference that happens once. *Recurring* indicates a conference that recurs automatically at a specified interval.

## Date

The date when each conference occurred.

## Time

The time when each conference occurred.

## Account Code

The billing code assigned to the conference, if any.

# Conferences by Room Report

GENESYS

admin | [Conference List](#) | [Site Resources](#) | [Reports](#) | [Help](#) | [Log off](#)

Start Date: 09/20/2017

End Date: 10/25/2017

Generate

(UTC-05:00) Eastern Time (US & Canada)

Download

ID	Title	Room	Type	Date	Time	Account Code
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/20/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/21/2017	10:00 AM - 10:05 AM	-
70b3e614-4	admin's Conference	Virtual Room	Single	9/22/2017	9:54 AM - 11:00 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/22/2017	10:00 AM - 10:05 AM	-
25c3e614-3	admin's Conference	Virtual Room	Single	9/22/2017	2:40 PM - 4:00 PM	-
7f0ce614-aa	admin's Conference	Virtual Room	Single	9/22/2017	5:32 PM - 7:00 PM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/23/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/24/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/25/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/26/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/27/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/28/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/29/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/30/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/1/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/2/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/3/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/4/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/5/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/6/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/7/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/8/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/9/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/10/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/11/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/12/2017	10:00 AM - 10:05 AM	-

This report lists conferences sorted by room. All conferences are listed by default. To filter the list to specific start and end dates, click the calendar icon next to the date fields above the detail lines. Then click **Generate** to apply the date parameters to the report. You can click column headings to sort columns. The columns are:

## ID

The identification number that Interaction Conference assigned to the conference.

## Title

The title of the conference, as it was configured on the [Settings tab](#).

## Room

The conference room assigned to the conference.

## Type

The schedule type of the Conference, which is either Single or Recurring. Single indicates a conference that happens once. Recurring indicates a conference that recurs automatically at a specified interval.

## Date

The date when each conference occurred.

## Time

The time when each conference occurred.

## Account Code

The billing code assigned to the conference, if any.

# Conferences by Type Report

GENESYS

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Start Date: 09/20/2017

End Date: 10/25/2017

Generate

(UTC-05:00) Eastern Time (US & Canada)

Download

Id	Title	Room	Type ▲	Date	Time	Account Code
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/20/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/21/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/22/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/23/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/24/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/25/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/26/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/27/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/28/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/29/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	9/30/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/1/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/2/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/3/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/4/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/5/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/6/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/7/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/8/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/9/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/10/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/11/2017	10:00 AM - 10:05 AM	-
30f0e314-40	admin's Conference	Virtual Room	Recurring	10/12/2017	10:00 AM - 10:05 AM	-
70b3e614-4	admin's Conference	Virtual Room	Single	9/22/2017	9:54 AM - 11:00 AM	-
25c3e614-3	admin's Conference	Virtual Room	Single	9/22/2017	2:40 PM - 4:00 PM	-
7f0ce614-aa	admin's Conference	Virtual Room	Single	9/22/2017	5:32 PM - 7:00 PM	-

This report lists conferences sorted by the schedule type of the conference (Single or Recurring). All conferences are listed by default. To filter the list to specific start and end dates, click the calendar icon next to the date fields above the detail lines. Then click **Generate** to apply the date parameters to the report. You can click column headings to sort columns. The columns are:

## ID

The identification number that Interaction Conference assigned to the conference.

## Title

The title of the conference, as it was configured on the [Settings tab](#).

## Room

The conference room assigned to the conference.

## Type

The schedule type of the Conference, which is either Single or Recurring. *Single* indicates a conference that happens once. *Recurring* indicates a conference that recurs automatically at a specified interval.

## Date

The date when each conference occurred.

## Time

The time when each conference occurred.

## Account Code

The billing code assigned to the conference, if any.

## Site Resources

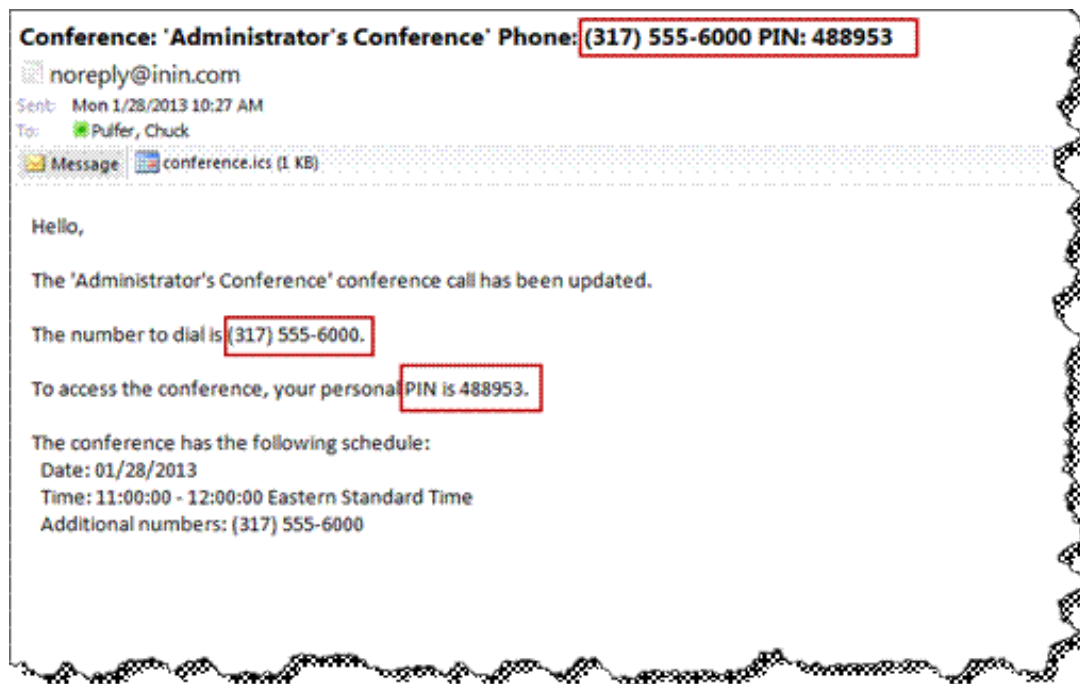
The **Site Resources** view displays a histogram of conference resource usage. To access this page, click the **Site Resources** hyperlink at the top of the page. This feature graphs conference resource utilization for the current date by default. To update the graph for a different date, click the calendar icon and change the date selection. Then click the **Redraw** button to update the display.

## Log out of the web application

Click the **Log off** link in the upper right corner of the web application. The **Logon** page reappears and you can log on as another user or close the web browser.

## Call a conference

Once a conference has been scheduled, invitees receive an email message that provides the information they require to join the conference, such as the number to dial, the PIN number, and the date and time. Here is an example:



### To call a conference:

1. Wait for the conference to start. If an invitee calls 5 minutes or less before the start time, the call is placed on hold until the conference starts. This *grace period* feature accommodates invitees who want to be present at the exact conference start. If an invitee calls earlier than 5 minutes before the conference starts, the call is disconnected and the invitee must call back.
2. Dial the number that corresponds to the conference. You hear the prompt:

Welcome to Interaction Conference. Please enter your PIN.

3. Type the PIN number referenced in the email message. If you do not enter a PIN or enter an invalid PIN, you hear:

Your PIN is invalid or your conference has not yet started. Please enter your PIN.

When a valid PIN is entered, one of two messages is played to the caller, advising that:

- The call was placed in the five-minute grace period before the conference. The attendee is placed on hold until the conference begins.
- The caller has now joined the conference.

## **Exit a conference**

No special procedure is required to exit a conference. Once a call to the conference has been established, an attendee can hang up at any time.

# Glossary

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## Attendees

Attendees are Conference participants. They originate from Invitees which originate from Contacts.

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## Billing Codes (Account Codes)

Billing codes provide an additional level of categorization of Conferences. They belong to Workgroups.

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## Conferences

A Conference is what ties everything together for a multiple party telephone call. Conferences have schedules to handle recurring requests. Conferences have both definitions and occurrences. A definition defines the attributes of the Conference whereas an occurrence is the actual occurrence of a Conference.

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## Contacts

Contacts are people that can be added to a Conference as an Attendee.

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## Grace Period

The time that occurs 5 minutes before a conference begins. Invitees who call in during this grace period are placed on hold until the conference begins. When the conference starts, all callers are removed from hold.

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## Groups

Groups represent the workgroups that are used for categorization of Conferences and Billing Codes.

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## Invitees

Invitees are potential Conference participants. They originate from Contacts and are notified of Conferences with a PIN they use to access the system at the right time.

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## Rooms

Sites may have multiple phone lines to handle multiple Conferences. A Room provides the method for a Site to handle this requirement.

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## Sites

Sites are the locations of the telephony hardware. Resources are Site-based along with Conference Room and actual Conferences.

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## Users

Users represent the system administrators. They access Interaction Administrator and maintain the other entities. They create conferences via the Interaction Conference web application and perform other various tasks.

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## How do I know if I have a documented feature?

Here are some indications that the documented feature is not currently licensed or available in your version:

- The menu, menu item, or button that accesses the feature appears grayed-out.
- One or more options or fields in a dialog box appear grayed-out or do not appear at all.
- The feature is not selectable from a list of options.
- If you have questions about feature availability, contact your vendor regarding the feature set and licenses available in your version of this product.



# Change Log

Change Log Date	Changes Made
06-December-2012	Updated for Interaction Conference 4.0: Outlook 2010 plug-in support, announce number of attendees, iCalendar attachments, migration to Interaction Conference 4.0.
12-February-2013	Updated screen captures for user interface changes, replaced Outlook Plug-in installation instructions, updated the Schedule a Conference in Outlook instructions for Outlook 2010, and updated the Conference Options list and explanations all for the 4.0 release.
19-February-2013	Cleaned up terminology, grammar, style, etc., removed the Note on page 32 about callers pressing *6 to unmute themselves, and clarified the selection criteria Interaction Conference uses to decide which caller to mute when someone else is unmuted in a 20+ caller conference.
29-August-2014	Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to Interactive Intelligence Product Information site URLs, and copyright and trademark information.
11-April-2016	Updated copyright and trademark information. Updated Recordings topic under Using the Conference List Page section for IC-136348. Added note to step 6 in Schedule a Conference in Outlook procedure for ICONF-645. Updated 20 participant limit to 300 for audible conference participants for ICONF-827. Updated to include support for Microsoft Outlook 2013 for ICONF-667. Updated image for conference list page and added End an active conference topic for ICONF-797.
10-May-2016	Changed filenames to 20xx_Rx.msi format.
12-July-2016	Update note in step of Configure Basic information section under Schedule a new conference to indicate Host and Guests text boxes auto-complete by using first name, last name, "FirstName LastName", or "LastName, FirstName".
17-October-2016	Removed note about using *6 to mute/unmute lines from Call a conference topic.
24-October-2017	Rebranding. Updated terminology, screen captures, copyright page.
12-June-2018	Minor corrections throughout document.
26-June-2018	Updated to include Microsoft Outlook 2016.
03-March-2019	Updated change log to include correct date format.