IntellaConference

System Users

Overview

The **System Users** screen is specifically meant for creating web portal accounts for **Users** to access and manage IntellaConference functions. Similar to the core Intellasoft **Users** screen, you will have the options for adding individual users and the ability to manage their permissions within the IntellaConference web portal.

Adding a New System User

1) Navigate to the **System Users** screen

2) Click the **New User** button. The table below represents the available settings for creating a new **User**. The permission options will be covered in a later step. (* Indicates a required field)

Field	**Type**	**Description**
First Name*	Field	First name of User
Last Name*	Field	Last name of User
Email*	Field	Email address of the user (for logging in)
Phone Number	Phone Number #	User's phone number (direct line, cell phone, etc.)
Pin	Numerical	Always recommended; pin number to login into web portal

3) Once you have entered the required options, click the **Save New User** button. You will see a message stating **Changes Saved.**

> Note: The screenshot below is from a demo system so the full phone number and email have been blurred out for privacy reasons.

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4) Next, set the permissions for the **User** in question. The individual permissions are defined in the table below.

5) Once you have set the desired permission for a user click the button labeled **Save New User,** you will see a message stating **Changes Saved**, indicating the user has been successfully saved. If you need to edit a **User's** setting click on the entry from the editor to make changes accordingly.

Permission	**Description**
Web Enabled	Check for the user to have access to the web portal (this in the majority of cases should be checked).
Manager	Can only edit pre-existing conferences.
Admin	Access to all elements of the IntellaConference web portal such as creating contacts, creating and modifying conferences.
Access Users	Has access to the users screen and is able to make changes.
Create Recur	User has ability to create recurring conference bridges.

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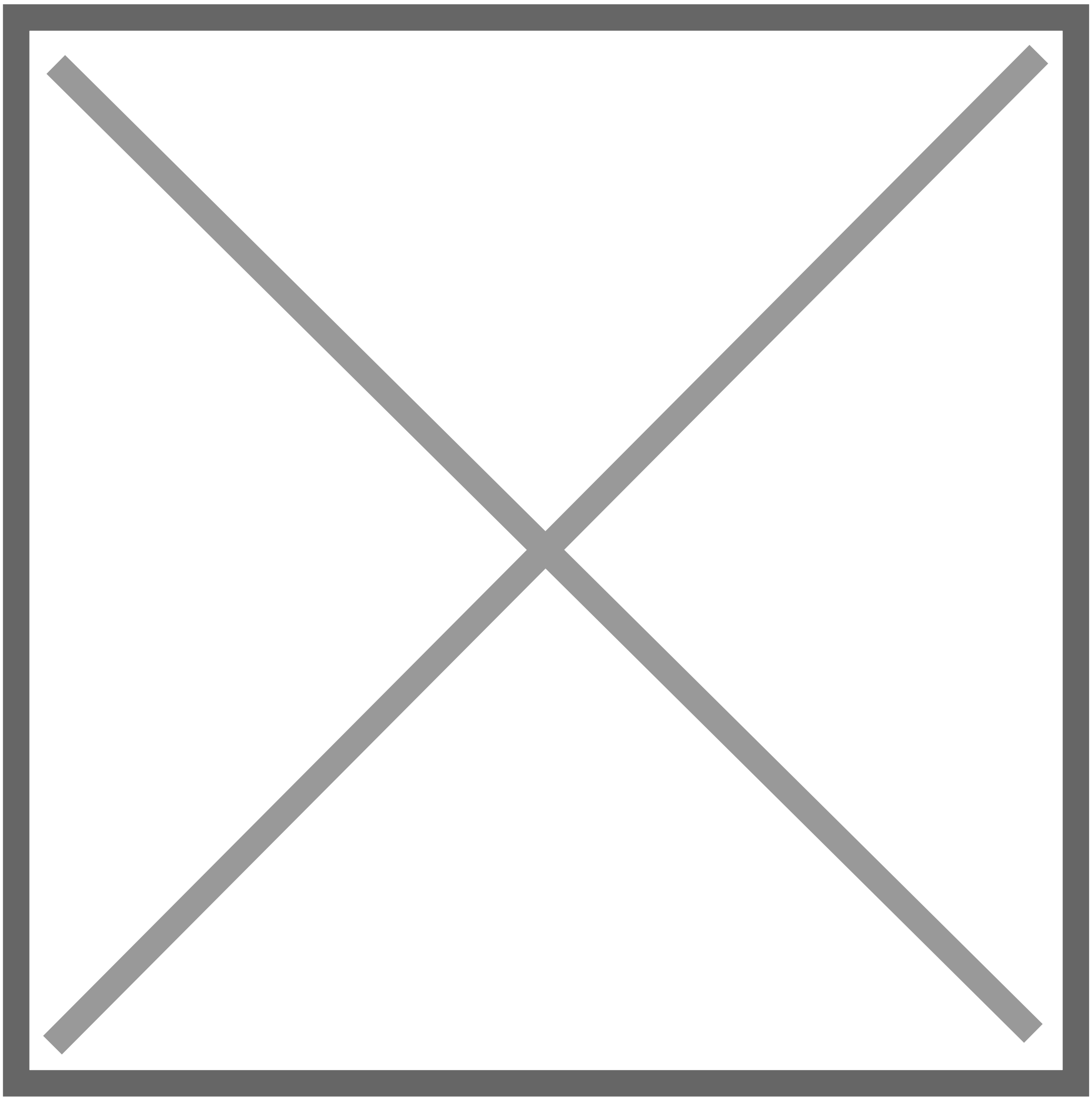
> Note: You must have the required settings entered to be able to save, additionally it should also be noted that each user must have their own unique PIN.

Removing a System User

To remove a web portal **User** click on the red **X** under the delete column corresponding to the **User** you wish to delete. A confirmation pop-up will appear confirming that this is the **User** you wish to delete, click **OK**. You will see a message stating **Changes Saved.**



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Personal Contacts

Overview

This section covers adding contacts that can be quickly added to new conference rooms. The personal contacts included are specific to the **User's** account that is logged into the web portal, so depending on the **User's** permission they may or may not be able to view or modify other people's contacts.

Adding a New Personal Contact

1) Start by navigating to the **Personal Contact** screen from the navigation panel.

2) Next, click the **New Contact** button and enter the information as defined in the table below.

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	Field	Type	Description
Required	First Name	Field	First name of Contact
	Last Name	Field	Last Name of Contact
	Email	Field	Email address of Contact (for notification)
Optional	Phone Number	Numerical Phone Number	Phone number of contact (as shown on their Caller ID)

3) Click the **Save New Contact** button. Afterwards, you will see a message stating **Changes Saved.**

Removing a Personal Contact

1) Click on the red **X** under the delete column corresponding to the **Personal Contact** you wish to delete.

2) A confirmation pop-up will appear confirming that this is the **Personal Contact** you wish to delete. Click **OK**. Afterwards, you will see a message stating **Changes Saved.**

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Company Directory

Overview

This section is about adding contacts that are accessible to everyone who has access to the IntellaConference web portal.

Adding a Company Directory Contact

1) Start by navigating to the **Company Directory** screen from the navigation panel.

2) Next, click the **New Contact** button and enter the information as defined in the table below.

	Field	Type	Description
Required	First Name	Field	First name of Contact
	Last Name	Field	Last Name of Contact
	Email	Field	Email address of Contact (for notification)
Optional	Phone Number	Numerical Phone Number	Phone number of contact (as shown on their Caller ID)

3) When you are satisfied with your selection save by clicking the **Save New Contact** button, afterwards you will see a message stating **Changes Saved.**

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Removing a Company Directory Contact

1) Find the contact that you wish to remove.

2) Click the red **X** under the delete column.

3) Click OK on the confirmation dialog to confirm the deletion.

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New Conference

Overview

This screen is dedicated to creating new conference bridges as well as managing the users who can join those conferences. It should be noted that this screen is not for editing pre-existing conferences, if you need to edit pre-existing conferences check out the Edit Conference page.

Creating a New Conference

1) Start by navigating to the **New Conference** screen,

2) Fill out the options (see the table below for more information)

3) If you are creating an **Open** conference (selected via the **Conference Type** option), you can press the **Create** button and you will see a message stating **Changes Saved**.

4) If you have selected the mode **Leader Mode, Lecture Mode,** or **Restricted or Private Mode,** then move on to the next step **Conference Participants**.

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Field	Type	Description
Conference Room	Numerical Field	Conference room number (this will be used later to access the conference).
Conference Name	Field	Descriptive name of the conference room.
Max Participants	Drop Down	Number of max participants that can join the conference.
Conference Type	Drop Down	Type of conference; private, restricted, or open.
Start Date	Calendar	Date that the conference will be active.
Start Time	Drop Down Time	Time the conference will be active (15-minute intervals, 12-hour clock).

Field	Type	Description
Buffer Time	Drop Down Time	Time that the conference will be available before the start time (5 or 10 minutes).
Duration	Drop Down Time	Time the conference will remain active (15-minute intervals).
Recurring	Drop Down	How often the conference will occur at the exact time.
Recurring End	Calendar	Date the recurring conference will end.
Lecture Mode	Checkbox	Only the leader is able to speak, other participants are muted.
Leader Required	Checkbox	If checked the leader must join for the conference to start, otherwise starts when the first participant joins.
Automute Mode	Checkbox	Participants are muted upon joining.
Auto Recording	Checkbox	Recording starts upon the second person joining.
Create	Button	Creates the conference assuming all requirements have been met.

Participant Management

Available Participants

This panel includes **Participants** that can potentially be added to the Conference in question, note that this panel is only useful if the conference in question has any of the following options selected;

- **Lecture Mode -** Only the leader of the conference can speak
- **Leader Required -** The leader must join to start the conference.
- **Restricted Conference Type -** Only included participants with a valid pin can join.
- **Private -** A user with any valid pin can join.

All of the previous options are configured here and in the **Included Participants** panel on the right (more information on this below). To add and manage **Participants** follow the options in the accordance to the table below. After you have added the desired **Participants** move on to the next section **Included Participants.**

Note

Names that are highlighted in blue are Contacts while those that are not highlighted are **System Users**, this is also shown as a Yes or No under the Contact column.

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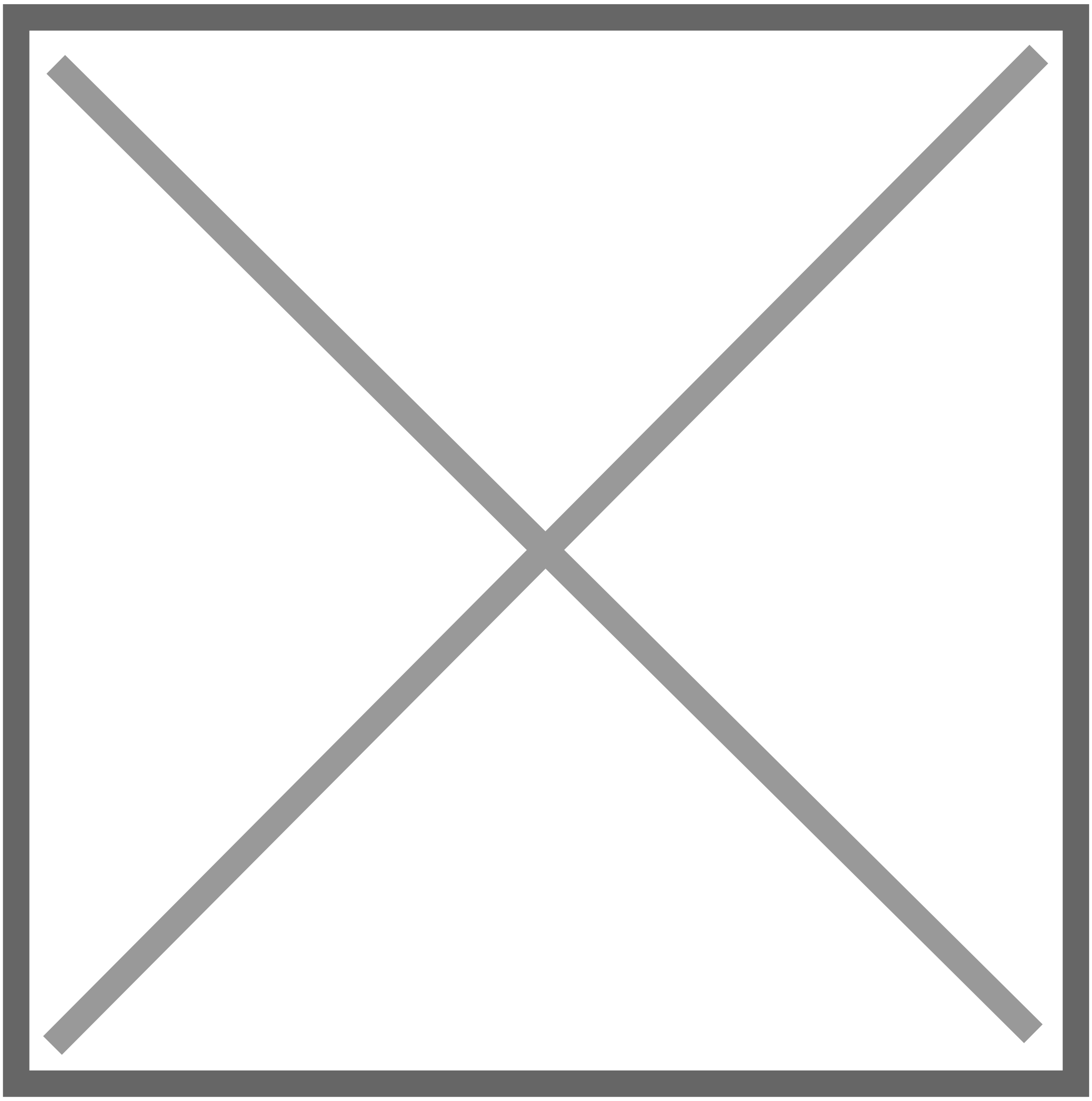

Item	Function	Type	Description
1	User Editor	Button	Jumps to the System Users screen.
2	Contact Editor	Button	Jumps to the ??? screen.
3	Quick Find	Search Field	Search Available Participants

4	Available participants	Value	Shows available contacts from personal contacts, corporate directory, and the System Users screen
5	Include	Button	Includes Available Contact

Included Participants

This panel includes Participants that have been included in the conference in question. As stated previously this is only effective if the conference has certain options set beforehand. In addition to the options included in the column there are also a few buttons that have specific functions as well, as explained below.

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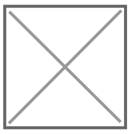
Function	**Type**	**Description**
Exclude	Button	Removes a Participant from Included to Available.
Name	Value	Name of the contact/user.
Contact	Value	Defines whether Participant is a contact or a user.
Leader	Checkbox	Defines whether or not Participant is a leader, **Required** for **Leader Mode** and **Lecture Mode.**
Moderator	Checbkox	Defines whether or not Participant has options for managing the conference call.
Notify	Checkbox	Defines whether or not Participants is to be notified when using Notification button.
Pin	Button/Pin	When press gives the participant a random Pin number for accessing the conference, after pressing the pin will be shown for future reference.

Notifying Participants

You are able to notify participants via email with meeting details as well their meeting pin. To setup a template for emailing participants check out the **Configuration** screen (coming soon). To notify all the of participants included in a conference click the **Notify All Participants Button,** alternatively if you wish to select a specific set up of participants , check the **Notify** box located in the **Notify** column. When you press either buttons a pop up message will appear stating how many participants have been notified.



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Create New Contact

You also have an option to create a new contact which will be added to the web portal. Press the **Create New Contact** button and fill out the information in the pop up accordingly. After you are finished press the **Save** button. The **Contact** will automatically be added as **an Included Contact** after saving.

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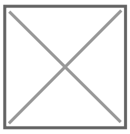

Edit Conference

Overview

This screen is dedicating to editing conference bridges as well as managing the users that can join said conferences. If you are looking to create a New Conference, check out the **New Conference** page.

Editing a Conference

Start by navigating to the **Edit Conference** screen, the table below corresponds with the option for creating a new conference. If you are creating an **Open** conference (this is selected via **Conference Type** option) than you can press the **Save** button, you will see a message stating **Changes Saved**. If you are have selected the conference to function in **Leader Mode, Lecture Mode,** or **Restricted or Private Mode** (selected again via **Conference Mode)**, move on to the next step **Conference Participants**.

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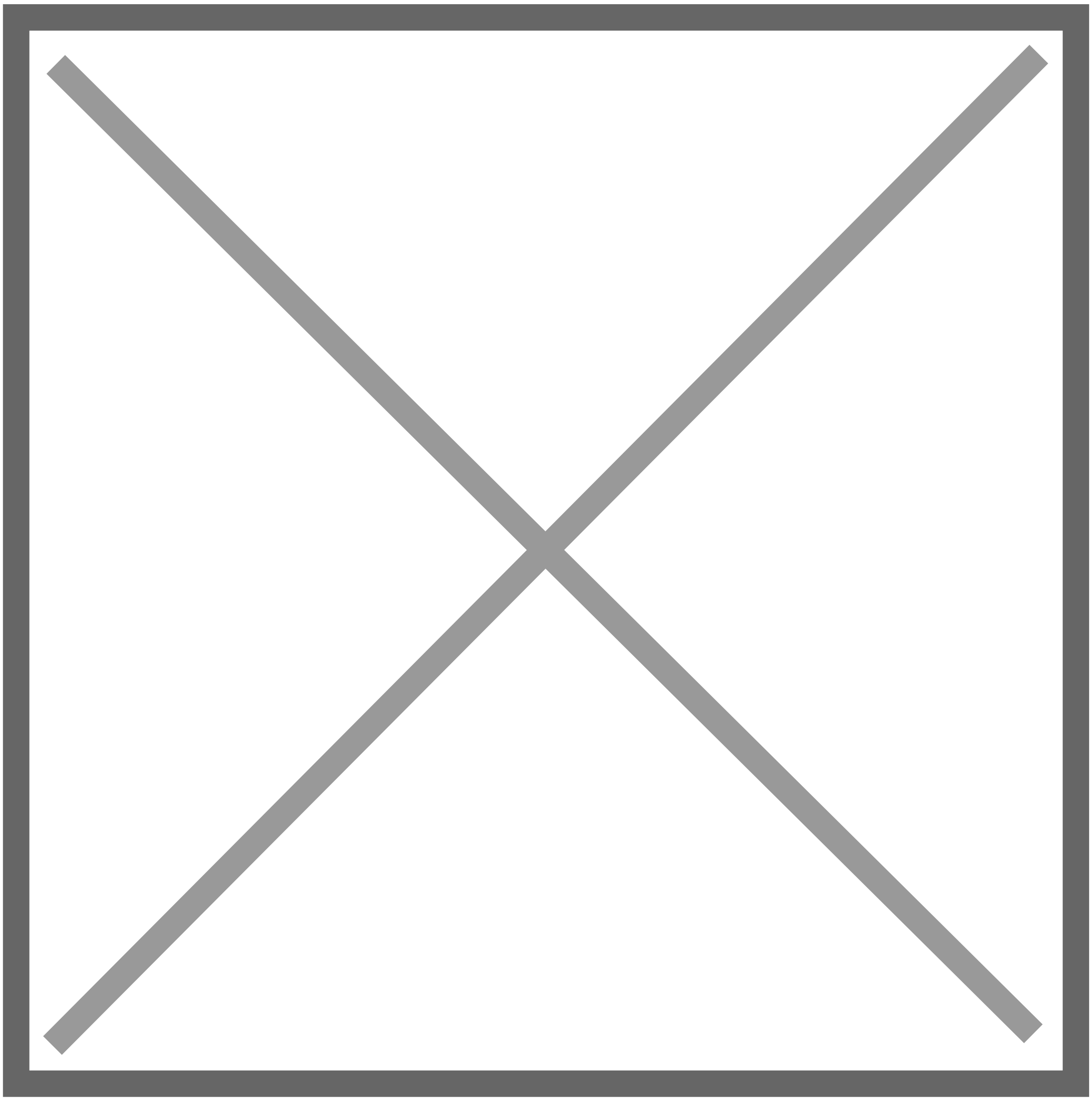

Field	Type	Description
Conference Room	Numerical Field	Conference room a number (this will be used later to access the conference).
Conference Name	Field	Descriptive name of the conference room.
Max Participants	Drop Down	Number of max participants that can join the conference.
Conference Type	Drop Down	Type of conference; private, restricted or open.
Start Date	Calendar	Date that the conference will be active.

Start Time	Drop Down Time	Time the conference will be active (15 minute intervals, 12 hour clock).
Buffer Time	Drop Down Time	Time that the conference will be available before the start time (5 or 10 minutes).
Duration	Drop Down Time	Time the conference will remain active (15 minute intervals).
Recurring	Drop Down	How often the conference will occur at the exact time.
Recurring End	Calendar	Date the recurring conference will end.
Lecture Mode	Checkbox	Only the leader is able to speak, other participants are muted.
Leader Required	Checkbox	If checked the leader must join for the conference start, otherwise starts when first participant joins.
Automute Mode	Checkbox	Participants are muted upon joining.
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Save	Button	Saves the conference assuming all requirements have been met.

Participant Management

Available Participants

This panel includes **Participants** that can potentially be added to the Conference in question, note that this panel is only useful if the conference in question has any of the following options selected;

- **Lecture Mode -** Only the leader of the conference can speak.
- **Leader Required -** The leader must join to start the conference.
- **Restricted Conference Type -** Only included participants with a valid pin can join.
- **Private -** User with any valid pin can join.

All of the previous options are configuring here and in the **Included Participants** panel on the right (more information on this below). To add and manage **Participants** follow the options in the accordance to the table below. After you have added the desired **Participants** move on to the next section **Included Participants.**

Note

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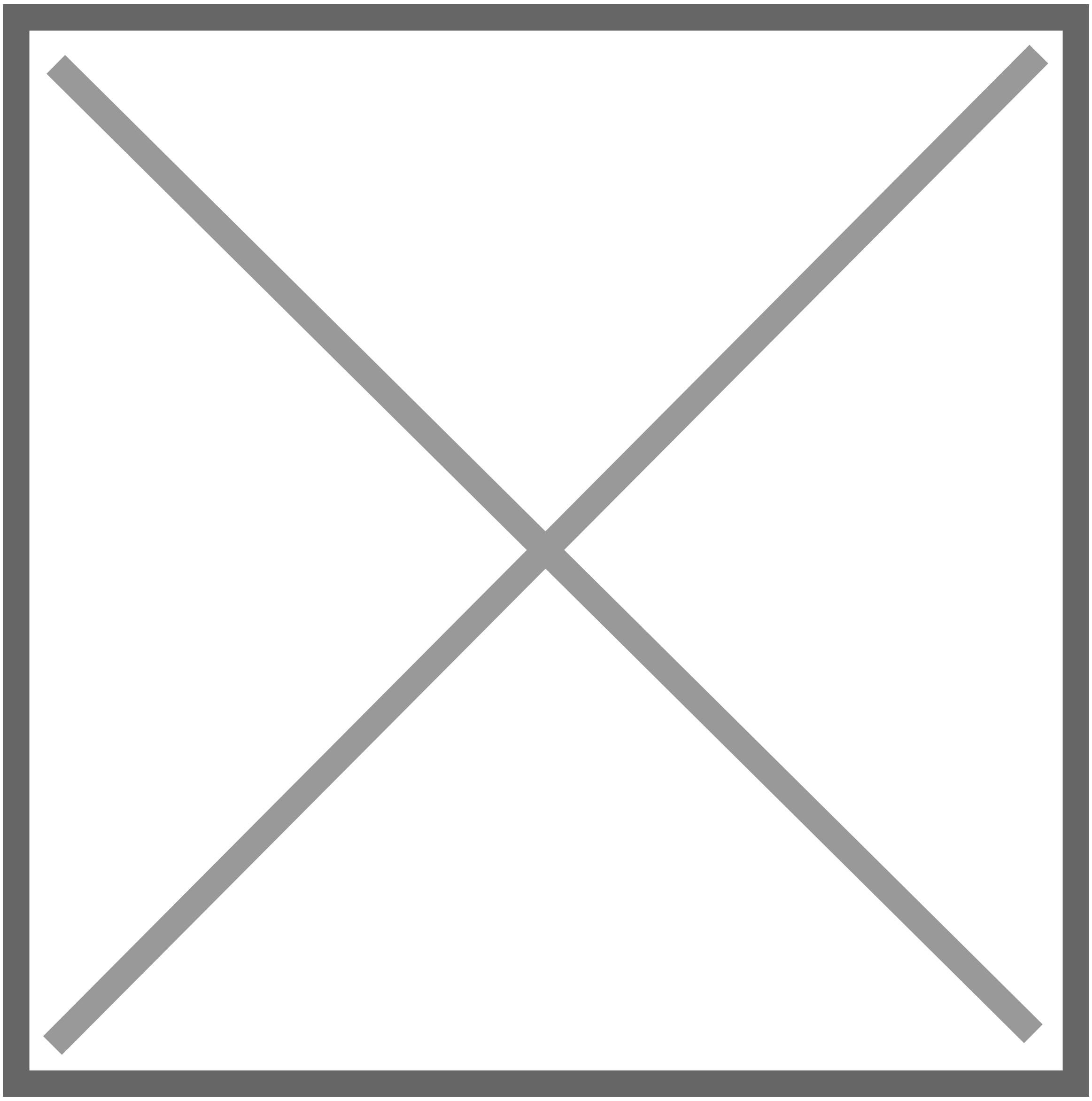

Item	**Function**	**Type**	**Description**
1	User Editor	Button	Jumps to the **System Users** screen.
2	Contact Editor	Button	Jumps to the **Personal Contacts** screen.

3	Quick Find	Search Field	Search Available Participants.
4	Available participants	Value	Shows **available** contacts from personal contacts, corporate directory, and the **System Users** screen.
5	Include	Button	Includes **Available Contact.**

Included Participants

This panel includes Participants that have been included in the conference in question. As stated previously this is only effective if the conference has certain options set beforehand. In addition to the options included in the column there are also a few buttons that have specific functions as well, as explained below.

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Exclude	Button	Removes a Participant from Included to Available.
Name	Value	Name of the contact/user.
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Notifying Participants

You are able to notify participants via email with meeting details as well their meeting pin. To setup a template for emailing participants check out the **Configuration** screen (coming soon). To notify all the of participants included in a conference click the **Notify All Participants Button,** alternatively if you wish to select a specific set up of participants, check the **Notify** box located in the **Notify** column. When you press either buttons a pop up message will appear stating how many participants have been notified.

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Create New Contact

You also have an option to create a new contact which will be added to the web portal. Press the **Create New Contact** button and fill out the information in the pop up accordingly. After you are finished press the **Save** button. The **Contact** will automatically be added as an **Included Contact** after saving.

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Conferences

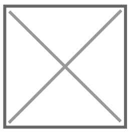
Overview

This screen is dedicated to viewing all of the conferences that have been created, as well as giving the option to delete any conferences that won't be utilized anymore.

Conferences

Field	Description
Start Time	Time the conference will become active
Name	Descriptive name of the conference room.
Duration	Time the conference will remain active (15 minute intervals).
Buffer	Time that the conference will be available before the start time (5 or 10 minutes).
Recurring	How often the conference will occur at the exact time.
Recur End	Date the recurring conference will end.
Conference Room	Conference room a number (this will be used later to access the conference).
Lecture	Only the leader is able to speak, other participants are muted.
Leader	Yes / No Leaders Mode
Recording	Yes / No Recording

Max Participants	Number of max participants that can join the conference.
Added By	User the conference was created by.
Controls	First Button takes you to edit Conference, Second Button Red X prompts to delete Conference



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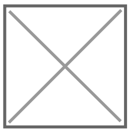
Deleting a Conference

To delete a conference click the red **X** for the corresponding conference you wish to delete which is located under the **Controls** column. A confirmation pop up will appear confirming that this is the selection you wish to delete.



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Conference Logs

Overview

This screen is dedicated to showing data gathered about previous **Conferences.** You are able to view such info such as when a conference began and ended, which participants joined, among other key pieces of data.

Conference Logs

The table below represents the data presented in the **Conference Logs** screen on the right. You also have the option to press the **+** button located on the far left side of each log entry to expand the log and view all the members who joined the conference.

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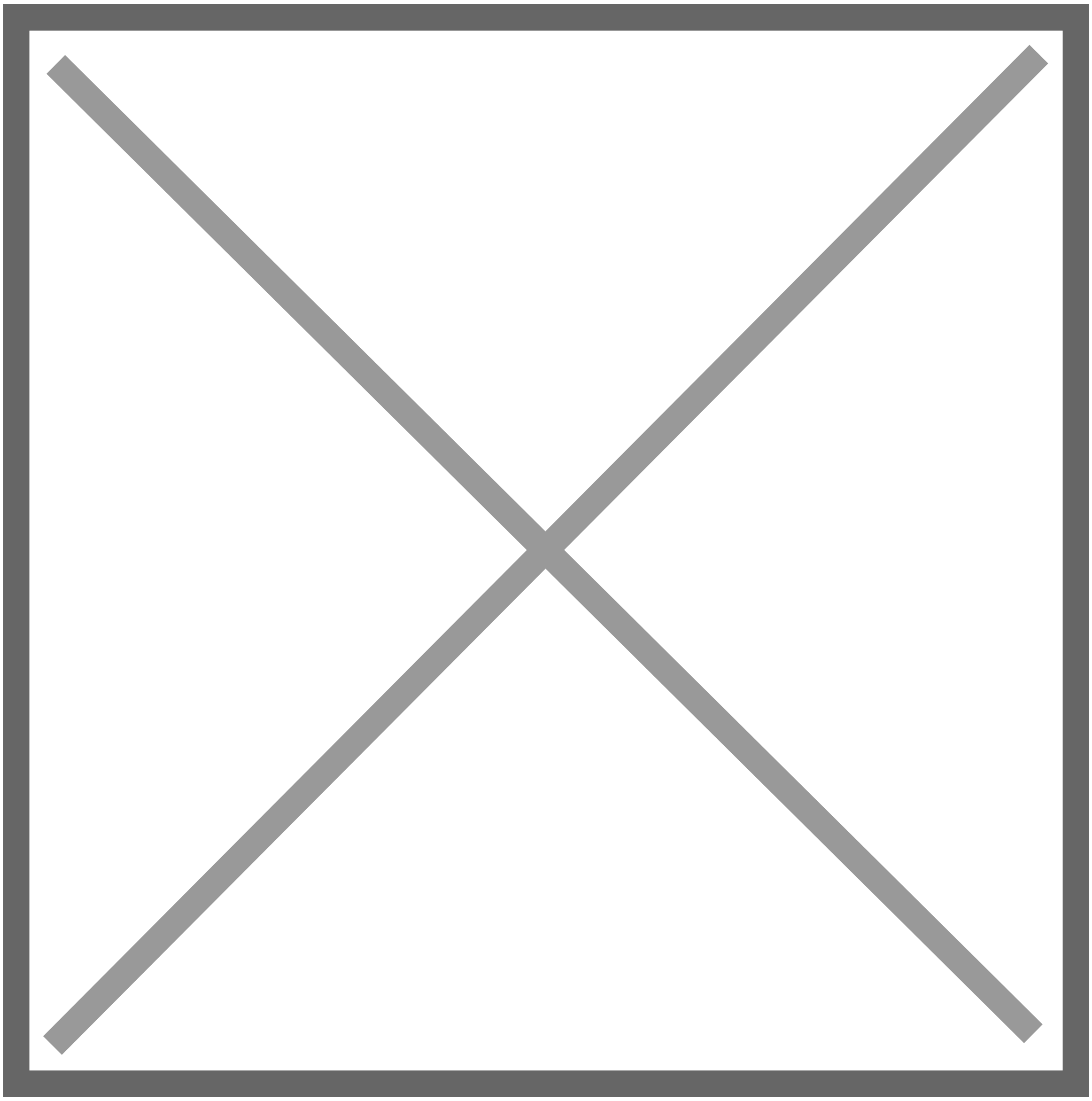

Overview

This section of the IntellaSoft documentation is specific to the IntellaConference conference bridge system. This is another optional product of IntellaSoft that allow advanced customization and configuring of conference bridges to allow multiple parties to connect to. This product helps bypass some of the limitations of the polycom that typically allow a limited number of lines connected in conference mode vs how many parties may need to actually connect. For example the IntellaConference currently allows up to 50 connections while being able to grant multiple parties leader and moderation privileges. There are two elements of the conference bridge, the web portal which allows for basic configuration of bridges, and the calls themselves, both which are covered in this documentation.

Logging In

To get started, navigate to the url provided to your organization for accessing the IntellaConference conference bridge, this will can be provided by your IntellaSoft representative or system administrator. The login screen is very similar to the IntellaSoft Core web portal, however you will login with your organization specific email as well as pin number, this information again can be provided by your system administrator. Once you have entered the information press the Login button, if you run into issues logging in please contact your system administrator for proper escalation. (Please bare in mind the picture on the right is an example, and the "Customer Logo" will usually be replaced with your organizations logo upon setup.)

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Quick Conference

You may have noticed that you have the option to make a conference with a few basic settings from the Welcome screen. Follow the steps below to setup the basic settings of the conference, bear in mind once you press the Create button you will be taken to the **Edit Conference** screen where you will able to further modify the advanced settings of a conference.

1	Start Date	Select a start date for the conference to be open from a calendar menu.
2	Max Participants	Sets the maximum number of parties that can connect to a conference (currently 50 is the maximum).
3	Duration	Duration the conference will be reserved for (open to join, and active).
4	Start Time	Sets the time that the confernece will be open (15 minute increments, 12 hour AM/PM format).
5	Conference Type	Sets the conference to Open (anyone can join), Private (only users have a pin can join), Restricted (users must have a pin and be added to conference contacts from the web portal).
6	Create	Finalizes the initial set of settings and will take you to **Edit Conference** screen for further options.

Tip

Hover over the **?** to get a contextual tip on what each function is used for, this also applicable for other screens as well.

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Active Conferences