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.

Field	Type	Description
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 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.
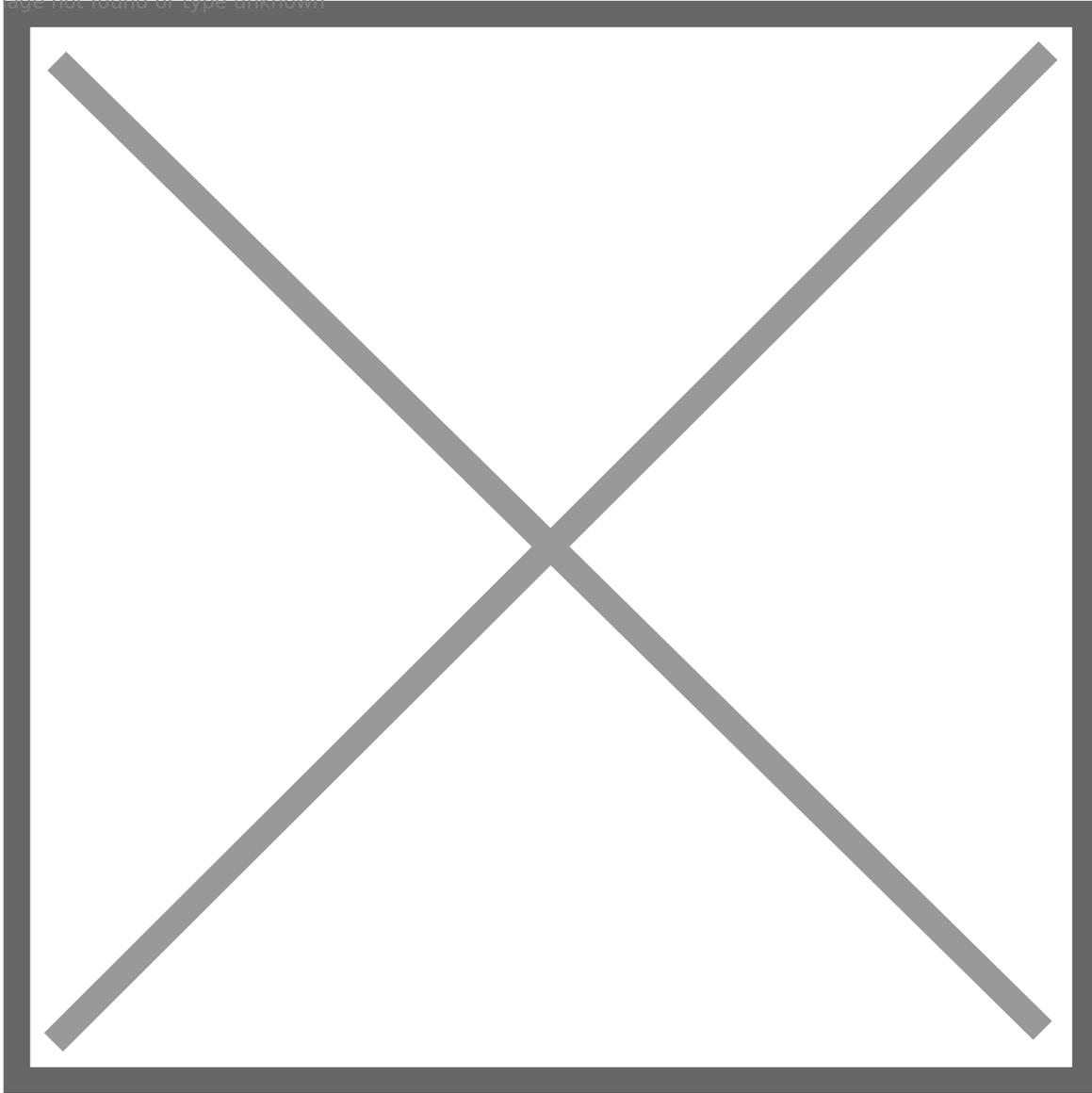
Item	Function	Type	Description
1	User Editor	Button	Jumps to the System Users screen.
2	Contact Editor	Button	Jumps to the ??? screen.

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.
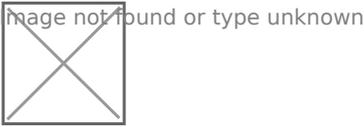

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Create New Contact

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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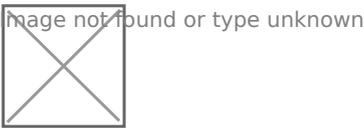
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