



# Operator's Guide

Software Version 11.0

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**Disclaimer:** This Operator's Guide is meant as a general guide to configuring and administering the conferencing system. Not every configuration or problem can be anticipated given the variations in all hardware and software products. Sonexis Technology, Inc. accepts no responsibility for errors or omissions contained in this Guide.

**Sonexis Technology, Inc.**

978-640-2000

[www.sonexis.com](http://www.sonexis.com)

[CustomerCare@sonexis.com](mailto:CustomerCare@sonexis.com)

**Headquarters:**

300 Seco Road  
Monroeville, PA 15146

**Technology Center:**

400 Network Drive  
Tewksbury, MA 01876

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# Chapter 1: Getting Started

ConferenceManager is an integrated, premises-based audio and web conferencing system designed to improve enterprise business processes and communications while significantly reducing conferencing costs. The ConferenceManager system is easy to use, maintains security of sensitive corporate information, requires low administrative overhead, and leverages existing network investments.

The *ConferenceManagerOperator's Guide* is primarily designed to help Operators manage multiple conferences and assist conference participants.

## A note about Classes of Service

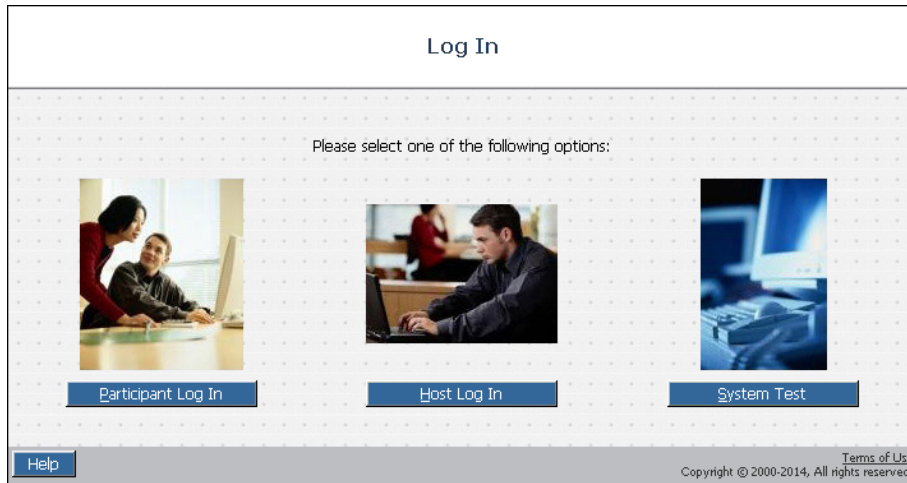
ConferenceManager accounts are assigned to a Class of Service (or CoS) that determines what they can and cannot do.

The following table identifies the Class of Service requirements that should be assigned to Operator and Host accounts in order to use the Operator Console effectively. Contact your administrator if you have questions.

Task	Class of Service Requirement
<b>Operator</b>	
<a href="#">Accessing the Operator Console</a>	Allow Operator Console
<a href="#">Answering help requests, initiating calls</a>	Allow Dial Out
<b>Host</b>	
<a href="#">Requesting Assistance (enables the host and participants to dial *00)</a>	Allow *00
<a href="#">Blast Dialing (Operator-initiated)</a>	Allow Blast Dial
<a href="#">Creating Ad-hoc conferences (Operator-initiated)</a>	Allow Ad-hoc

## Logging In to ConferenceManager

You access the ConferenceManager Log In page by navigating to the conferencing system URL provided by your administrator.



The Log In page provides access to the Participant Log In page, Host Log In page, and System Test utility:

- Participants log in to the conferencing system to join web conferences; they need a Conference ID and sometimes a PIN or password if the host requires it.
- Hosts log in to schedule and manage conferences and their account information; they need a Conference ID and PIN to log in.  
Operators and Conference/Tenant Administrators also log in as hosts.
- All new users should run the system test to verify and optimize compatibility with the conferencing system.

## Logging in as an Operator

You can log into ConferenceManager as an Operator if you already have a host account and the System Administrator has enabled the Operator Console for your account. If you do not have an account, your administrator or delegate can create one for you.

To log in:

- Step 1.** From the Log In page, click **Host Log In**.

The Host Log In page appears.

If you have an account but have forgotten the login information, click **Forgot your conference ID or PIN?** and see "[Retrieving Login Information](#)" on the next page.

- Step 2.** Enter your **Conference ID** and **PIN**.

Your Conference ID is 4-12 characters; your PIN is 4-8 characters. The administrator has options to set a minimum PIN length, and to require that you cannot use your Conference ID as your PIN.

To save your ID on your computer, select **Remember my Conference ID**.

- Step 3.** Click **Log In**.

The My Conferences page appears.

- Step 4.** Click **Operator Console**.

The Operator Console opens; see "[About the Operator Console](#)" on page 7 for an introduction.

## Changing Your PIN Upon Login

There are a few general cases where you may be required to change your PIN upon login:

- If your account is new, your administrator may require you to change your PIN when you first log in.
- If the administrator changes the conferencing system settings such that your PIN is no longer valid (e.g., it is too short, or it is identical to your Conference ID), you must change your PIN to meet the new requirements.
- If your administrator has set PINs to expire after a given period of time, you will receive a warning prior to the PIN expiration. You may change it when prompted or click **Change Later** until the expiration date arrives.
- If your Class of Service dictates that your host PIN and participant PIN must match, and your host PIN is already in use as a participant PIN.

When prompted, enter your **Existing PIN** and the **New PIN** twice, and click **Enter**.

The image displays two screenshots of a PIN change interface. The left screenshot shows a message box stating "Your PIN will expire in 4 days. You may change your PIN or press 'Change later' to change it later." Below the message are three input fields labeled "Existing PIN:", "New PIN:", and "Confirm New PIN:". At the bottom of the form are two buttons: "Enter" and "Change Later". The right screenshot shows the title "Change PIN for Host ID: 0000" and the same three input fields. Below the input fields is a single "Enter" button.

## Retrieving Login Information

If you forget a Conference ID or PIN, the conferencing system can send them to you.

To retrieve your login information:

- Step 1.** From the **Host Log In** page, click **Forgot your Conference ID or PIN?**  
The Forgot Log In Information window appears.
- Step 2.** Enter the **Email Address** associated with your account and click **OK**.  
The conferencing system emails your Conference ID and PIN to you.



## Getting Help

The **Help** tab, available on every screen, provides access to context-sensitive online help and to the complete ConferenceManager documentation set in PDF format.




To access online help, click the **Help** tab on any administrator page.

To access documentation in PDF format, select any of the following documents from the Online Help's Table of Contents:

- The *Operator's Guide* describes how to manage conferences and assist conference participants.
- The *User's Guide* describes how to host, lead, or participate in conferences.

## Contacting Customer Care

You can reach Sonexis Customer Care by phone at 866.676.6394 Monday - Friday, 8am to 8pm EST, or by email at [CustomerCare@sonexis.com](mailto:CustomerCare@sonexis.com).

-  SonexisSupport
-  SonexisSupport
-  @SonexisSupport

If Customer Care requests a trace log of the Operator Console, click  from the [Operator Console](#) panel.



# Chapter 2: About the Operator Console

The Operator Console is designed to provide designated users with administrative control over all activity on the conferencing system.


The Operator Console has three main sections:

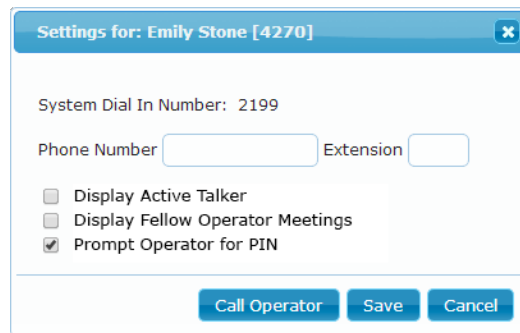



Area	Description	See
Operator Conference	The central area from which the Operator monitors conferences, dials out to participants, and answers help requests.	<ul style="list-style-type: none"> <li>■ "About the Operator Conference" on page 13</li> <li>■ "Connecting to the Operator Conference" on page 15</li> <li>■ "Dialing Out from the Operator Conference" on page 16</li> <li>■ "Answering Help Requests" on page 18</li> </ul>
Conference Tabs	Lists of live conferences and upcoming scheduled conferences that may be viewed, and a means of creating new ad-hoc conferences.	<ul style="list-style-type: none"> <li>■ "Monitoring Live Conferences" on page 10</li> <li>■ "Viewing Scheduled Conferences" on page 11</li> <li>■ "Creating Ad-Hoc Conferences" on page 12</li> </ul>

Area	Description	See
Conference Views	Each Conference View represents a conference room, whether started or not. There are many ways to interact with live conferences and conference participants.	<ul style="list-style-type: none"><li data-bbox="1081 268 1466 331">■ "About the Conference View" on page 19</li><li data-bbox="1081 348 1466 443">■ "Dialing Out from a Conference View" on page 21</li><li data-bbox="1081 464 1466 527">■ "Conferencing with Participants" on page 22</li></ul>

## Configuring the Operator Console

From the Operator Conference panel, click  to display the Settings window, which is described in the table below.



Item	Description
System Dial In Number	The conferencing system's dial in number as configured by the System Administrator.
Phone Number/Extension	The phone number at which the conferencing system should dial the Operator to start an Operator Conference.
Display Active Talker	When selected, highlights the current speaker in each conference being monitored. The System Administrator must enable Active Talker.
Display Fellow Operator Meetings	When selected, the <a href="#">Live Conferences tab</a> displays Operator Conferences in addition to hosted conferences.
Prompt Operator for PIN	When selected, the Operator must enter their PIN upon answering, before being connected to the Operator Conference.
Call Operator	Places a call to the Operator at the number configured here. Once the Phone Number is configured, you can click  from the console to be brought into the Operator Conference.
Save	Saves any changes and closes the Settings popup.

## Monitoring Live Conferences

The Live Conferences tab lists active conferences on the system.

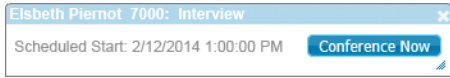
Live Conferences										Scheduled Conferences		Create Ad-Hoc		Help	
Display	Host Name	Conf ID	Subject	Start Time	Scheduled End Time	Audio(Sched)	Audio(Actual)	Web(Sched)	Web(Actual)						
<input type="checkbox"/>	Emily Stone	4270	Weekly Status	2/12/2014 11:00:00 AM	2/12/2014 11:30:00 AM	8	7	8	6						
<input checked="" type="checkbox"/>	Camden Haase	3333	Sales Demo	2/12/2014 09:58:19 AM	2/12/2014 12:00:00 PM	3	3	3	3						
<input type="checkbox"/>	Elsbeth Piemot	7000	Interview	2/12/2014 10:46:03 AM	2/12/2014 11:15:00 AM	2	2	0	0						

Column	Description
Display	Select a <b>Display</b> checkbox to show its conference panel in the <a href="#">Conference View</a> area; see " <a href="#">About the Conference View</a> " on page 19 for details.
Host Name	The conference host (either the user who scheduled the conference, or the user a delegate scheduled the conference for)
Conf ID	The host's Conference ID.
Subject	The name specified when the conference was scheduled ( <i>Host_Name's</i> Conference by default).
Start Time	The time at which the conference actually started.
Scheduled End Time	The time at which the conference is scheduled to end.
Audio (Sched)	The number of audio ports reserved for the conference.
Audio (Actual)	The number of audio ports currently in use.
Web (Sched)	The number of web ports reserved for the conference.
Web (Actual)	The number of web ports currently in use.

## Viewing Scheduled Conferences

The Scheduled Conferences tab displays upcoming conferences for the current day.

Live Conferences		Scheduled Conferences					Create Ad-Hoc		Help	
Display	Host Name	Conf ID	Subject	Scheduled Start Time	Scheduled End Time	Recurs	Audio	Web		
<input checked="" type="checkbox"/>	Elsbeth Piernot	7000	Interview	2/12/2014 01:00:00 PM	2/12/2014 01:30:00 AM	No	2	2		
<input type="checkbox"/>	Catherine Haase	1963	Dev Status	2/12/2014 02:00:00 PM	2/12/2014 03:00:00 PM	Yes	8	8		
<input type="checkbox"/>	Elsbeth Piernot	7000	Interview	2/12/2014 04:30:00 PM	2/12/2014 05:00:00 PM	No	2	2		

Column	Description
Display	<p>Select a <b>Display</b> checkbox to show its conference panel in the <a href="#">Conference View</a> area. The Conference View displays the scheduled start time; click <b>Conference Now</b> to start the conference, after which you may dial out to invitees as described in "<a href="#">Dialing Out from a Conference View</a>" on page 21.</p> 
Host Name	The conference host (either the user who scheduled the conference, or the user a delegate scheduled the conference for).
Conf ID	The host's Conference ID.
Subject	The name specified when the conference was scheduled ( <i>Host_Name</i> 's Conference by default).
Scheduled Start Time	The time at which the conference is scheduled to start.
Scheduled End Time	The time at which the conference is scheduled to end.
Recurs	Whether the conference is part of a recurring series.
Audio	The number of audio ports reserved for the conference.
Web	The number of web ports reserved for the conference.

## Creating Ad-Hoc Conferences

The Create Ad-Hoc tab allows you to start ad-hoc conferences on behalf of a host, if the host's Class of Service allows it.

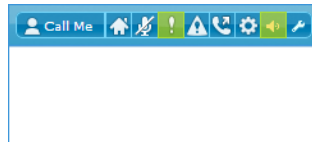
Display	Conf ID	Host Name	Allow Ad-hoc?	Password?
<input checked="" type="checkbox"/>	3333	Camden Haase	Yes	Yes
<input type="checkbox"/>	7777	Catherine Haase	Yes	Yes
<input checked="" type="checkbox"/>	8888	Michael Hamilton	Yes	Missing
<input type="checkbox"/>	2222	Jessica Harp	No	No
<input type="checkbox"/>	1010	Elice Maxwell	No	No















Column	Description
[Search]	Enter a host's Conference ID or part of their last name and click <b>Search</b> to display a list of matching hosts.
Display	Select a <b>Display</b> checkbox to show its conference panel in the <a href="#">Conference View</a> area. The Conference View contains only a <b>Conference Now</b> button; click it to start the conference, after which you may dial out to invitees as described in " <a href="#">Dialing Out from a Conference View</a> " on page 21. <div style="text-align: center; margin: 10px 0;"> </div>
Conf ID	The host's Conference ID.
Host Name	The host's name.
Allow Ad-hoc?	Indicates whether the host is allowed to create an ad-hoc conference. If <b>Yes</b> , then the Operator can start the ad-hoc conference for the host; if <b>Host</b> , then only the host can initiate the conference.
Password?	Indicates whether the host (or host's class of service) requires a password: <ul style="list-style-type: none"> <li>■ Yes: A password is required, and it has been configured.</li> <li>■ Missing: A password is required, but the host has not configured it in their My Account settings; the Operator cannot create the ad-hoc conference.</li> <li>■ No: A password is not required.</li> </ul>







# Chapter 3: About the Operator Conference

The upper-left section of the Operator Console is the Operator Conference panel, which contains the following controls.



Item	Description	Also See
 Call Me	Dials out to you from the Operator Conference, provided your number is configured in the <a href="#">Settings window</a> .	"Connecting to the Operator Conference" on page 15
 Return to Operator Conference	Disconnects you from a conference or private call, if connected, and returns you to the Operator Conference (  when active).	—
 Mute Operator	Mutes your voice (  when active). Mute is activated automatically when you <a href="#">join a conference</a> .	—
 Incoming Connection Help Requests	Displays a list of help requests from participants who have dialed in to the system and pressed *00. Appears green (  ) when selected if there are no requests; when there are active unanswered requests, a tone sounds and the button turns red (  )	"Answering Help Requests" on page 18
 Conference Participant Help Requests	Displays a list of help requests from current conference participants who have pressed *00. Appears green (  ) when selected if there are no requests; when there are active unanswered requests, a tone sounds and the button turns red (  )	"Answering Help Requests" on page 18
 New Dialout	Allows you to dial out to a new participant and bring them into the Operator Conference (changes to  when active).	"Dialing Out from the Operator Conference" on page 16
 Settings	Displays the Operator Console <a href="#">Settings window</a> .	"Configuring the Operator Console" on page 9

Item	Description	Also See
	Sound	Indicates whether the alert sound for help requests is on (  ) or off (  ).
	Trace	Displays a trace log that <a href="#">Customer Care</a> may use when troubleshooting issues.  <a href="#">"Contacting Customer Care" on page 5</a>





## Connecting to the Operator Conference


You must connect to the Operator Conference before you can answer help requests, start new dialouts, or join conferences.

**Step 1.** If you have not yet configured the console [Settings](#) then click , enter the **Phone Number**, and click **Save**.

You can also click **Call Operator** from within the Settings window after entering the Phone Number.

**Step 2.** Click .


The  button reflects the call status from , to , and finally to . You may need to enter your PIN before being connected, depending upon the [console settings](#).

To disconnect from the Operator Conference, click  and then click **OK** to confirm.

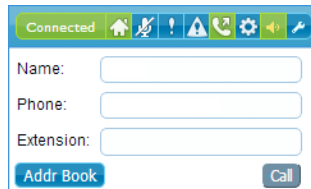
## Dialing Out from the Operator Conference

You must be connected to the Operator Conference before you can dial out (see "Connecting to the Operator Conference" on the previous page).

To dial out:

Step 1. Click .

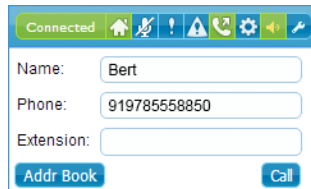
The Name/Phone/Extension fields appear.



A screenshot of a dial out form. At the top, there is a status bar with the word "Connected" and several icons. Below this, there are three input fields: "Name:", "Phone:", and "Extension:". At the bottom of the form, there are two buttons: "Addr Book" and "Call".

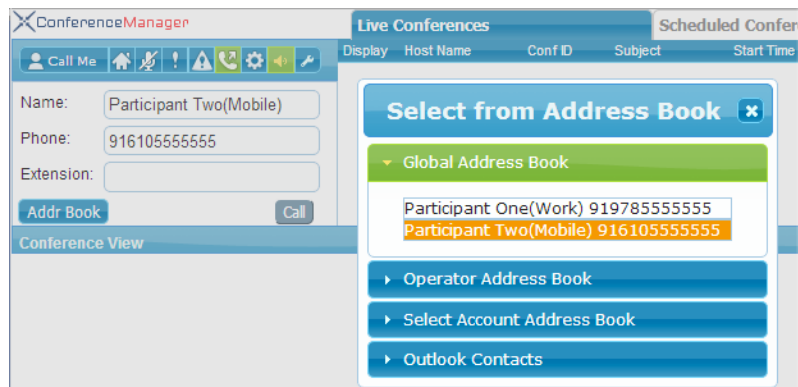
Step 2. Supply the dialout information.

- Either enter the dialout information manually,



A screenshot of the dial out form with manual input. The "Name:" field contains "Bert", the "Phone:" field contains "919785558850", and the "Extension:" field is empty. The "Addr Book" and "Call" buttons are visible at the bottom.

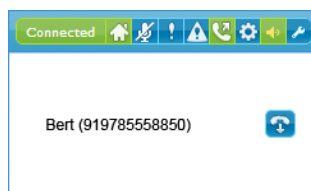
- Or click **Addr Book** to select a contact from the Address Book




A screenshot of the "Select from Address Book" dialog box. The dialog is open over the dial out form. It shows a list of contacts under the heading "Global Address Book". Two contacts are listed: "Participant One(Work) 91978555555" and "Participant Two(Mobile) 91610555555". Below the list are four buttons: "Operator Address Book", "Select Account Address Book", and "Outlook Contacts".

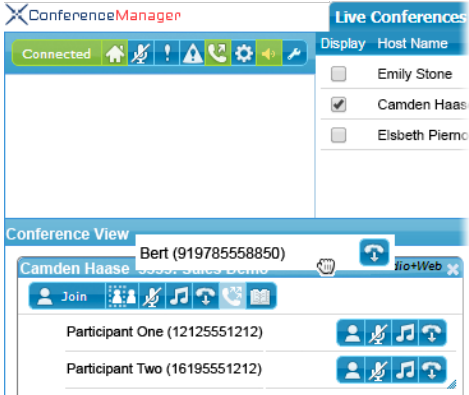
Step 3. Click **Call**.

Once the call is answered, the contact is brought into the Operator Conference.








A screenshot of the dial out form showing the result of a successful call. The "Name:" field now contains "Bert (919785558850)" and there is a small blue icon to the right of the text. The "Phone:" and "Extension:" fields are empty. The "Addr Book" and "Call" buttons are still visible at the bottom.

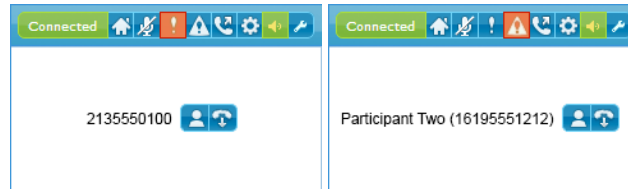
You can subsequently click  to hang up, or drag the contact into an existing conference.





## Answering Help Requests

Help requests can be initiated by dialing \*00, either while dialing in to the conference system or from within a conference. Those requests can be viewed by clicking  or  respectively.

When a help request is received, a tone sounds (as long as sound is enabled ); click  or  as appropriate to view those requests.

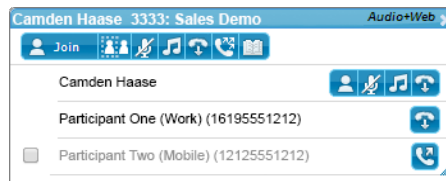


Click  to connect to the caller (you must be [connected to the Operator Conference](#)). After assisting them you can drag them back into the conference, or click  to disconnect them.

As long as there are extra ports available, Operator can add participants to a conference even if the number of reserved ports are already in use. If the hosts Class of Service limits audio ports, however, then the Operator cannot pass that limit.

# Chapter 4: About the Conference View













You may display live conferences (Conference View) by selecting their Display checkbox on the [Live Conferences](#) tab.



The controls at the top of the Conference View panel apply to the whole conference:

Item	Description
Join	Places you into the conference (provided you are connected to the Operator Conference) with your audio muted (). The button changes to <b>Joined</b> when connected. To leave the conference, click <b>Joined</b> or  to return to the Operator Conference. The host also has the option to lock the conference () , in which case you are unable to join it.
Private	Creates a new private conference, into which you can drag participants.
Mute All	Mutes all conference participants, except for the host; changes to  when active.
Hold All	Places all conference participants on hold, except for the host; changes to  when active.
Disconnect All	Disconnects all conference participants, including the host; changes to  while lines are being disconnected. Disconnecting all participants does not necessarily end the conference, as the host's preferences may allow it to continue.
Blast Dial	If there are selected, unconnected contacts listed (see <a href="#">"Dialing Out from a Conference View" on page 21</a> ), initiates a blast dial. Icon appears as  if Blast Dial is not enabled for the host's Class of Service.
Address Book	Displays a selection list (Invitees, Host's Address Book, Global Address Book). (see <a href="#">"Dialing Out from a Conference View" on page 21</a> )

Individual, connected participants are displayed in black text with the first four buttons available from the table below. Participants in the process of joining are displayed in black text with only available. Names in gray are not part of the conference until dialed ()

Item	Description
 Connect to Party	Places you into a private conference with the participant, providing you are dialed into the Operator Conference; changes to  when connected. Click  to exit the private conference and join the main conference, or  to return to the Operator Conference.
 Mute	Mutes an individual participant; changes to  when active.
 Hold	Places an individual participant on hold; changes to  when active.
 Disconnect	Disconnects an individual participant; changes to  while the line is being disconnected. This is the only option available while a contact is connected to the conferencing system but has not yet been placed into the conference.
 Dial	Dials out to an unconnected contact who is listed in the conference panel (if showing contacts from the Address Book, for example). Changes to  while the call is being placed.

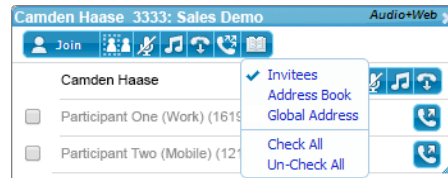


## Dialing Out from a Conference View


The Operator can assist conference hosts when necessary by dialing out to the conference participants.


**Step 1.** Click  to add the conference invitee names to the conference.

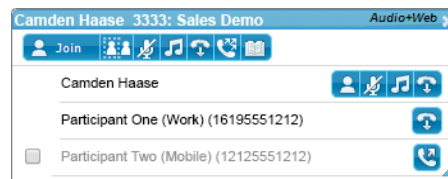
You may also view/select contacts from the host's and Global address books.




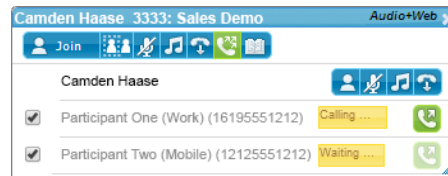
**Step 2.** Dial contacts individually or via Blast Dial.

- To dial an individual contact, click .

Once the contact answers, their name becomes active and only the  icon is displayed while the participant joins the call.






- If Blast Dial is enabled by the host's Class of Service, select one or more contacts and click .



## Conferencing with Participants

Once [connected to the Operator Conference](#), you may join ongoing conferences or conference in private with conference participants.



To join a conference:



- Click  at the top of any displayed conference; the button changes to  when connected, and your audio is muted ().

If the conference is not visible, select its **Display** box from the [Live Conferences tab](#).

To leave the conference, click  or  to return to the Operator Conference.

To connect to a conference participant:

- Click  next to the participant's name; the button changes to  when connected.

Click  to exit the private conference and join the main conference, or  to return to the Operator Conference.

If the host locks the conference, the  button becomes , and you cannot join it. You may still click  to conference with an individual participant.

