



UC Web Client Conferencing Creator

UC Web Client Training Series

In the UC Web Client, you can create conference lines to host group calls. There are three conference types:

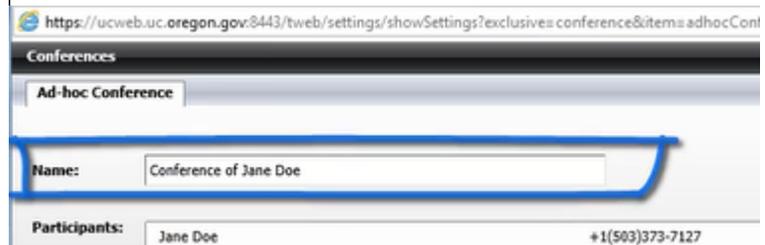
- Ad-hoc conferences, which are impromptu conferences that require very little setup;
- Persistent Conference lines, which stay open and available, and use an access PIN that can be shared with other users.
- And Scheduled Conferences, which are set up in advance and require you to set a date and time.

Ad-Hoc Conferences

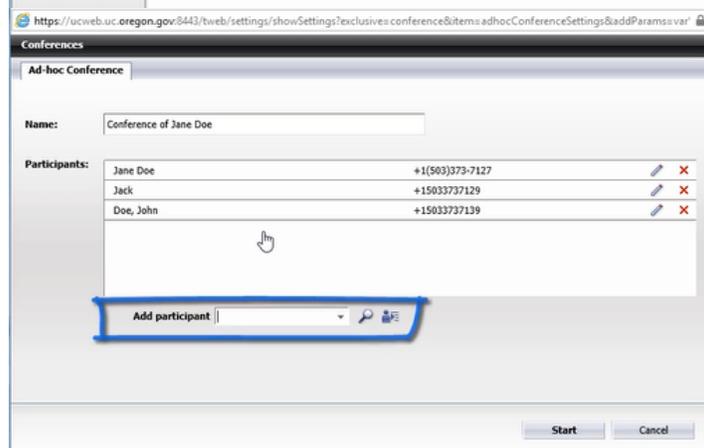
To set up an Ad-hoc conference; click the green "Make Conference" icon



Name your conference



Add participants



Click Start.

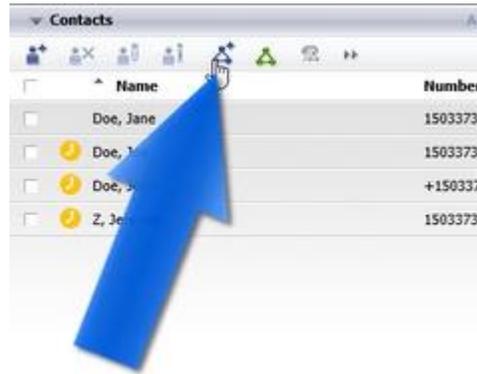


The line calls participants and connects them if they pick up - no pin is required.

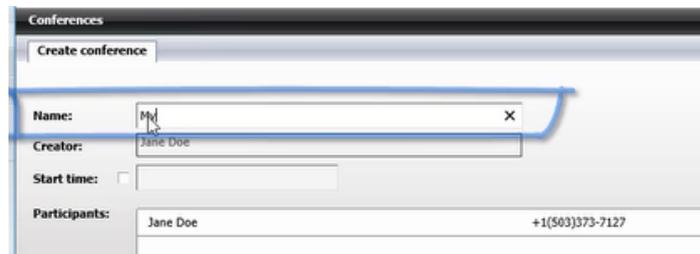


Persistent and Scheduled Conferences

To set up a Persistent Conference line or a Scheduled Conference click the blue "Create Conference" icon.



First input a name for your conference.

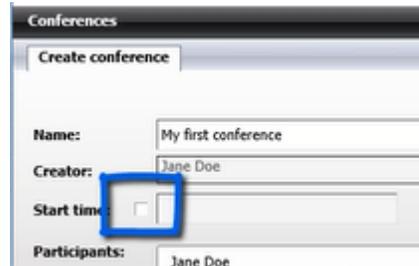




Persistent Conferences

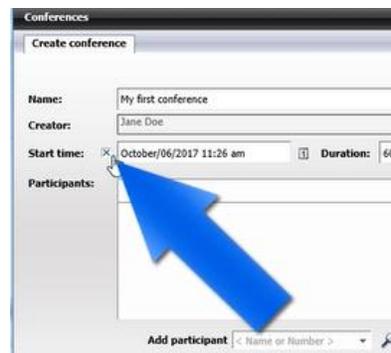
A Persistent Conference line - stays open and available until deleted

Leave the box next to "Start time" unchecked and proceed with setup.



Scheduled Conferences

Check the box next to "Start time."



Click anywhere within the date-picker to set the start date.



Use the sliders to set the start time - make sure to allot enough time for your call as the conference line closes at the specified end time.





Setup

When creating a conference, you are automatically added to the conference as the first participant.

If you'd like more control over the conference once it starts, uncheck the "Open Conference" box to assign yourself as a moderator.

The screenshot shows the 'Create conference' dialog box. The 'Name' field is 'My first conference'. The 'Creator' is 'Jane Doe'. The 'Start time' is 'October 11, 2017 08:30 am' and the 'Duration' is '30 Min'. The 'Participants' list shows 'Jane Doe' with phone number '+1(503)373-7127' and the role 'Moderator'. The 'Options' section has 'Open Conference' checked, 'Record Name' checked, and 'Video conference' unchecked. A blue arrow points to the 'Open Conference' checkbox.

The screenshot shows a close-up of the 'Participants' list. It shows 'Jane Doe' with phone number '+1(503)373-7127' and the role 'Moderator'. A blue box highlights the 'Moderator' role.

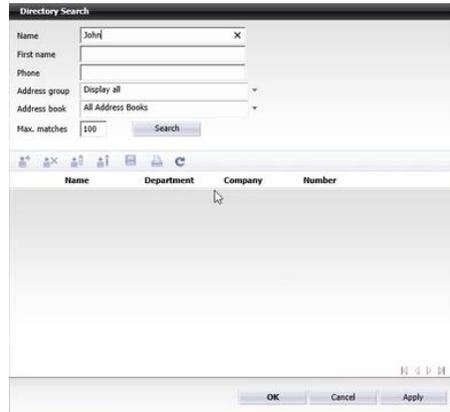
To add participants that you have as contacts, type their name in the "Add participant" drop down menu and select from the list.

The screenshot shows the 'Add participant' dropdown menu. The menu is open, showing a list of contacts: 'Doe, John +15033737129', 'Doe, Jane 15033737139', 'John Doe 9714096775', '+5033737137', and '+15033737127'. A blue arrow points to the dropdown menu.

If you'd like to add someone to the conference who isn't one of your contacts, you can input their phone number.



If they're a State of Oregon employee on the system, search by name.



Edit Participants

Once added, participant entries can be edited using the icons on the right side of the window.

To edit the name or preferred number for a participant, click the "Edit entry" icon.



To remove a participant from the list, click the "Delete participant" icon.





Control Participant Calls

The green icon in-between the edit and delete options controls how the call will be initiated for that participant.



A right facing arrow indicates that the conference line will call the participant once the conference begins - users called using this feature will not have to enter a conference pin to connect. This is the default setting for conference creators.



A left facing arrow is the default setting for conference participants. Anyone with this setting will have to call in and enter the pin before joining the conference.



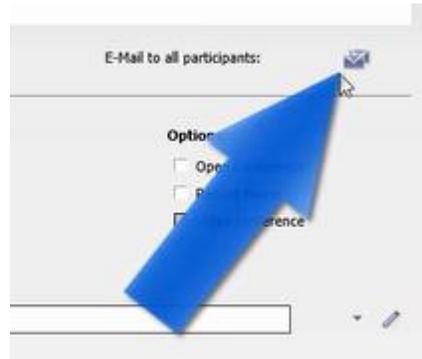
Once you have everything configured, click "APPLY" to save the conference.



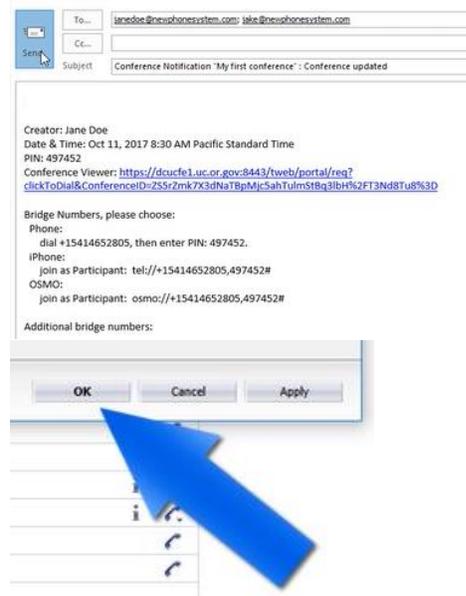


Email Participants

You can now click the "Email to all participants" icon to easily send out the conference information.



Click "OK" to close the conference creation window.



Edit Conference Details

If you need to edit the details of a conference after closing the conference creation window, select the conference you'd like to edit and click the "Modify selected conference" icon to make any necessary changes - remember to resend the email confirmation to participants.

