INSTANT TELECONFERENCE USER GUIDE

inform • manage • respond

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Overview

Instant Teleconference is a feature which will allow your organization to easily and quickly set up a conference call with all relevant and important personnel within minutes of a crisis or emergency. This feature of EmergHub is unique in that it allows you to dial out to the people with whom you need to communicate rather than having to send out call-in numbers and codes to everyone. However, the module does also support standard dial-in teleconference participation.

After the instant teleconference has finished, you are able to view reports on the number of call attendees as well as the total length of the call. The teleconferences are also able to be recorded for later replay.

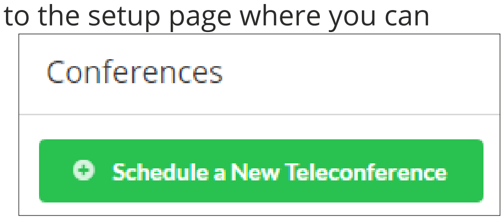
Instant Teleconference Dashboard

The Instant Teleconference Dashboard can be found in the top bar of the EmergHub platform in the Applications dropdown menu. The dashboard is the main page of the module which allows you to schedule a new teleconference, edit an existing draft of a teleconference, or access the reports of completed teleconferences.

From the Dashboard, you are able to:

1 Schedule a New Teleconference

If you would like to schedule a new teleconference, navigate to the top of the Instant Teleconference Dashboard on the left-hand side where you will see a green Schedule a New Teleconference button located to the right of the Start Now button. Clicking this button will direct you to the setup page where you can configure and schedule a new teleconference.



2 View List of Teleconferences

Below the Schedule button at the top of the Instant Teleconference Dashboard, you will see a list of all of the teleconferences you have created, deployed, and scheduled, with the most recent appearing at the top. If there are no teleconferences listed, this means you have not yet created one.

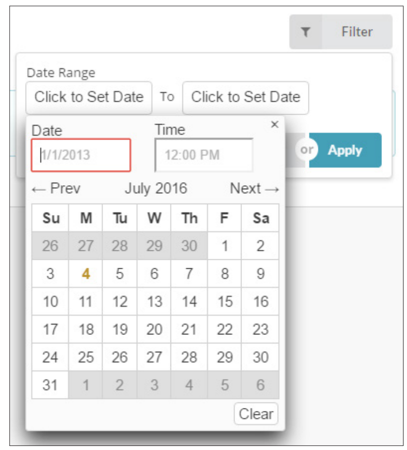
3 Navigate Multiple Teleconference Pages

If you have created enough teleconferences, they will be displayed on multiple pages in the Instant Teleconference Dashboard.

To view a teleconference that does not appear on the first page of the list:

- Navigate down to the bottom of your screen where you will find the page numbers indicating the total number of teleconferences you have created
- Click either the page number you would like to visit to proceed to another page of conferences or the Next button, which will take you to the next page of conferences
- Choose how many teleconferences to display at a time by clicking on the “Showing…” link located to the right of the number of displayed conferences

4 Filter Teleconferences



You have the ability to filter your teleconferences to show specific ones from a particular date, at a particular time, or within a certain window of time.

To filter your teleconferences:

- Find the gray Filter button that is located at the top right-hand side of your screen in the main Instant Teleconference Dashboard, directly above the list of teleconferences, beside the search bar
- Click the Filter button and a dropdown menu will appear in which you will see two boxes that say Click to Set Date
- Click either box and another dropdown menu will show up with two fields labeled Date and Time in which you can manually insert the date and time you would like to filter teleconferences from
- Below these fields there is a calendar you can also use to choose the date that you would like to filter conferences from
- Click Apply to implement the filter. Or, click Clear if you do not wish to filter your teleconferences, which will close the dropdown

5 Edit Teleconference Drafts

Once you have teleconferences in your list on the dashboard, whether drafts, scheduled, or completed, they will appear in the list of conferences on the main Instant Teleconference Dashboard.

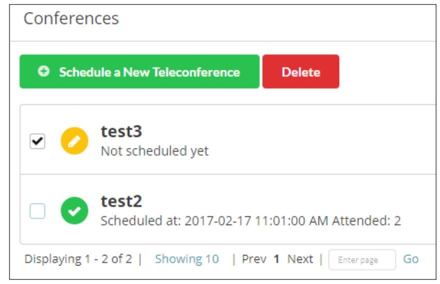
To edit an existing teleconference draft:

- Click the blue Edit button located at the far right of the screen across from the corresponding teleconference name
- The Teleconference Setup page will appear where you are able to modify the conference settings
- Click Next at the bottom of the page to save your edits or continue to click Back to return to the main Instant Teleconference Dashboard without making any changes

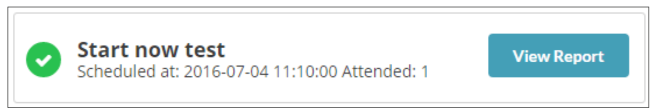
6 Delete a Teleconference

To delete a teleconference:

- Locate the checkboxes to the left of the conference name in the list
- Select one or more teleconferences you wish to delete and a red Delete button will appear to the right of the green Schedule a New Teleconference button at the top of your screen
- Clicking this button will make a pop-up window appear asking you to confirm the deletion
- Click the blue Delete button to confirm, or Cancel to close the pop-up without confirming the deletion



7 Access Teleconference Reports



You can view the report for any teleconference that has already been completed. Just like with editing a teleconference draft, simply choose the conference you would like to view a report for and find the blue button to the far right of the teleconference's name that says "View Report." Having clicked this button, you will be directed to the main Reports page, which will display all the data information received for that particular teleconference. For more information about Instant Teleconference reports, please refer to page 21 of this documentation.

Schedule a New Teleconference

Once you have clicked on the Schedule a New Teleconference button in the Instant Teleconference Dashboard, you will receive a pop-up window which will ask you to name your new project. Once you have provided a name in the textbox, click OK to proceed to the next page. Alternatively, click Cancel if you wish to return to the main Instant Teleconference Dashboard without creating a new conference.

Teleconference Setup

Once you have given your new Instant Teleconference a name and clicked OK, you will be directed to the first page of the teleconference setup process.

On this page you can:

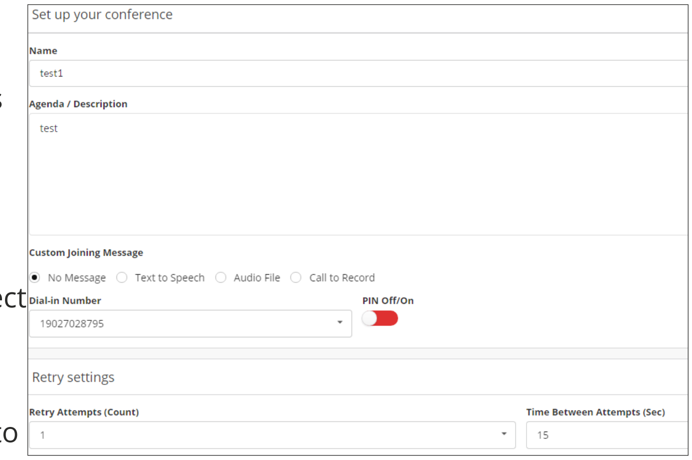
1 Edit the Teleconference Name and Agenda

On this page, the first field you will see is the Name field where you can modify the name of your teleconference if you so choose. There must be text in this field in order to proceed to the Add Participants stage.

The field below the Name field in the Teleconference Setup page is the Agenda/Description textbox. This is where you can enter a description of the teleconference's purpose. This is an optional field.

2 Create a Custom Joining Message

The Custom Joining Message is an optional feature that allows you to create an audio message that will be played once the teleconference participants answer their phones and are connected to the conference.



There are four options in this section:

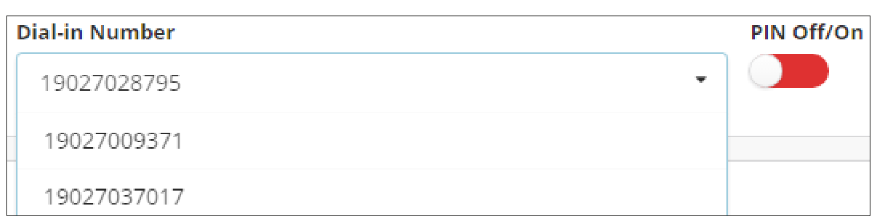
- **No Message:** This option means there will be no custom message that will play once participants connect to the call. A default joining message will be used instead
- **Text-to-Speech:** This option means that you are able to type out a joining message that will be converted into an automated voice. Clicking this option will produce another field below this section where you are able to type out your custom joining message
- **Audio File:** This option means that you are able to upload a pre-recorded audio file to use for your custom joining message. Clicking this option will produce a gray Choose Audio File button below this section that you are able to use to upload your chosen file from your device
- **Call to Record:** This option means that you are able to have the system call you so you can record your custom joining message using your own voice. Clicking this option will produce three new fields below this section. The first field is where you will type out your phone number that the system will dial to begin recording your message. When you have inputted the number you would like to use, click the blue Call Me button located to the right of this field. Insert the code that will appear on your screen and when prompted, you may start your recording. When you have finished recording, it will appear in the third field below the Custom Joining Message section

3 Choose a Dial-in Number

Below the Custom Joining Message section you will see another field called Dial-in Number. In this field, you must select the phone number your teleconference participants can dial into in order to connect to the conference if they aren't able to be dialed-out to.

This phone number also serves as the Caller ID number that will show up on the participants' phones when they receive an instant teleconference call. **When you click on this field:**

- A dropdown menu will appear with a list of available dial-in phone numbers connected to your EmergHub account
- Click on the number you wish to use as your teleconference's dial-in number



[**Note:** These numbers have been pre-configured by the system management.]

4 Include a Security PIN

You have the ability to enable a security PIN for the teleconference, meaning that every participant must enter a secure code before they can be connected to the conference. The PIN for the teleconference will be given to each participant before the teleconference begins through the invitation/reminder setup further on in the teleconference setup process.

Should you choose to enable the security PIN feature:

- Locate the PIN On/Off toggle button in the center of your screen next to the Dial-in Number field
- Click on this toggle to position it to the right-hand side to turn it on. It should now be colored green
- Once you enable the feature, a new field will appear to the right of the toggle where you are able to input the PIN you would like to use
- The PIN can be made up of a maximum of six numerical digits

5 Configure Retry Settings

Retries are essentially subsequent attempts at dialing the teleconference participant into the conference should they not pick up the phone the first time. In this section of the contact selection process you are able to determine how many times you want the system to attempt to reach the recipient. **In this section, you are able to:**

1. Set Your Retry Attempt Count

This is the left-hand field in the Retry Settings section of the Add Participants page. This field enables you to indicate the number of times you want the system to dial out to a particular contact should they not pick up their phone the first time.

Use the arrows that appear in the dropdown menu found in the field to select the number of retries you would like.

[**Note:** There can be a maximum of five retries made to the same contact. Increases are only available in increments of 15 seconds.]

2. Determine Time Between Retry Attempts (Sec)

This field appears to the right of the Retry Attempts field and allows you to determine the time the system waits before it attempts to re-dial an unresponsive contact. To determine the wait time (in seconds), use the arrows that appear on the right of the field when you hover your mouse. The maximum number of seconds between attempts is 300 (five minutes). The minimum wait time is 90 seconds..

5 Join Participants Muted

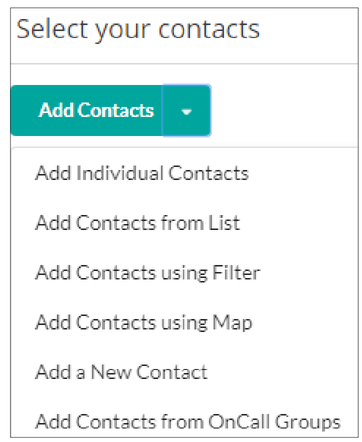
To have teleconference participants automatically muted when then join a conference, simply slide the Join Participants Muted toggle that appears at the top of the Contact Selection page in the Teleconference Setup process over to the right-and side so that it appears to be green. This will cause all participants to be muted immediately once they join a conference.

Once on the call however, these participants are able to unmute themselves by pressing 1 on their dial pad, or “raise their hand” by pressing 2 to be unmuted by the host of the conference.

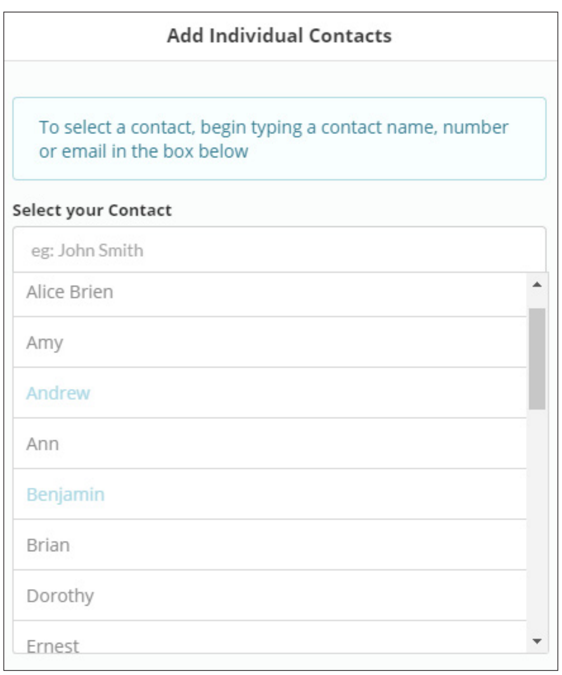
Add Teleconference Participants

This is the second page of the teleconfererence setup process when using the Schedule option.

This page allows you to begin adding your teleconference participants. To add your participants, click the blue Add Contacts button on the page. Clicking this button will open a dropdown menu, providing you with different options as to how you can select the contacts you would like to add to your teleconference:



- Add Individual Contacts
- Add Contacts From List
- Add Contacts Using Filter
- Add Contacts Using Map
- Add a New Contact
- Add Contacts From OnCall Groups

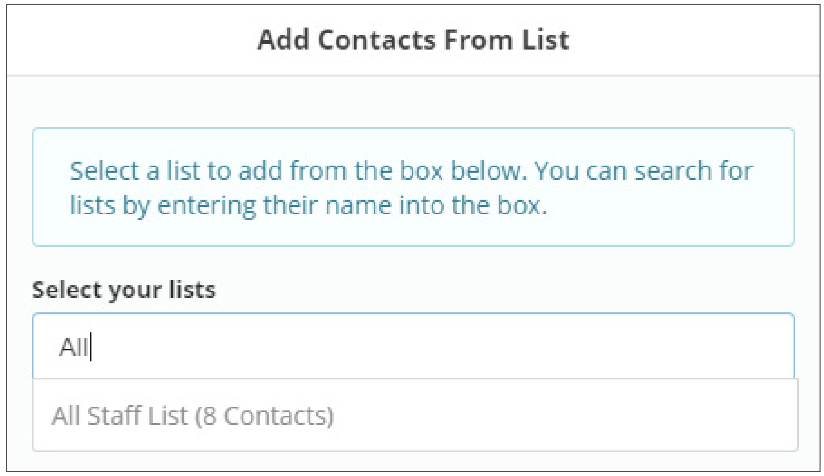


Add Individual Contacts

To manually add individual contacts:

- Choose Add Individual Contacts from the blue Add Contacts button’s dropdown menu
- Type in the contact’s name in the field provided in the sidebar that appears
- The list of contacts will automatically be filtered as you begin typing the contact’s name
- Click on the contact name you wish to add once it appears in the filtered dropdown
- Continue adding contacts manually without closing the sidebar
- Click the Add Contacts button at the bottom of the sidebar once you have all the contacts selected that you are looking for
- Click the Cancel button to close the sidebar without adding any contacts

Add Contacts From List



To select your teleconference participants based on pre-defined lists found in your Contact Manager):

- Choose Add Contacts from List from the blue Add Contacts button's dropdown menu
- A sidebar will appear where you can choose which list(s) you would like to be a part of the teleconference
- The list options will automatically be filtered when you begin typing the name of the list you want in the field provided
- Continue adding lists this way without closing the sidebar
- Click the blue Add Contacts button at the bottom of the sidebar once you have all the contacts you are looking for
- Click the Cancel button to close the sidebar without adding any lists

Add Contacts Using Filter

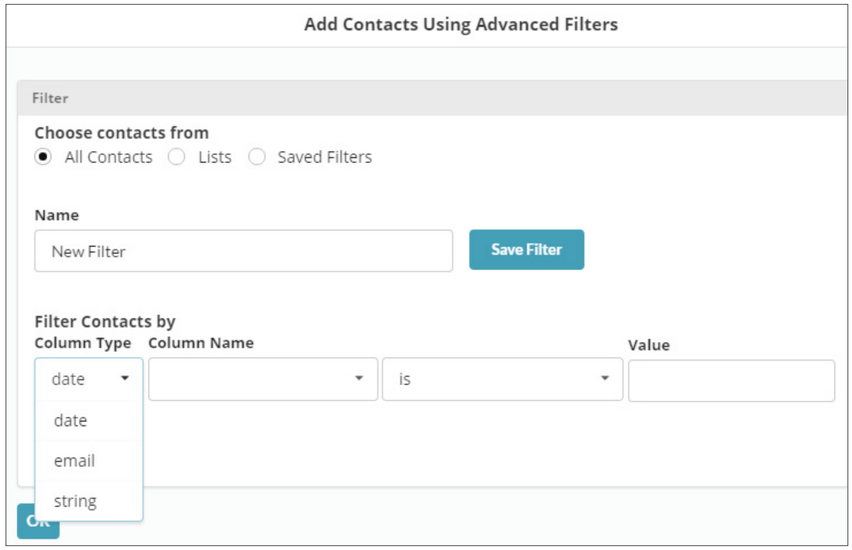
To choose your contacts through the use of advanced filters:

1. Choose Add Contacts Using Filters from the blue Add Contacts dropdown menu
2. A sidebar will show up, where you will be asked whether you would like to choose your contacts from:
   - **All Contacts:** This option allows you to filter your contacts from your entire contact database
   - **Lists:** This option lets you filter your contacts from selected lists of contacts in your Contact Manager. If you choose to select your contacts using lists, you will see the option to choose your list(s) in the dropdown menu provided
   - **Saved Filters:** This option lets you filter your contacts through a previously saved filter you created

[**Note:** If you choose the Saved Filters options to select your teleconference participants, you will be provided with a dropdown menu allowing you to choose from a list of saved filters. If you wish to create a new saved filter, you can type in the name you wish to call it in the Name field found under the Saved Filters dropdown and click the Save button.]

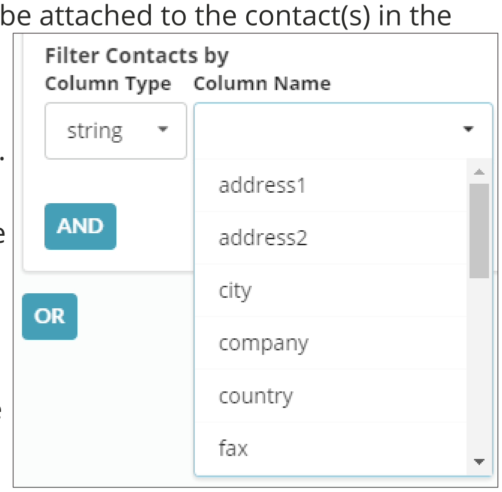
3. After choosing a filtering method, proceed to the "Filter Contacts by" section further down in the sidebar
4. Here, you are able to filter your contacts by column type, column name, and value. "Column" refers to each contact's profile in the Contact Manager and the fields of information found therein

Column Type: This option refers to the type of data found in a particular column in the contact's Contact Manager profile. A data type is assigned to a column when it is created in the Contact Manager



There are three options in the Column Type dropdown menu:

- **Date & Time:** Selecting the date option as your column type will give you different options in regard to the column name. In the **Column Name** field (the information fields found in the profile within each column type), you are given the choice between when the contact was created or when the contact was last modified. These options refer to the date in which the contact's profile was either created or changed in the Contact Manager
- **Email Address:** Selecting email as your column type gives you only one option in terms of **Column Name:** email. This refers to the email address of the contact(s) you would like to add as your teleconference participants
- **Location (Lat, Long):** Selecting Location as your column type gives you only one option in terms of **Column Name:** location. This refers to a particular location that may be attached to the contact(s) in the Contact Manager you would like to add as your participants
- **Phone Number:** Selecting phone number as your column type gives you three options in terms of **Column Name:** fax, mobile, and phone. These refer to either the fax number, mobile number, or phone number of the contact(s) you would like to add as your teleconference participants
- **Text:** Selecting the text option as your column type gives you multiple options as to selecting a column name. Text refers to a particular row of information in the contact's Contact Manager profile



Options in the Column Name field include:

- Address 1
- Salutation
- Company
- Title
- Mobile
- Address 2
- City
- State
- Fax
- Zip
- Preferred method
- Source
- Country
- Twitter
- Name

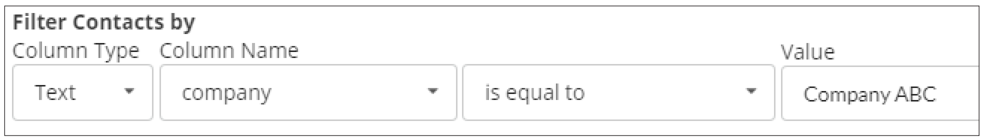
5. Choose your column type and name through which you would like your contacts to be filtered
6. Adjust your filtering parameters by selecting from the dropdown of options in the field directly to the right of the Column Name field

   These options include:

- Contains
- Doesn't contain
- Ends with
- Is greater than
- Is greater than or equal to
- Is equal to
- Is not equal to
- Is less than
- Is less than or equal to
- Starts with

7. Insert a value into the Value field to determine how the contacts are being filtered
    - **Value:** Once you have selected a parameter option, you must then insert a value into the Value field on the right-hand side of the sidebar. The value indicates what information the contact must possess or not possess to be included as a teleconference participant

For example, say you would like everyone whose Contact Manager profile says that work for a specific company (Company ABC) to participate in the teleconference. **To do this:**



- Select "Text" as your column type
- Select "Company" as your column name
- Select "Is equal to" as your parameter
- Input "Company ABC" as your value, since you wish only those who work for this company to participate in the teleconference
- The filter would look like this: *Text > Company > Is equal to > Company ABC*

You are able to set up multiple filter options by clicking either the And or Or buttons, which will add a field. Choosing "And" will cause the filtering process to look at both of these filter options and only invite contacts into the teleconference if they meet the parameters of both filter options.

For example, say that in addition to working for Company ABC, in order for a contact to be invited to participate in the teleconference, they must also work at the Dartmouth, Nova Scotia branch of the company. To demonstrate this example:

- Select the "And" button to create a new field below the first filter
- Select "Text" as your column type
- Select "City" as your column name
- Select "Is" as your parameter
- Insert "Dartmouth" as your value.
- The new filter would look like this: *Text > Company > Is equal to > Company ABC* **AND** *Text > City > Is equal to > Dartmouth*

Now, only those contacts in your Contact Manager who work for Company ABC's Dartmouth branch will be invited to participate in the teleconference.

On the other hand, choosing "Or" will cause the filtering process to look at the two filter options and if at least one of them applies to the contact, they will be invited to participate in the teleconference. For example, we will start with the first filter we applied where wanted to send a teleconference invite to contacts who work at Company ABC. However, we also want contacts to take part in the teleconference if their last name is Smith.

To create this new filter option:

- Select the "Or" button to create a new field below the first filter
- Select "Text" as the column type
- Select "Name" for the column name
- Select "Contains" as the parameter
- Input "Smith" as the value
- Now, the new filter will look like this: *Text > Company > Is equal to > Company ABC* **OR** *Text > Name > Contains > Smith*

This means that any contacts in your Contact Manager that are listed as working at Company ABC, or who may not necessarily work for this company but their last name is Smith, will be invited to participate in the teleconference.

Once you have determined which contacts you wish to participate in the teleconference, you can close the sidebar by clicking Add Contacts at the bottom. Or, click Cancel to close the sidebar without choosing any contacts.

Add Contacts Using Map

There are two ways to add contacts from specific geographic areas:

[**Note:** In order to add contacts using map, you must have the contact's latitude and longitude location information registered in their Contact Manager profile.]

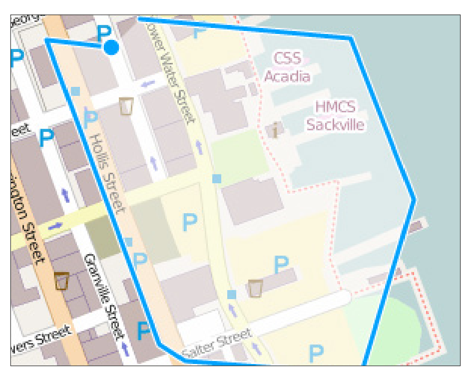
[**Note:** You must have Map permissions enabled in your account to be able to select contacts using the Map feature. Refer to the Account Networks User Guide for more information about permissions.]

1 Draw a New Region

This option allows you to create a new region on a map wherein the contacts who live specifically in that area will be invited to participate in the teleconference.

Select the Add Contacts Using Maps button from the Add Contacts button's dropdown menu and a sidebar with a map will appear from the right side of your screen.

Locate the three blue buttons located on the far left of the map, one with a white arrow, one with a paintbrush, and one with a funnel. Clicking the arrow button will allow you to click and drag on the map to change your position, the paintbrush button allows you to draw new regions on the map, and the funnel button allows you to filter the information you see on the map.

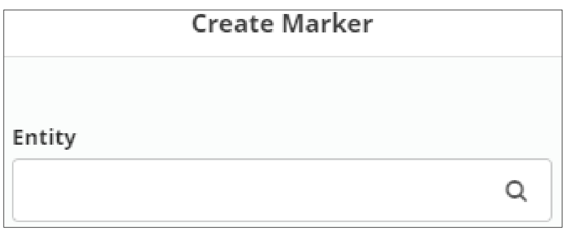


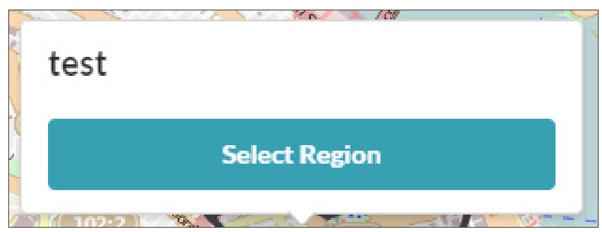
To zoom in and out on the map, locate and click on the "+" and "-" buttons found at the top left-hand corner of the map.

To create a new region on a map:

- Determine the area on the map where you would like to select your contacts from
- Click the blue paintbrush button on the left side of your screen, which will activate a blue dot at the end of your mouse

- Click on the map where you would like to begin drawing the region and a point will be marked. When you move your mouse a line will extend from the first point you clicked on the map
- Continue to click your mouse to create more points on the map until you come back to the original point, creating a new filled-in region
- Once the region is filled in, a new sidebar will appear asking you to choose an entity to associate with the region from the Entity dropdown menu. If there are no entities available, you will have to create a new entity in the Blueprints module. Refer to the Blueprints User Guide for more information on how to create a new entity
- If you are able to choose an entity, you may see other fields appear below the Entity field in this sidebar. Fill out these fields and click the blue Save button to save the new region, or the Cancel button to close the sidebar without saving your region
- When you have finished creating and naming your region, you may see another pop-up appear if the entity layer on the map has been hidden from view, asking if you would like to show the layer. If you see this pop-up and wish to view the map layer with the new entity, click the blue OK button
- Now you can click on the region to select it as part of your conference contact set. Click the blue Select Region button and the region will be added to the sidebar on the right. Once you have added all the regions you want to the sidebar, click the blue Confirm button at the bottom right of your screen to return to the teleconference setup process, or click Cancel to return to the setup process without selecting any regions



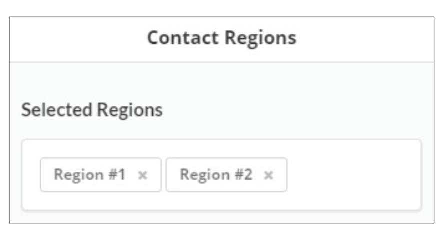


2 Select an Existing Region

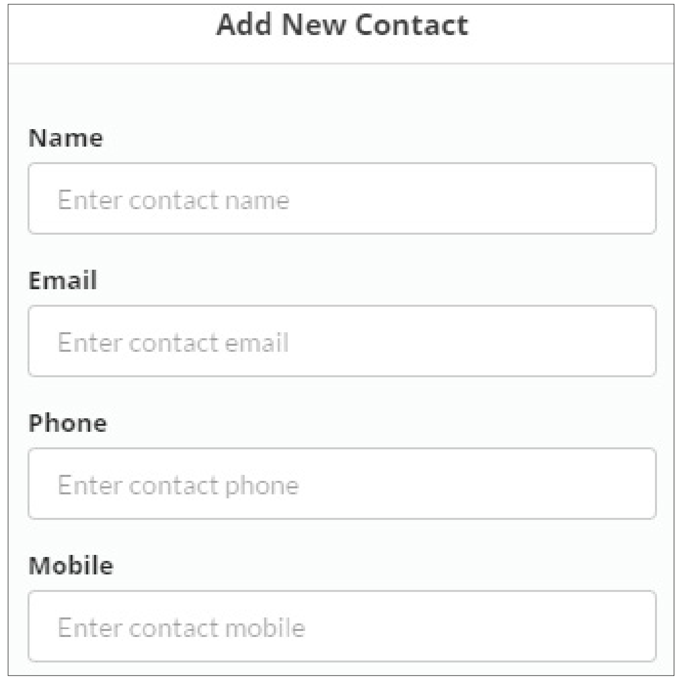
This option allows you to select a previously-created region on your map to choose your contacts from. When you select the Add Contacts Using Map option from the Add Contacts dropdown, the map will open from the right side of your screen.

To select an existing region on a map:

- Locate the region on the map where you would like to select your contacts from
- Click on the region, which will bring up a pop-up with a blue button that says Select Region
- Clicking this button will add the region to the list of selected regions in the sidebar at the right of your screen
- Continue to add regions this way until you have added all the contacts you wish to participate in the teleconference
- Click the blue Confirm button found at the bottom right-hand side of your screen to add these contacts, or click Cancel to close the map view and select another way of adding teleconference participants



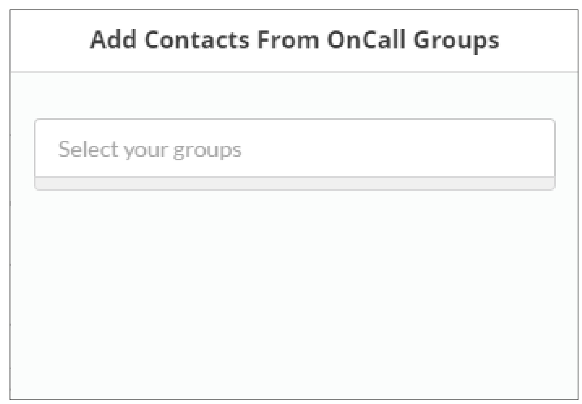
Add a New Contact



To add a new contact who isn't already in your Contact Manager to the list of teleconference participants:

1. Select the Add a New Contact button from the Add Contacts button's dropdown menu
2. A sidebar will appear allowing you to enter the name, email, phone number, and/or mobile phone number of the new contact
3. Click the Add Contacts button at the bottom of the sidebar to close the window or Cancel to return without adding the contact
4. As well as participating in this teleconference, the new contact you added will also be added to your Contact Manager where they will be available to be selected to participate in any future teleconferences

Add Contacts From OnCall Groups



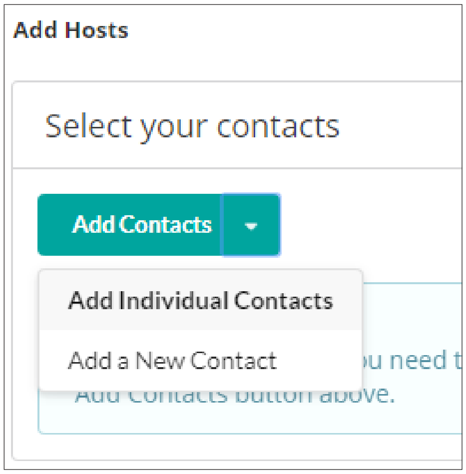
To add contacts from one of your OnCall groups:

1. Select the Add Contacts From OnCall Groups button from the Add Contacts button's dropdown menu
2. A sidebar will open with a field where you can select the OnCall group(s) you would like to participate in the teleconference from the dropdown menu of options
3. Continue adding groups this way without closing the sidebar
4. Click the blue Add Contacts button at the bottom of the sidebar once you have all the contacts you are looking for, or click Cancel to close the sidebar without choosing your contacts. Refer to the OnCall User Guide for more information on OnCall groups

[**Note:** Only the members of the group who are on call at the time of sending will be contacted to participate in the current teleconference.]

Add a Teleconference Host

You are also able to designate one or more contacts to serve as the host(s) of the teleconference. Teleconference hosts are the only contacts who will never be muted once the Mute All function is enabled, and will be able to mute all contacts from their phone. They will also not be affected by the Join Participants Muted toggle. This is an optional feature that can be enabled and configured if desired.



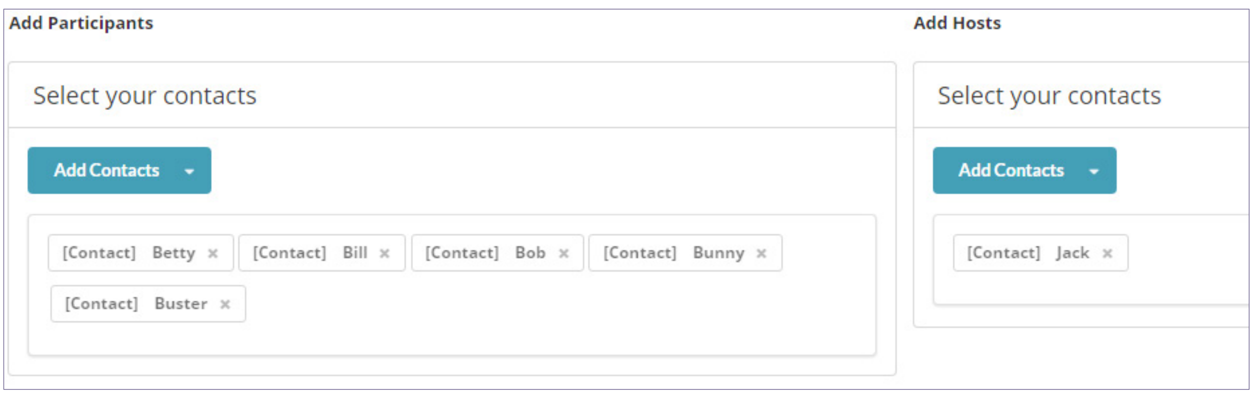
[**Note:** Hosts are still able to mute themselves as well as be muted by the conference administrator who has access to the Monitor page.]

On the Contact Selection page in the Instant Teleconference setup process you will see the Add Hosts section on the right-hand side of your screen.

To choose a Teleconference Host:

1. Click the blue Add Contacts button to reveal a dropdown menu where you can choose a contact selection method
2. Choose to either add individual contacts who are already found in the Contact Manager or to add a brand new contact, and a sidebar will appear to the right of your screen where you can choose/add the contact(s) you wish to be designated conference host(s). For more information on either of these contact selection options, refer to pages 6 and 12 respectively
3. To remove a chosen contact as a host, click on the "X" located to the right of the contact's name appearing in the box below the blue Add Contacts button

[**Note:** You only need to add a contact once as either a regular participant or a host.]



Invitations and Reminders

At the bottom of the Add Participants page of the teleconference setup process, you will see where you are able to set up invitations to the teleconference as well as reminders to be sent out in advance of the conference.

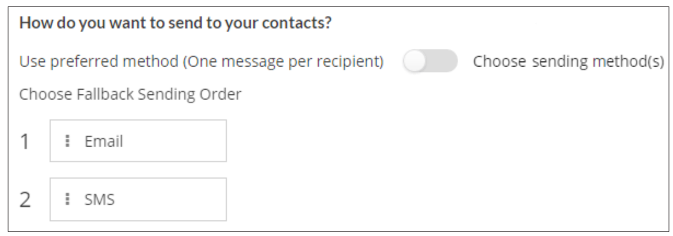
Invitations

You have the option to send out teleconference invitations to your intended teleconference participants to make them aware of the impending conference and invite them to participate. **To enable the Conference Invitations feature:**

- Click on the toggle that appears on the left side of this page underneath the Conference Invitations header so that it is situated to the right and appears green
- Once enabled, another section will appear directly underneath this section where you will be asked to determine how you wish to send the invitations to your contacts
- There are two methods by which you can send invitations: via the contacts' preferred communication method or by communication methods that you have manually chosen

1. Use Preferred Communication Method

By choosing to send your teleconference invitations via a contact's preferred method of contact, this means that the invitation will be sent through the channel that the contact has indicated they would like to receive messages from.



[**Note:** This information will be stored in the Contact Manager if available.]

To choose to send the invitation to your recipients' preferred method:

- Click on the radial button found underneath the Choose Contact Send Preference header
- Determine the Fallback Sending Order

Fallback Sending Order

The fallback sending order refers to the order of the channels to which the teleconference invitation will be sent to each contact who has NOT indicated a preferred method of contact.

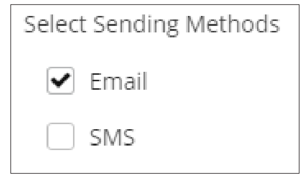
To determine the fallback sending order:

- Click and drag the two options (email and SMS) into the order you would like them to be used
- For example, if your fallback sending order is ranked email, then SMS, the system will look for an email address in the contact's Contact Manager profile first, and if it finds one, the invitation will be sent via that delivery method
- If the system does not see an email address, then it will look for a mobile phone number in the profile to which to send the invitation via SMS
- The system will keep searching in the order of devices you select until it finds a delivery method that it can use to send the invitation to the contact
- Click Next to complete the setup process and proceed to the main Instant Teleconference Dashboard or proceed to the Conference Reminder section on the right side of the current screen

2. Choose Communication Method(s)

Choosing to send your teleconference invitation through the Choose Communication Method(s) option means that you are able to manually choose which delivery methods you would like to use to send the invitation to all of your chosen contacts.

To select the Choose Communication Method(s) option:



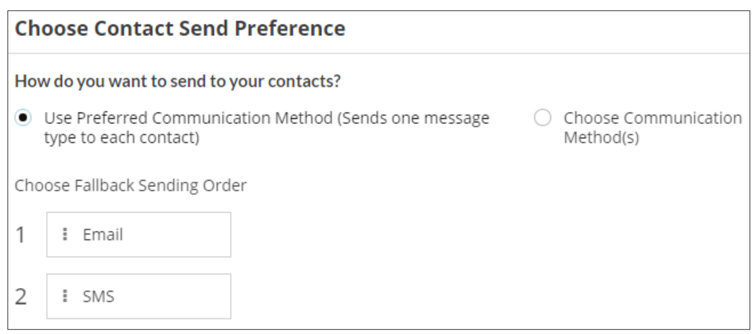
- Click the radial button that's located underneath the Choose Contact Send Preference header
- Check off the delivery method(s) you would like to use to send your conference invitations in the section that appears below the radial button options
- Depending on how many options you have checked off, each of your contacts will receive the invitation through each of those methods, provided that contact information is available in their Contact Manager profile
- For example, say you checked off both email and SMS as your sending methods of choice. The invitation will then be sent out via email and SMS to every one of your chosen contacts. This means that if a contact has provided an email address and a mobile phone number in their Contact Manager profile, they will then receive the same invitation twice, once via email and once via SMS
- Click Next at the bottom of your screen to proceed to the scheduling portion of the setup process or proceed to the Conference Reminder section

Next, choose a sender email address from the dropdown menu appearing to the right of the Contact Send Preferences radial buttons. Contacts will receive the conference invitation from this email address should the invitation be sent out over the email channel.

Reminders

Along with sending invitations to your teleconference participants, you are able to send a message to them to remind them about the date and time of the upcoming conference.

To enable the Conference Reminders feature:



- Click on the toggle that appears under the words Conference Reminders
- Once enabled, another field will appear underneath the toggle, where it will ask you how many minutes before the conference you would like to send the reminder. Make your selection from the dropdown menu available in this field
- Next, in the section appearing below the toggles, you will be asked to determine how you wish to send the reminders to your contacts
- There are two methods by which you can send reminders: via the contacts' preferred communication method or by a communication method that you have manually chosen

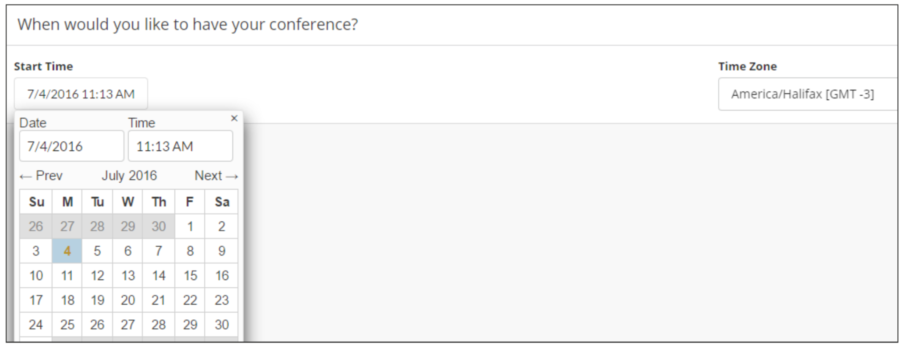
Please refer to page 14 for a breakdown of these two sending methods.

Next, choose a sender email address from the dropdown menu appearing to the right of the Contact Send Preferences radial buttons. Contacts will receive the conference reminder from this email address should the reminder be sent out over the email channel.

Start Date and Time

After clicking the Next button once having selected your contacts, you'll be directed to the next page of the teleconference setup process where you must determine a date and time for when you would like to hold the teleconference, as well as the time zone in which you would like the system to operate.

To set the start date and time for your teleconference:



- Find the Start Time field located on the left side of your screen
- Click on the field and a dropdown calendar will appear where you may select the date and time of your conference
- In the dropdown, there will be both a Date and Time field where you can manually enter your preferences for the start date (mm/dd/yyyy) and start time
- Alternatively, to choose a start date you can simply click on the appropriate day block in the calendar grid

To choose a time zone you would like the system to recognize when looking to begin the conference:

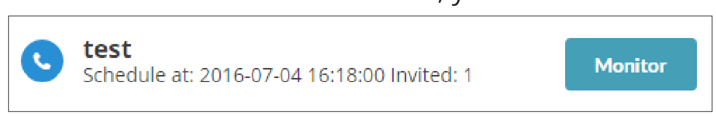
- Click on the Time Zone field located on the right side of the Start Time field
- A dropdown menu will appear providing you with a list of time zones from which you can choose

Once you have finished setting up the configuration of your new teleconference, click the Next button found at the bottom right-hand side of your screen to complete the setup and proceed to the main Instant Teleconference Dashboard.

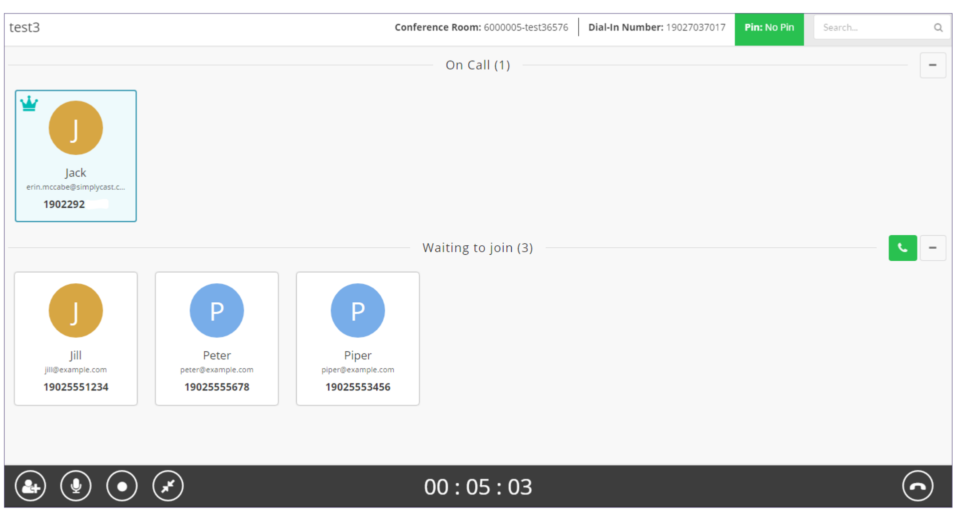
In Progress Teleconferences

When there is a teleconference in progress, you have the ability to monitor the call and manage the participants who have joined in and those who have yet to join.

Once you have finished the setup process and clicked Next to complete the configuration of the teleconference, you will be directed back to the main dashboard. On the main dashboard, you will see the newly configured teleconference at the top of the list. Next to the teleconference name you will see a button on the right-hand side.



The blue button will not say Queued, allowing you to return to the setup process and modify settings before the teleconference begins. Once the time comes for the conference to begin, the Queued button will change to Monitor, allowing you to go into the Live Teleconference Dashboard and manage the in progress conference.

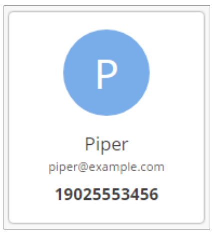


Live Teleconference Dashboard

After being directed to the Live Teleconference Dashboard, you are able to:

1 View Who is Currently on the Call

The On Call section appears at the top of the Live Teleconference Dashboard and displays the teleconference participants who are currently taking part in the teleconference.

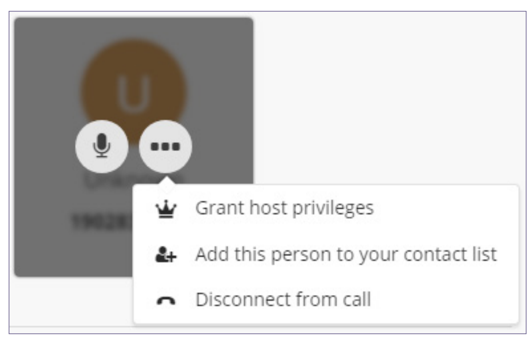


Each participant is displayed in their own contact box in the On Call section with their name, photo if available, and any other contact information made available in the EmergHub Contact Manager such as email, phone number, and role. If there is an image of a crown in the top left corner of the contact box, this means that this contact is the designated conference host. Refer to page 12 for more information on conference hosts.

Hovering over a contact box will bring up to circle buttons, one with a microphone and the other with three horizontal dots.

Clicking the microphone button will allow you to mute that particular participant so that you will no longer be able to hear them speak in the main conference. You are also able to mute the host from this dashboard. When you click this button, it will change to show a crossed out microphone to indicate that this participant has been muted. To unmute the participant, click this microphone button in the contact box for a second time.

When you click on the three dot button, a dropdown list of options will appear:

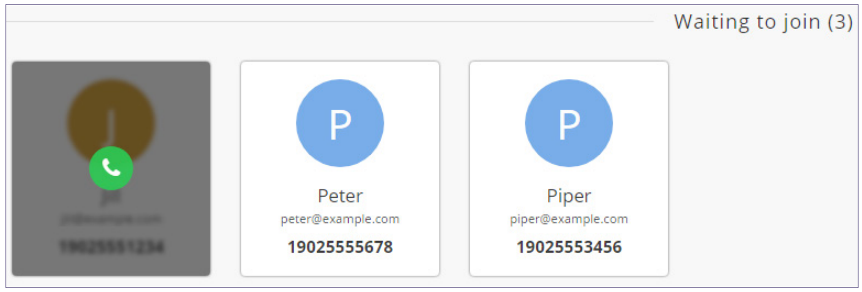


- **Grant/Remove host privileges:** Depending on whether the participant is already a conference host or not, the host or the conference administrator with access to the Monitor page is able to give this contact hosting privileges or take them away. Refer to page 12 for more information on conference hosts
- **Add this person to your contact list:** If an unknown contact has joined your teleconference (not a part of your Contact Manager) and you have confirmed that this person is who they day they are, you can add them to your contact list. Choosing this option will open the Add a New Contact sidebar from the right side of your screen where you can fill out their information

[**Note:** This option will not appear for contacts who are already known to the system.]

- **Disconnect from call:** This option allows the conference administrator to disconnect this particular participant from the call

2 View Contacts Waiting to Join the Call



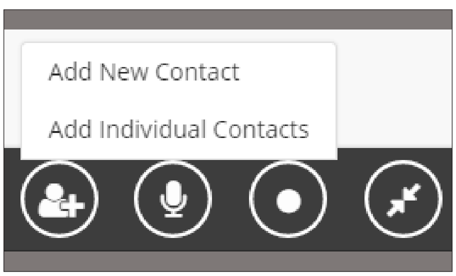
Below the On Call section in the Live Teleconference Dashboard of an active teleconference, you will see the Waiting to Join section with all the teleconference invitees who have not yet joined on the call. Like with the On Call section, these contacts will each have their own contact box with their name, photo if available, and any other contact information made available in the EmergHub Contact Manager such as email, phone number, and role.

Hovering over a contact box will cause a green, circular button with an image of a telephone on it. Clicking this button will dial this participant into the teleconference.

At the top right-hand corner of this section you will see a green, square button with the same telephone image in it. Clicking this button will dial out to all of the conference invitees who are in the Waiting to Join section at once.

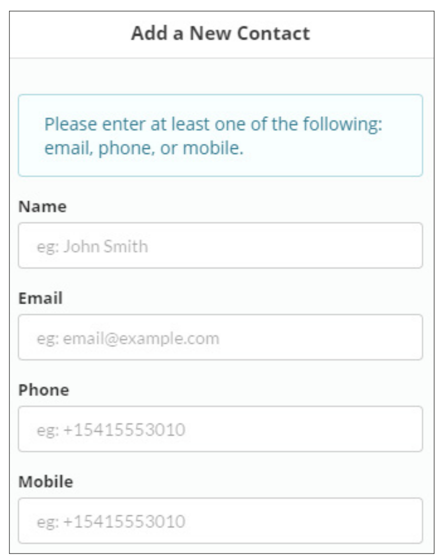
3 Add Participants to the Call

At the bottom left-hand side of the Live Teleconference Dashboard, you will see a white, circular button on the black bar with a contact icon. This button will allow you to add more participants to the teleconference currently in progress.



When you click this button, a dropdown menu will appear with two options as to how you can choose additional participants:

- Add New Contact
- Add Individual Contacts

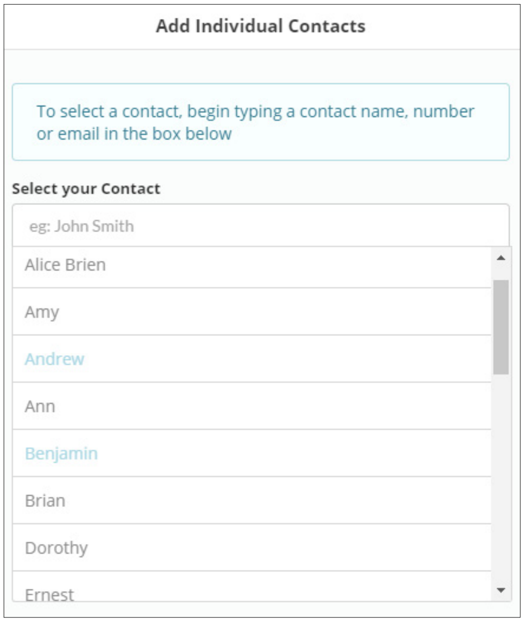


Add New Contact

This option allows you to create a new contact that you can add to the conference. **To add a new contact to the teleconference:**

- A sidebar will appear allowing you to enter the name and contact information of the contact
- Click the Add Contacts button at the bottom of the sidebar to close the window or click Cancel to return without adding the contact
- As well as being added to the teleconference currently in progress, the new contact you added will also be added to your Contact Manager where they will be available to be selected to participate in any future teleconferences.

Add Individual Contacts



This option will let you add a contact to the conference manually.

To add an individual contact:

- Type in the contact's name in the field provided in the sidebar that appears
- As you type the contact's name, contacts will automatically be filtered
- Click on the contact name you wish to add
- You can keep manually adding contacts this way without closing the sidebar
- Once you have all the contacts, click the Add Contacts button at the bottom of the sidebar to add them
- Click the Cancel button to close the sidebar without adding any contacts

4 Mute All Teleconference Participants

At the bottom right-hand side of the screen you will see a white, circular button on the black bar with a microphone image. This button will allow you to mute every teleconference participant so that they will not be heard during the conference.

To unmute the teleconference participants, simply click on the microphone button at the bottom of the screen again.

5 Record the Teleconference

When you have participants currently in a live teleconference, you are able to record the conference for playback and record-keeping purposes.

To begin recording the teleconference in the Live Teleconference Dashboard:

- Look to the bottom left of your screen to find a white circular button with a solid, white circle in the center of it
- Click this button begin the recording
- Click this button again to pause/stop the recording
- If you would like to resume recording at another point during the conference, clicking the Record button once again will resume the recording until it is paused/stopped again

[**Note:** Stopping and starting the recording will not create multiple recordings. A single recording of all the segmented parts will be saved for replay purposes.]

6 Condense Live Dashboard to a Compact View

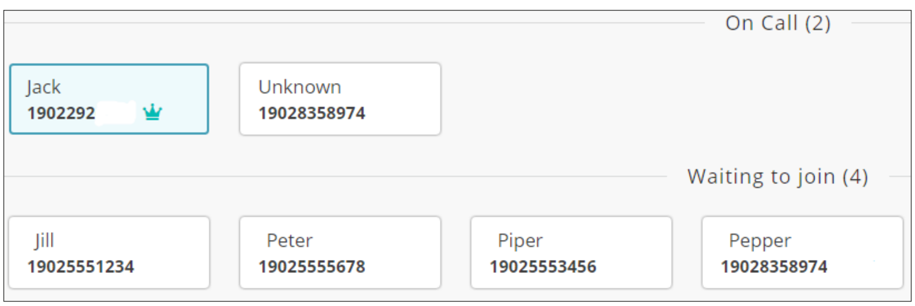
Upon first accessing the Live Teleconference Dashboard during an active teleconference, you will see each conference participant represented by their own contact block that includes their name, a photo if available, as well any available contact information.

Should there be a large number of conference participants, you are able to condense these contact blocks into an easier-to-manage list view.

To do this:

- Locate the dark gray bar at the bottom of the dashboard. On this bar to the left of your screen, you will see four buttons
- The fourth button in from the left displays an image of two arrows. Click this button to condense the contact blocks into a list view
- Click this button again to revert to the original contact display method

You are also able to minimize the On Call and Participant List sections of the page to hide all of the participants and their contact blocks. Locate the gray " – " button found on the right side of the dashboard across from the On Call or Participant List headers. Clicking either of these buttons will collapse the section and hide the participants therein. Clicking the "+" button that appears when the section is collapsed will reopen the section, showing all the contact blocks.



7 Disconnect all Teleconference Participants

Once the teleconference is completed, you will need to end the conference and disconnect all the participants at once. **To do this:**

- Navigate to the bottom right-hand corner of the Live Teleconference Dashboard where you will see three circular, white buttons (if there are still participants actively on the call)
- There will be only two buttons if there are no participants in the On Call section of the dashboard
- The button on the right-hand side in either case will have an image of a telephone
- Click this button to bring up a pop-up window asking whether you would like to end the teleconference and disconnect all participants
- Choose OK to end the conference or Cancel to return to the Live Teleconference Dashboard without ending the conference

Dial Pad Shortcuts

During a teleconference, there are several actions a participant and/or host can perform using the dial pad on their telephones.

Regular conference participants (who aren't hosts) can:

- Press 1 to Mute/Unmute themselves
- Press 2 to raise a hand when muted to be granted speaking access

Teleconference hosts can:

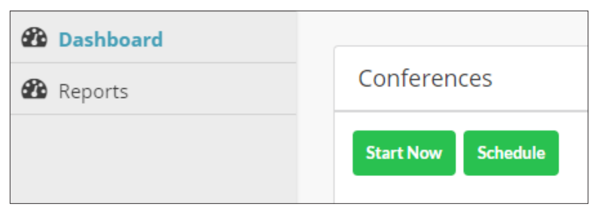
- Press 0 to Mute/Unmute all participants (except themselves)
- Press 1 to Mute/Unmute themselves
- Press 2 to end the teleconference

Reports

To view a report for any of your teleconferences, you must navigate to the EmergHub Reporting interface. **To do this:**

- Go to the main Instant Teleconference Dashboard
- Click the Reports option from the menu at the far left of your screen
- You will be directed to the Instant Teleconference Reporting page in the main Reporting interface

Once in the Teleconference Reporting Dashboard, you are able to:



1 View the List of Reports

When you enter the Instant Teleconference Reports Dashboard, you should immediately see a list of all the conference you have set up and executed.

Each report in the list is broken down into 11 columns of information:

- **Name:** This column displays the name of the teleconference created
- **Agenda:** This column displays the purpose for which the teleconference was created (if available)
- **Status:** This column displays the status of the conference as Complete or Editing
- **Start Time:** This column displays the time when the teleconference is/was scheduled to begin
- **Caller ID:** This column displays the dial-in phone number for the conference, which is also the number that shows up on the participants' caller ID during an Instant Teleconference
- **Participants:** This column displays the total number of participants added to the teleconference
- **Sent:** This column displays the total number of successful phone numbers dialed during the teleconference
- **Failed:** This column displays the total number of failed dialing attempts made during the teleconference
- **PIN:** This column displays the security PIN required to connect to the teleconference if one was set. This field will be filled in with 0 if there was no PIN set

- **Max Retries:** This column displays the maximum number of retries allotted to the system for redialing participants who have not answered the phone
- **Retries Time:** This column refers to the number of seconds the system must wait before redialing an unresponsive teleconference participant

	Name	Agenda	Status	Start Time	Caller ID	Participants	Sent	Failed	Pin	Max Retries	Retries...
	test4	teleconference	Complete	2017-08-09 02:...	190280008...	1	1	0	0	3	30
	test3	teleconference	Complete	2017-04-11 09:...	190270370...	7	13	0	0	0	15
	test2	teleconference	Complete	2017-02-17 11:...	190270287...	2	6	0	0	0	15
	Call May 29	An Adhoc teleconfere...	Complete	2017-05-29 03:...	190270093...	3	3	0	0	1	15

Displaying 1 - 4 of 4 | Showing 25 | Prev 1 Next | Enter page Go

2 Navigate Multiple Pages of Reports

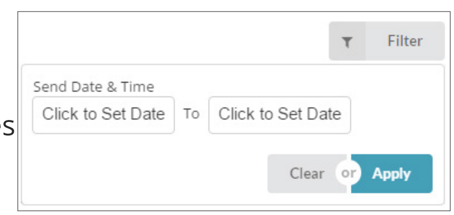
If you have created enough teleconferences, they will be displayed on multiple pages in the Reports Dashboard. To view a teleconference that does not appear on the first page of the list, navigate down to the bottom of your screen where you will find the page numbers indicating the total number of conferences you have created.

Proceed to another page of teleconferences by clicking either the page number you would like to visit, or the Next button which will take you to the next page of conferences. You can also choose how many conferences to display at a time by clicking on the “Showing...” link located to the right of the number of displayed conferences.

3 Search Reports

If you are trying to find a particular teleconference for which to view the report, you can use the search bar located at the top right of the screen above the list of all the reports in the main Instant Teleconference Dashboard. As you type in the name of the teleconference you are searching for, the results will automatically be filtered to show the matches to the typed-in text.

4 Filter Reports



You have the ability to filter your teleconference reports to show conferences from a particular date, at a particular time, or within a certain window of time. **To filter your teleconferences:**

- Find the gray Filter button that is located at the top right-hand side of your screen in the main Instant Teleconference Reporting page, directly above the list of conferences, beside the search bar
- Click the Filter button and a dropdown menu will appear in which you will see two boxes that say Click to Set Date
- Click either box and another dropdown menu will show up with two fields labeled Date and Time in which you can manually insert the date and time you would like to filter teleconference reports from
- Below these fields there is a calendar you can also use to choose the date that you would like to filter reports from
- Click Apply to implement the filter. Or, click Clear if you do not wish to filter your reports, which will close the dropdown menu

5 View Report

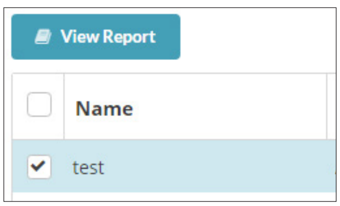
To view the report of a particular teleconference:

- Select the teleconference that you would like to see the report for by checking off the box that appears to the left of the conference's title
- The blue View Report button on top of the teleconference list will be activated and clickable once you have checked of a conference title
- Click the blue View Report button and you will be directed to the report for that particular conference. At the top of the teleconference report, there will be two tabs: Overview and Participants

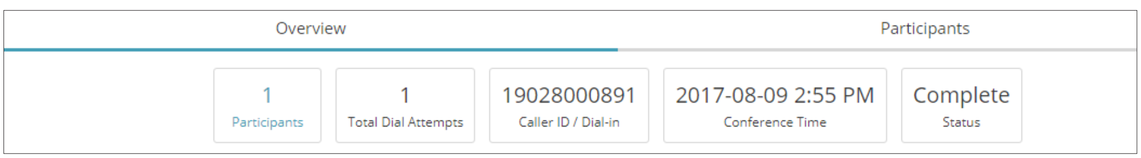
Overview Tab

This section will display five separate boxes at the top of the page with the following information:

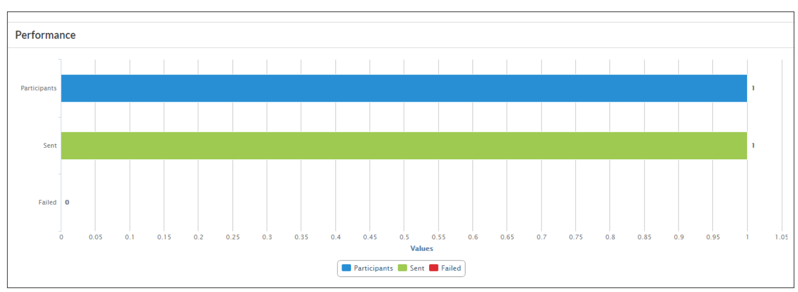
- **Participants:** This box refers to the total number of participants that took part in the teleconference
- **Total Dial Attempts:** This box refers to the total number of dial attempts made by the system during the teleconference



- **Caller ID/Dial-in:** This box refers to the dial-in phone number for the conference, which is also the number that shows up on the participants' caller ID during an instant teleconference
- **Conference Time:** This box refers to the date and time the teleconference began
- **Status:** This box refers to the teleconference's status – either Complete, Editing (draft), or Running (in progress)



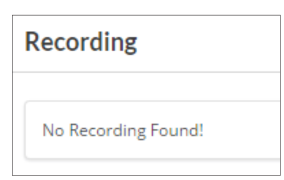
Performance



The second section of the teleconference report, below the five boxes at the top of the page is the Performance section, where you will see a bar graph broken down into the total number of teleconference participants, total number of successful phone numbers dialed, and the total number of failed connections.

At the bottom of the graph there is a legend displaying the color corresponding to each bar of information. By hovering over each colored section of a bar, you will see the total number for each bar.

Recording



At the bottom of the Overview tab in the teleconference report, you will find a section with the recording of the teleconference, if one was created.

This is where you can replay the recording and export it to your device.

If no recording was made, a note saying "No Recording Found" will be in the space instead.

Participants Tab

The second tab appearing at the top of the teleconference report is the Participants tab. By clicking this tab, it will bring you to a page where you can view information about all of the participants who took part in the teleconference.

Upon arriving at this page, you will immediately see a list of all the participants with their information separated into 11 columns:

- **Name:** This column refers to the name of the teleconference participant
- **Number:** This column refers to the phone number of the teleconference participant
- **Email:** This column refers to the email address of the teleconference participant
- **Caller ID:** This column refers to the phone number that was used to connect the participant to the teleconference
- **Dialed At:** This column refers to the date and time that the contact's phone number was first dialed to join the conference
- **Answer Time:** This column refers to the date and time that the participant answered the incoming teleconference call from the system
- **Hang-up Time:** This column refers to the date and time that the participant disconnected from the teleconference
- **Call Duration:** This column refers to the duration of the participant's time as a part of the teleconference in seconds
- **Answered By:** This column refers to whether a human or machine answered the system's dial-out
- **Dial Count:** This column refers to the total number of tries the system made in attempt to connect the participant to the teleconference
- **Last Status:** This column refers to the most recent status of the participant before the teleconference was disconnected (JOINCONF, PRESSONE, ANSWERED, ANNOUNCEMENT, etc.) This is essentially the most recent action they took when a part of the teleconference

Name	Number	Email	Caller ID	Dialed At	Answer Time	Hangup Time	Duration	Answered By	Dial Co...	Last Status
Erin	190229...	erin....	1902800...	2017-08-09 02:55...	2017-08-09 02:50...	2017-08-09 02:50...	9	human	1	DECLINED TO JOIN

Displaying 1 - 0 of 0 | Showing 25 | Prev 1 Next | Enter page Go

Navigate Multiple Participant Pages

If there are enough teleconference participants, they may be displayed on multiple pages in the Participants tab. To view a participant who does not appear on the first page of the list, navigate down to the bottom of your screen where you will find the page numbers indicating the total number of participants. Proceed to another page of participants by clicking either the page number you would like to visit or the Next button, which will take you to the next page of participants. You can also choose how many participants to display at a time by clicking on the "Showing..." link located to the right of the number of displayed participants.

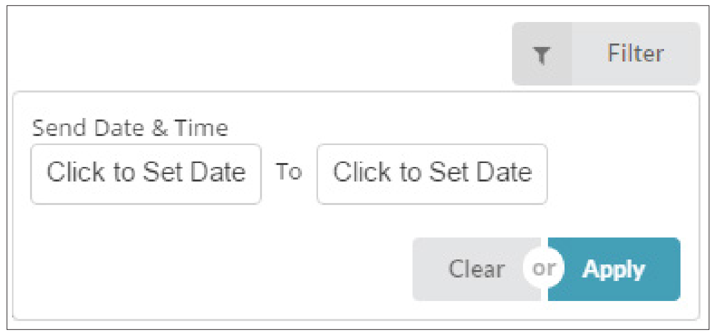
Search Participants

You also have the ability to search through the participants of your report by using the search bar located at the top right-hand side of your screen above the Last Status column in the contact information list.
Click on the search bar to type in the text that you would like to search for in your participants and as you begin typing in the information, the participant list will start to filter automatically to show the matches to the typed text.

Filter Report

You have the ability to filter your teleconference report by Send Date and Time. **To do this:**

- Navigate to the gray Filter button located at the top right-hand side of your screen, next to the blue download button
- Click on the Filter button, a dropdown menu will appear with two fields labeled Click to Set Date
- Clicking on either of these fields will open a dropdown calendar where you can select the dates by which you wish to filter your report
- Click Apply to implement the filter when you have finished selecting your filtered dates
- Or, if you wish to close the dropdown without implementing the filter, click Clear



Once there is a filter in place, the normally gray Filter button will appear green, indicating that a filter is being used. To clear any filters that are in place, click the green Filter button, which will open the dropdown menu, and click Clear to remove the filter.

Download Report

To download the entire teleconference report to your device, there is a blue download button that is located to the right of the Filter button, on top of the Participants tab in the report.

When you click the download button, a dropdown menu will appear giving you the option to download the report in CSV or XLSX format. Choose your desired option and the report will begin to download to your device.

Assignments

1. A case of accidental death occurred at your hospital and you need to get the appropriate staff members on the same page regarding the incident and come up with a strategy on how best to proceed when dealing with the public and the press.

   a) Schedule a teleconference to be held that afternoon, inviting three (3) of your contacts to participate in the call.
   b) Set up a Conference Reminder to be sent out via email and SMS shortly before the teleconference is due to begin.

2. After you have scheduled your teleconference to discuss the case of accidental death, a provincial official arrives at the hospital to oversee the aftermath of the event. Edit your scheduled teleconference to add a new contact (one not already in your Contact Manager) to the list of teleconference invitees.

3. True or False. When recording a live teleconference, each time you press the Record button to stop and start recording, it creates a separate audio file.

4. In the Live Teleconference Dashboard, what is the function of the Mute button?

   a) To prevent the participant from being heard by the rest of the teleconference participants
   b) To prevent the participant from hearing the rest of the teleconference participants
   c) Both of the above

5. What is the advantage of having a teleconference software that is able to dial out to participants as well as allowing them dial in to connect?

Frequently Asked Questions (FAQs)

Because the system is calling us, we don't need to set an appointment in our calendars?

No. Since it is an instant teleconference, participants will be called almost immediately, therefore not requiring an appointment to be made.

If you are muted in the conference, how can you unmute yourself if you wanted to say something?

There is no way to do this at the moment, but we are aware of the feature request.

Is there an ability to create an Outlook appointment for a teleconference?

Not right now, but it is something we can look at. The conference invitation does send out an email in advance of the conference.

How would the software manage a conference with say 250 people?

The Monitor page would scroll, allowing you to see who is on the call.

What happens if there are 100 people on the platform trying to create separate teleconferences at the same time?

Each would have to choose a different dial-in number from a pool of numbers.

What is a safe number of teleconferences per dial-in number?

Only one conference can be designated to a dial-in number at a time.

Is there a way to coordinate teleconference to calendars?

Not at the moment, but it is a feature request.

Can the teleconference system actually send reminders/invitations via a phone call?

Yes, using the text-to-speech function.