IP Office - Job Aid

Conferencing

Summary

This document summarizes the conferencing features currently supported by IP Office. This includes the default conference short codes, using the Conference Rendezvous feature and using Voicemail Pro to route external callers.

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Conferencing on IP Office

Overview

IP Office systems support the following conference capabilities:

Control Unit Conference Capabilities

Note: The term conference party refers to both internal and external callers.

- **IP401:**
  Supports a single 3-way conference.

- **IP403 & IP406:**
  Supports multiple conferences totaling up to 63 parties. For example:
  - 21 x 3-way conferences.
  - 1 x 10-way conference (10 parties) plus 11 x 3-way conferences (33 parties) and free capacity for 20 more conference parties to join new or existing conferences.

- **IP412:**
  Supports multiple conferences totaling up to 126 parties but with no more than 63 parties in any one conference.
  - The IP412 supports two 63 party conference banks. When a new conference is started, the bank with the most free capacity is used for that conference. However once a conference is started on one conference bank, that conference cannot use any free capacity from the other conference bank.

- **Analogue Line Restriction:**
  In conferences that include external analogue line calls, only a maximum of two analogue line calls are supported.

Note: Use of Conference Resources by Other Features

System features such as call intrusion, call recording and silent monitoring all use conference resources. This includes automatic recording if enabled.

When any of these features is active, the number of slots available for conference parties is reduced.

Default Conference Handling

The methods below use the IP Office's default system short codes.

To start/add to a conference:

1. Place your first call or the existing conference on hold. Existing conference parties will still be able to talk to each other.
2. Call the new party.
   - If not answered, or diverted to voicemail, or answered but the party does not want to join the conference; put them on hold and dial ***52** to clear the call.
   - If answered and the other party wants to join the conference, put them on hold and dial ***47**.
3. All held calls are now in conference.
   - Digital display extensions will see **CONF** followed by the conference number.

To exit a conference:

1. Any party wanting to leave a conference can simply hang-up.

Using Conference Rendezvous

Each conference on the IP Office is assigned a conference number. This number is displayed on suitable display phone extensions (eg. Avaya 20, 4400, 4600 and 6400 display phones).

Conference rendezvous allows users to join or start a specific numbered conference. This method of operation allows you to advertise a conference number and then let the individual parties join the conference themselves.

- Note: Conference Rendezvous can create conferences that include only one or two parties. These are still conferences using slots from the IP Office's conference capacity.

Example 1: Rendezvous to any conference

The following example system short code allows any extension to dial *67* and then the number of the conference which they want to join followed by #. For example dialing *67*600# will put the user into conference 600.

- **Short Code:** *67*N#
- **Telephone Number:** N
- **Feature:** Conference Rendezvous

Example 2: Rendezvous to a specific conference number

The following example system short code allows the dialing extension to join a specific conference, in this case 500.

- **Short Code:** *500
- **Telephone Number:** 500
- **Feature:** Conference Rendezvous

If you are asked to add a party to a conference, having a conference rendezvous short code is very useful. With the conference in progress, call the new party. When they answer, hold the call, dial the conference rendezvous short code and then hang-up.

Conferencing with 4400, 4600 and 6400 Series Display Phones

These phones support the following features for conference calls on IP Office.

To add another caller to a call or conference:

1. During the existing call or conference, press **Conf** .
2. Dial the other party.
   - If not answered, end the call either by pressing the **Drop** or **Hold** button, then press **Conf**.
   - When answered, press **Conf** again. Any call that was put on Hold is now conferenced in.

To drop a caller from a conference:.

Note: If the conference only contains four parties (including yourself), using Drop to remove the last caller added will end the whole conference.

1. During the conference, press **Menu** .
2. Using the ◀ and ▶ keys, display and then select **Drop**.

To display calls in a conference:

1. **CONF** on your display indicates that you are in a conference call.
2. Press **Menu** twice.
3. Select **HC&P** (held, conference and parked).
4. The ▼ above **Confs** indicates a conference call. Select **Confs**.
5. Use the ◀ and ▶ keys to see the details of the different callers in the conference.
   - **To remove a caller from the conference:** Select **Drop**.

Note that 4600 series telephones cannot add callers to a conference when working handsfree. They can return to handsfree once they have completed adding a call to the conference.

Conferencing with 20 Series Display Phones

These phones support the following features for conference calls on IP Office.

1. Press **HOLD** to put your first call or the existing conference on hold. Existing conference parties will still be able to talk to each other.
2. Call the new party.
   - If not answered, or diverted to voicemail, or answered but the party does not want to join the conference; put them on hold and dial ***52** to clear the call.
   - If answered and the other party wants to join the conference, press **SCROLL** and then **CONFER**.
4. All held calls are now in conference.

Conferencing with Phone Manager

The IP Office Phone Manager application can be used to setup and control a conference. Even if the conference is started by other methods, the conference parties will appear in the Phone Manager's Conference tab.

1. Make an outgoing call or answer an incoming call.
2. Place the call on hold (click on).
3. Make a call to the required third party (click on).
4. Place that call on hold also (click on).
5. Repeat steps 3 and 4 until all parties required for the conference are on hold.
6. Click on .
7. The **Conference** tab will appear in Phone Manager. This shows you all the conference parties.
8. To remove a caller from the conference, right-click on their entry in the Conference tab and select **Hang Up**.

Conference Recording

- **WARNING**
  The use of call recording is normally subject to local laws and regulations. Before using call recording you must ensure that you have complied with all applicable local laws and regulations. Failure to do so may result in severe penalties.

If your IP Office also has Voicemail Pro installed, then it can support call recording. Call recording can be applied to conference calls and is not controlled by the intrude settings of the internal conference parties.

The Voicemail Pro has an "Advice of Call Recording" setting. If this is enabled, then all parties in the conference will hear a message that the call is being recorded.

Remember that the Voicemail Pro counts as an additional conference party and so requires recording will not work if all conference slots are in use.

To start recording:

- 20 Series display phone users can press **SCROLL** and then **RECORD**.
- 4400 and 6400 Series display phones users can press **Menu** twice, then **Func** and **Recor**.
- Users running IP Office Phone Manager can select **Functions** and then **Record**.
- For other users, a call record shortcode must be setup on the system first. They can then put the conference on hold, dial the shortcode and when recording begins they are returned to the conference.

Conferencing and Voicemail Pro

The Voicemail Pro can be used to route calers into a conference.

Example 1

In this example callers are routed into conference 500.

1. Using IP Office Manager, a new shortcode was created. This code allows callers to indicate the conference they want to join.
   - **Short Code:** *92
   - **Telephone Number:** 500
   - **Feature:** Conference Rendezvous
2. In Voicemail Pro, a new module called ***Conf500*** was created.
3. The following actions were then added to the module.

- The **Check Digits** action forces callers to match a PIN code.
- The **Assisted Transfer** action contains the short code created above. This will place the caller into conference 500 in this example.

4. External callers can be routed to the module by entering its name in an Incoming Call Route or making the module an option in an existing auto attendant call flow.

Example 2

In this example, callers are able to specify the conference they want to join.

1. Using IP Office Manager, a new shortcode was created. This short code allows callers to indicate the conference they want to join. In this example conference 500.
   - **Short Code:** *91*N#
   - **Telephone Number:** N
   - **Feature:** Conference Rendezvous
2. In Voicemail Pro, a new module called ***Conference*** was created.
3. The following actions were then added to the module.

- The **Check Digits** action forces callers to match a PIN code.
- The **Menu** action has been configured to expect 3 digits, indicated by the ***???***.
- The **Assisted Transfer** action uses the short code created above. ***$KEY*** part uses the digits the caller entered in the **Menu** action.

4. External callers can be routed to the module by entering its name in an Incoming Call Route or making the module an option in an existing auto attendant call flow.
5. Adding another short code to the IP Office system lets internal callers also access the call flow.
   - **Short Code:** *90
   - **Telephone Number:** "Conference"
   - **Feature:** Voicemail Collect

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