



Nortel Networks Communication Server 1000

Nortel Networks Integrated Conference Bridge User Guide



Revision history

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Standard 1.00. This document is issued to support Nortel Networks Integrated Conference Bridge Release 4.0.

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Introduction

Nortel Networks Integrated Conference Bridge allows users to schedule and administer multiple, simultaneous conferences using a web, telephone, or Microsoft® Outlook® user interface.

User levels

Nortel Networks Integrated Conference Bridge (ICB) supports the following four user levels:

- **Administrator** — An administrator can set up the ICB card, add one or more users (including super users), and delete one or more users.
- **Super user** — A super user can view and change *any* conference scheduled on the ICB.
- **Executive user** — An executive user can create and modify *their own* conferences. An executive user can also view *any* conference scheduled on the ICB.
- **Regular user** — A regular user can create and modify *their own* conferences. A regular user cannot view or change the conferences of others.

This document describes ICB operations for the super user, executive user, and regular user levels. Administrator operations are described in *Nortel Networks Integrated Conference Bridge Administrator Guide*.

Integrated Conference Bridge interfaces

A conference can be configured on the Nortel Networks Integrated Conference Bridge (ICB) system in the following ways:

- Use the Browser User Interface.
- Use the Microsoft Outlook User Interface.
- Use the Telephone User Interface.

Browser User Interface

The ICB Browser User Interface (BUI) offers one set of configuration options for administrators and a second set for other users.

- For information about BUI options for administrators, refer to *Nortel Networks Integrated Conference Bridge Administrator Guide*.
- For information about BUI options for non-administrators, see “Browser User Interface” on page 11.

Microsoft Outlook User Interface

The Microsoft Outlook User Interface enables users to schedule and manage ICB conferences. The interface includes a subset of the options available in the BUI.

- For information about Microsoft Outlook User Interface options for administrators, refer to *Nortel Networks Integrated Conference Bridge Administrator Guide*.
- For information about Microsoft Outlook User Interface options for non-administrators, see “Microsoft Outlook User Interface” on page 48.

Telephone User Interface

The ICB Telephone User Interface (TUI) lets administrators and other users enter commands on a telephone keypad to configure conferences.

- For information about TUI options for administrators, refer to *Nortel Networks Integrated Conference Bridge Administrator Guide*.
- For information about TUI options for non-administrators, see “Telephone User Interface” on page 71.

Browser User Interface

Accessing the BUI

This section contains instructions on accessing the BUI and changing the user password.

General information

The ICB BUI supports open access from anywhere on the Internet, including gateways and firewalls. The ICB web server is accessed over an Ethernet connection. The system does not support browsers running on Macintosh computers. When using the BUI, do not disable the cookies function in the browsers.

Preparing to use the BUI

1. Check the web browser version.
 - a. Netscape Communicator® users must run version 4.5 or later. To check the version, choose **Help > About Netscape**.
 - b. Microsoft Internet Explorer® users must run version 4.01 or later with Service Pack 1. To check the version, choose **Help > About Internet Explorer**.

To upgrade the web browser, ask your system administrator about the upgrade procedure.

2. Obtain the following information from the ICB administrator:
 - a. your ICB UserID name
 - b. your ICB login password
 - c. the ICB IP address (URL or DNS Name)

Logging in to the BUI

1. Enter the ICB IP address in the browser's **Location** or **Address** field, and press **Enter** or **Return**.

The ICB **Login** window opens. See Figure 1 on [page 12](#).

Note: By default, the **ICB Login** window has a generic image. Administrators can remove or replace this image.

Figure 1: ICB Login window



2. Bookmark this URL for future use.
3. Click **LOGIN**.

The **Network Password** window opens. See Figure 2 on [page 13](#).

Figure 2: Network Password window

Enter Network Password

Please type your user name and password.

Site: 62.90.58.231

Realm: AP Server Check-Point

User Name

Password

Save this password in your password list

OK Cancel

4. Enter your user name in the **User Name** field.
 - To log in as chairperson, enter the chairperson access number (this is the same number the chairperson dials when joining the conference from a telephone).
 - To log in for any other reason (such as to schedule a conference), enter your ICB User Name.
5. Enter your password in the **Password** field.
 - To log in as chairperson, enter the chairperson conference password (this is the same number the chairperson dials when joining the conference from a telephone).
 - To log in for any other reason (such as to schedule a conference), enter your ICB password. To log in the first time, use the default password assigned by your Administrator.
6. Select **Save this password in your password list** (optional).
7. Click **OK**.

Changing the user password

1. Log in to the BUI. See “Accessing the BUI” on page 11.
2. Click **Change Password**.

The **Change Password** window opens. See Figure 3 on [page 14](#).

Figure 3: Change Password window

The screenshot shows a web browser window with the following elements:

- Header:** Nortel Networks logo on the left, "Integrated Conference Bridge" text in the center, and navigation buttons for "Dashboard", "CLI", "Logout", and "Help" on the right.
- Title Bar:** "Change Password" displayed in a blue header bar.
- Form Fields:** Three text input fields labeled "Enter current password:", "New password:", and "Confirm new password:".
- Buttons:** "Submit" and "Cancel" buttons located at the bottom center of the form.

3. Enter the current password in the **Enter current password** field.
4. Enter the new password in the **New password** field.
5. Reenter the new password in the **Confirm new password** field.
6. Click **Submit**.

Conference List window

The home window for the ICB BUI is the **Conference List** window (see Figure 4 on [page 15](#)). Use this window to view scheduled conferences, create a new conference, change passwords, and more.

Figure 4: Conference List window

Integrated Conference Bridge

Patricia McKnight
16 Feb. 2004 17:50

Print Logout Help

Schedule a

Conference List Starting from: 16 Feb 2004 For 7 day(s) GO

Today ◀◀ Previous period Next period ▶▶

Conference on: Feb 16, 2004 - Feb 22, 2004

Conference title	Number of participants	Date	Start time	Duration	Dialing access	Chairperson access	Edit	Delete	Copy	Control
Team meeting	3	Feb 16, 2004	17:30	1:00 hr	1114	1115				
Code review	3	Feb 17, 2004 (R)	16:00	1:00 hr	1114	1115				
Management meeting	4	Feb 18, 2004	14:00	1:00 hr	1114	1115				
Code review	3	Feb 18, 2004 (R)	16:00	1:00 hr	1114	1115				
Code review	3	Feb 19, 2004 (R)	16:00	1:00 hr	1114	1115				

(R) Recurrent conference

(Press Refresh to update the table)

The controls and fields in this window are described in Table 1.

Table 1: Components of Conference List window (Part 1 of 2)

Component	Description
New Conference	Click to set up a new ICB conference.
Change password	Click to change a password.
Conference title	Subject text of the conference. This field can be empty.
Number of participants	Number of ports reserved for this conference.
Date	Conference date. For permanent conferences, the date shows Permanent . For recurrent conferences, (R) follows the date.
Start time	Conference start time. This field is empty for permanent conferences.

Table 1: Components of Conference List window (Part 2 of 2)

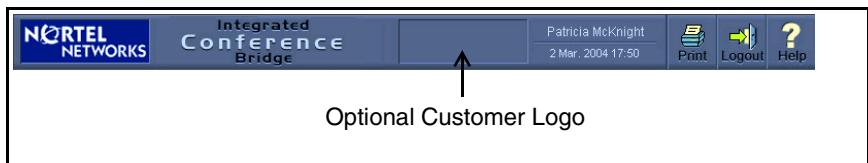
Component	Description
Duration	Conference duration. This field is empty for permanent conferences.
Dialing access	Conference access number (DN).
Chairperson access	Chairperson access number (DN).
Owner	Name of the person who owns the conference. This column appears only for super users, as they can view all conferences. When a super user schedules a conference and enters another user in the Owner field, that user becomes conference owner and that user's name appears here.
Edit	Click the Edit icon (a pencil) to open a window for editing the conference. The window opens with the selected item's parameters. Super users cannot edit; they can only view or control a permanent conference.
Delete	Click the Delete icon (an X) to delete the conference. When clicked, a confirmation dialog box opens. If the conference is active , the following additional line appears before the confirm delete statement: "Warning! This conference is active." Super users cannot edit a permanent conference; they can only view or control a permanent conference.
Copy	Click the Copy icon (pages) to schedule a new conference by copying an existing conference without having to reenter all the detailed information. A window opens with the selected item's parameters. Permanent conferences and "ad hoc" conferences cannot be copied.
Control	Click the Control icon (a gavel) to open the Conference Call Manager window. This icon appears only for conferences currently in progress.

Title frame

The title frame sits at the top of the **Conference List** window and all ICB windows (see Figure 5). It contains the following buttons:

- **Print** — Sends the current window to the printer.
- **Logout** — Terminates the session and returns the user to the ICB Login window (see Figure 1 on [page 12](#)).
- **Help** — Displays help information relevant to the current window. The information is displayed in a separate window.

Figure 5: ICB title frame



Scheduling a one-time conference

You can schedule a one-time conference by:

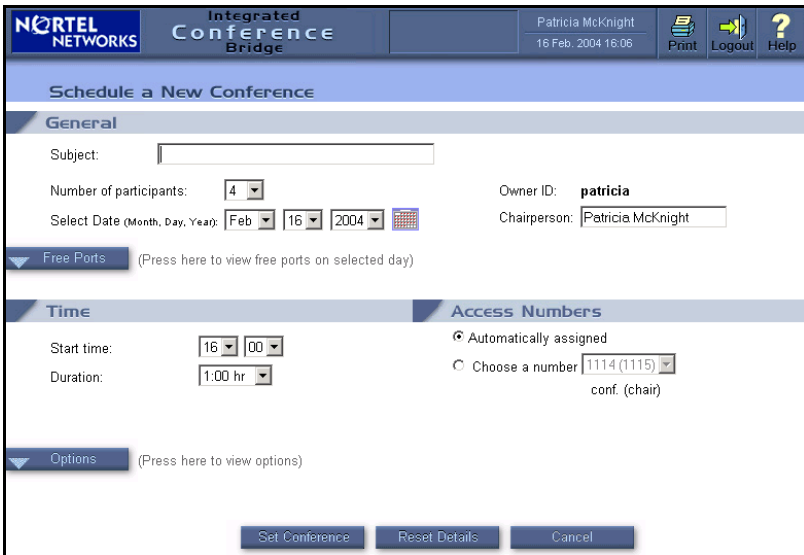
- scheduling a new conference (see “Scheduling a new one-time conference” below), or
- copying an existing conference and changing the parameters as appropriate for the new conference (see “Scheduling a one-time conference by copying and reconfiguring a conference” on page 26).

Scheduling a new one-time conference

1. Log in to the BUI. See “Accessing the BUI” on page 11.
2. Click **New Conference** in the **Conference List** window (see Figure 4 on page 15).

The **Schedule a New Conference** window opens. See Figure 6 on [page 18](#).

Figure 6: Schedule a New Conference window



3. Configure the parameters in the **General** section:
 - a. In the **Subject** field, enter up to 20 characters of text that describes the purpose of the conference (optional). By default, this field is empty.
 - b. In the **Number of participants** field, enter the number of ports reserved for the conference, including chairperson ports. The application ensures that the total number of reserved ports for the time period does not exceed system capacity. The system performs validation after submission. Acceptable values are 3 to 32; the default is 4.
 - c. To determine port availability, click **Free Ports** (optional).

The window expands to show the **Free Ports View** section (see Figure 7 on [page 19](#)). This section shows the ports available for the date selected in the **Select date** field.

Figure 7: Schedule a New Conference – Free Ports View

Schedule a New Conference

General

Subject:

Number of participants: Owner ID: **patricia**

Select Date (Month, Day, Year): Chairperson:

Free Ports View

(Press Refresh for updated resources on selected day)

time:

free ports:

Period: 12:00-00:00

Time

Start time:

Duration:

Access Numbers

Automatically assigned

Choose a number conf. (chair)

(Press here to view options)

- d. Select **Dual meeting**. This link appears only on the primary ICB card in a dual-card set. It is not shown in Figure 6 on [page 18](#). If selected, a **Dual Meeting** window opens. Users can select up to 60 or 62 ports, depending on the value of the **full chairperson control** parameter. The **Access Numbers** section displays a fixed dual-card meeting DN that cannot be changed.
- e. In the **Select date** field, enter the start date for the conference. Valid entries are the current day up to one year ahead of the current day. The default is the current day.

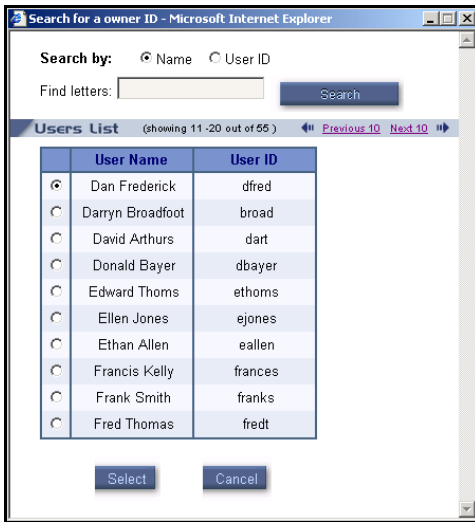
If the BUI application is operating on a Microsoft Windows® operating system, you can alternatively click the **Calendar** icon to open the **Select Date** window (see Figure 8 on [page 20](#)) and select the start date from the calendar.

Figure 8: Select Date window



- f. In the **Owner ID** field, enter the User ID of the person scheduling the conference and who has permission to edit or delete the conference. The field defaults to the User ID of the user logged in to the BUI. When the BUI displays the **User Name** field to a regular user, it cannot be edited. When the BUI displays this field to a super user, the super user can edit it by:
- typing a User ID in the field, or
 - clicking **Search**, which opens the **Search for a owner ID** window (see Figure 9 on [page 21](#)).

Figure 9: Search for a owner ID window



- g. In the **Chairperson** field, enter the name of the chairperson for the user's reference. The default value is the User Name corresponding to the User ID in the Owner ID field, but you can edit it as required. You can enter up to 20 characters.
4. Configure the parameters in the **Time** section:
 - a. In the **Start Time** field, enter the start time for the conference. The minutes box shows 15-minute increments (that is, 0, 15, 30, and 45). The default is the current time and is rounded to the nearest 15 minutes, as follows:
 - In the first 10 minutes of the interval, the system rounds the time to the last 15-minute value. For example, if the time is 8:23, the box shows the time as 8:15.
 - In the last 5 minutes of the interval, the system rounds the time to the future 15-minute value. For example, 8:26 appears as 8:30.
 - b. In the **Duration** field, enter the conference duration. Enter up to 12 hours in 15-minute increments. The selection box shows all possible values. The default is 1 hour.

5. Configure the access numbers in the **Access Numbers** section. Select one of the following options:
 - a. Select **Automatically assigned**. The system automatically selects the DN pair. This is the default option.
 - b. Select **Choose a number**, and select a number pair from the drop-down list. The list contains number pairs in the format: **[conference (chairperson)]**. The system checks the availability of the number when a form is submitted. If the numbers are not available, the scheduling fails.
6. Select **Options** to configure a conference password, a recurring conference, or other general conference options (optional).

The window expands to include three new sections. See Figure 10 on [page 23](#).

Figure 10: Schedule a New Conference – Options

NORTEL NETWORKS Integrated Conference Bridge

Patricia McKnight
16 Feb. 2004 16:09

Print Logout Help

Schedule a New Conference

General

Subject:

Number of participants:

Owner ID: **patricia**

Select Date (Month, Day, Year):

Chairperson:

(Press here to view free ports on selected day)

Time

Start time:

Duration:

Access Numbers

Automatically assigned

Choose a number conf. (chair)

Password

User Password:

- No password
- Automatically assigned password
- Define a password (4 to 8 digits)

Chairperson Password:

- No password
- Automatically assigned password
- Define a password (4 to 8 digits)

Recurrence

Recurrence: Recur Every:

End after: occurrences

(Verify availability of dates)

General Options

Indication for entry and exit:

Language:

Add ports if needed

Keep one port for chairperson

- a. In the **Password** section, create a password for conference participants and the chairperson (optional).
 - i. To create a password that participants use to join the conference, select one of the following options from the **User Password** field:
 - **No password**

- **Automatically assigned password** — The system automatically generates the password. The length of the password is configured by the administrator and can be from 4 to 8 digits.
 - **Choose a password** — Enter a 4- to 8-digit password in this field. The password is displayed in the window as it is entered. The system does not check the password for uniqueness. Different conferences can use the same password.
- ii. To create a password to authenticate the chairperson, select one of the following options from the **Chairperson Password** field:
- **No password**
 - **Automatically assigned password** — The system automatically generates the password. The length of the password is configured by the administrator and can be from 4 to 8 digits.
 - **Choose a password** — Enter a 4- to 8-digit password in this field. The password is displayed in the window as it is entered. The system does not check the password for uniqueness. Different conferences can use the same password.
- b. Configure General Options in the **General Options** section (optional).
- i. In the **Indication for entry and exit** field, define how the system indicates the entry or exit of a participant. Select one of the following options from the drop-down list:
- Play name on entry and name on exit
 - Play name on entry and tone on exit
 - Play tone on entry and tone on exit
 - Silence (no indication for entry or exit)
- ii. In the **Language** field, select the language the system uses for voice prompts. The drop-down list offers the languages available in the system. When using single-number access, the selected language takes effect after the caller enters the

conference ID and password. Otherwise, the system uses the default language.

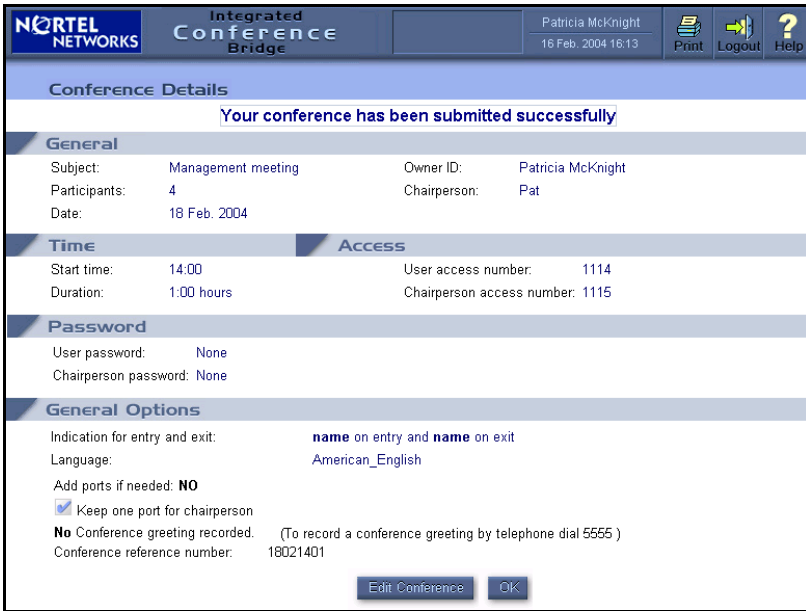
- iii. Select **Add ports if needed** to have the system reserve additional ports to accommodate unanticipated participants. The system adds ports only if available (that is, if they are not reserved for another conference).
- iv. Select **Keep one port for the chairperson** to reserve a port for the chairperson. If this option is not selected, the system makes ports available on a first-come, first-serve basis. In this case, if all the ports are in use when the chairperson tries to join the conference, the system does not allow the chairperson to enter the conference.

7. Click **Set Conference** to save the conference.

After the conference details are saved, the **Conference Details** window opens (see Figure 11 on [page 26](#)). This window displays conference details and options in the same layout as the **Schedule a New Conference** window.

Use the Conference reference number, shown in the **General Options** section, when recording a conference-specific greeting. See “Recording a conference-specific greeting” on page 77.

Figure 11: Conference Details window for a one-time conference



8. Do one of the following:
 - Click **OK** to return to the **Conference List** window.
 - Click **Edit Conference** to make any changes to the conference (see “Editing a conference (one-time or recurring)” on page 31).

Scheduling a one-time conference by copying and reconfiguring a conference

The reconfiguring of an existing conference to create a new conference is not the same as editing an existing conference. When reconfiguring a copied conference to create a new conference, all parameters can be changed as necessary. When editing an existing conference, only some parameters can be changed.

Steps

1. Log in to the BUI. See “Accessing the BUI” on page 11.

2. Click the **Copy** icon (pages) for the conference you are copying in the **Conference List** window (see Figure 4 on page 15). The **Schedule a New Conference** window opens (see Figure 6 on [page 18](#)), with all the parameters of the selected conference.
3. Configure the parameters as appropriate for the new conference. Refer to steps 3 to 6 in “Scheduling a new one-time conference” on page 17 for instructions on configuring and reviewing the parameters.
4. Click **Set Conference** to save the new conference.

After the conference is saved, the **Conference Details** window opens (see Figure 11 on [page 26](#)). The window displays conference details and options in the same layout as the **Schedule a New Conference** window.

Use the Conference reference number, shown in the **General Options** section, when recording a conference-specific greeting. See “Recording a conference-specific greeting” on page 77.

5. Do one of the following:
 - Click **OK** to return to the **Conference List** window.
 - Click **Edit Conference** to make any changes to the conference (see “Editing a conference (one-time or recurring)” on page 31).

Scheduling a recurrent conference

The **Recurrence** section does not appear for dual-card meetings because they do not support the recurrence option.

The recurrence option is available only when a user selects a specific DN pair in the **Access Numbers** section of the **Schedule a New Conference** window (see Figure 6 on [page 18](#)). If a DN pair is not selected, a dialog box opens saying the DN pair must be selected first.

You can schedule a recurrent conference by:

- scheduling a new conference (see “Scheduling a new recurring conference” on page 28), or
- copying an existing conference and reconfiguring the parameters as appropriate for the new conference (see “Scheduling a recurring conference by copying and reconfiguring a conference” on page 30).

Scheduling a new recurring conference

1. Log in to the BUI. See “Accessing the BUI” on page 11.
2. Select **New Conference** in the **Conference List** window (See Figure 4 on page 15).

The **Schedule a New Conference** window opens. See Figure 6 on [page 18](#).

3. Enter standard conference details as outlined in “Scheduling a new one-time conference” on page 17.

Note: In the **Access Numbers** section, select **Choose a Number** and select a DN pair.

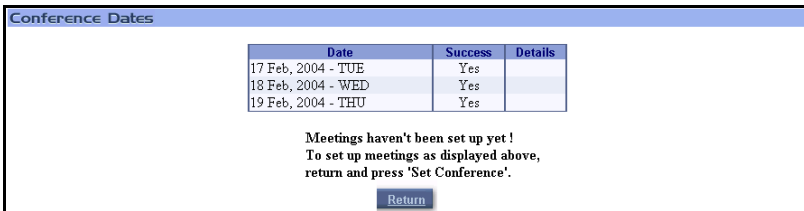
4. Configure recurrence parameters.
 - a. Select **Options** in the **New Conference** window.

The **Options** panel opens. See Figure 6 on page 18).
 - b. Select **Recurrence** in the **Recurrence** section. This enables the recurrent parameters.
 - c. In the **Recur Every** field, select the recurrence interval from the drop-down list. Available values are:
 - working day
 - day
 - week
 - two weeks
 - month

Note: If the first conference is not a working day, the working day option is not available.

- d. In the **End After** field, define the number of conference occurrences. Up to 52 occurrences can be defined, but they cannot be more than a year in advance.
- e. Click **Verify** to verify port availability without actually setting up the conferences.

The **Conference Dates** window opens, which indicates if each recurrence is available or not. See Figure 12 on [page 29](#).

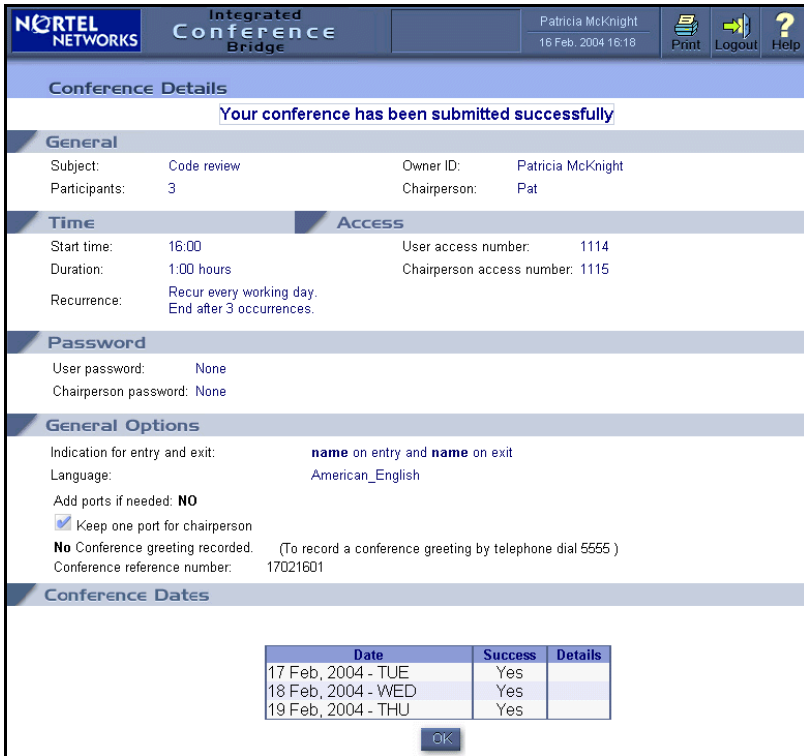
Figure 12: Conference Dates window

5. Click **Return** to return to the **Schedule a New Conference** window, and adjust the recurrence parameters if necessary.
6. Click **Set Conference**.

After the conference details are saved, the **Conference Details** window opens (see Figure 13 on [page 30](#)). This window displays conference details and options in the same layout as the **Schedule a New Conference** window. Use the Conference reference number, shown in the **General Options** section, when recording a conference-specific greeting. See "Recording a conference-specific greeting" on page 77.

The **Conference Dates** section lists the scheduled dates for the conference, including the first date specified in conference details. The window also displays the success result for each date specified in the recurrence criteria. Successful occurrences are booked. In the case of a failure, the occurrence is not booked and the reason for the failure given. For example, the DN may be in use or the number of available ports may be insufficient.

Figure 13: Conference Details window for a recurring conference



7. Click **OK**.

Scheduling a recurring conference by copying and reconfiguring a conference

Follow the steps below to schedule a new recurring conference by copying an existing conference and reconfiguring its parameters as appropriate.

1. Log in to the BUI. "Accessing the BUI" on page 11.
2. Click the **Copy** icon (pages) for the conference you are copying in the **Conference List** window (see Figure 4 on page 15). The **Schedule a New Conference** window opens (see Figure 6 on page 18), with all the parameters of the selected conference.

3. Configure the standard conference parameters as appropriate for the new conference. See steps 3 to 6 of “Scheduling a new one-time conference” on page 17 for instructions on configuring the parameters.

Note: In the **Access Numbers** section, select **Choose a Number** and select a DN pair, if not already selected

4. Configure the recurrence parameters as appropriate for the new conference. Refer to step 4 in “Scheduling a new recurring conference” on page 28.
5. Click **Set Conference**.

After the conference details are saved, the **Conference Details** window opens (see Figure 13 on [page 30](#)). This window displays conference details and options in the same layout as the **Schedule a New Conference** window. Use the Conference reference number, shown in the **General Options** section, when recording a conference-specific greeting. See “Recording a conference-specific greeting” on page 77.

The **Conference Dates** section lists the scheduled dates for the conference, including the first date specified in conference details. The window also displays the success result for each date specified in the recurrence criteria. In the case of a failure, the system indicates the reason. For example, a failure can result because the DN is in use or the number of available ports may be insufficient.

6. Click **OK**.

Editing a conference (one-time or recurring)

The following fields cannot be modified when editing a conference:

- date
- dual-card meeting option (a single-card conference cannot be made dual)
- recurrent option

An active conference can be edited, but only the following fields can be changed:

- number of participants
- duration
- addition of ports as needed (under the **Options** section)

Steps

1. Log in to the BUI. See “Accessing the BUI” on page 11.
2. Click the **Edit** icon (a pencil) for a scheduled conference in the **Conference List** window (See Figure 4 on page 15).

The **Edit Conference** window opens (see Figure 14). It is similar to the Schedule New Conference window, except certain fields, such as date, cannot be edited.

Figure 14: Edit Conference window

The screenshot shows the 'Edit Conference' window in the Nortel Networks Integrated Conference Bridge. The interface includes a header with the Nortel Networks logo, the title 'Integrated Conference Bridge', and user information for Patricia McKnight. The main content area is divided into sections: 'General', 'Time', and 'Access Numbers'. The 'General' section contains fields for Subject (Management meeting), Number of participants (4), Selected Date (18 Feb. 2004), Owner ID (patricia), and Chairperson (Pat). There are also buttons for 'Free Ports' and 'Options'. The 'Time' section has fields for Start time (14:00) and Duration (1:00 hr). The 'Access Numbers' section has a 'Choose a number' dropdown set to 1114 (1115) and a label 'conf. (chair)'. At the bottom, there are buttons for 'Set Conference', 'Reset Details', and 'Cancel'.

3. Edit conference details as outlined in “Scheduling a new one-time conference” on page 17 (and “Scheduling a new recurring conference” on page 28 if applicable).
4. Click **Set Conference** to save the changes.

After the conference details are saved, the **Conference Details** window opens (see Figure 11 on [page 26](#)). This window displays conference details and options in the same layout as the **Schedule a New Conference** window.

5. Click **OK**.

Deleting a conference

You can delete any conference that you have scheduled, even if it is in progress. Recurring conferences can be completely (all current and future occurrences) or partially (individual occurrences) deleted.

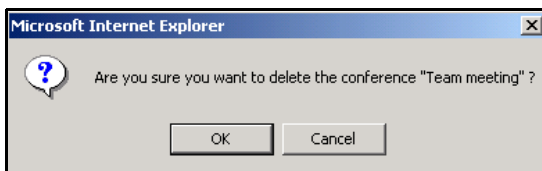
Super users can delete any one-time and recurring conference, regardless of who scheduled the conference.

Administrators can delete any conference, including permanent conferences.

Steps

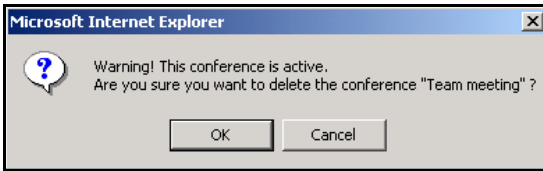
1. Log in to the BUI. See “Accessing the BUI” on page 11.
The **Conference List** window opens. See Figure 4 on [page 15](#).
2. Click the **Delete** icon (X) for the conference to be deleted.
This opens a confirmation dialog box (see Figure 15 and Figures 16 and 17 on [page 34](#)).
3. Do one of the following:
 - If the conference is a one-time conference and has not started, click **OK** in the confirmation dialog (see Figure 15).

Figure 15: Delete confirmation – one-time inactive conference



- If the conference is a one-time conference and has started, click **OK** in the confirmation dialog (see Figure 16 on [page 34](#)).

Figure 16: Delete confirmation – one-time active conference



- If the conference is a recurring conference, respond to the confirmation dialog (see Figure 17) as follows:
 - Click **Selected Instance Only** to delete only this occurrence of the recurring conference.
 - Click **Include Following** to delete only this and future occurrences of the recurring conference.

Figure 17: Delete confirmation – recurring conference



Managing a conference in progress

Tasks for managing a conference

Table 2 on page 35 lists the various tasks used to manage the conference and indicates if a chairperson must be present. This section describes each task.

Table 2: Managing a conference – tasks (Part 1 of 2)

Tasks	Chairperson present	Chairperson not present
Managing the conference: <ul style="list-style-type: none"> Lengthening the conference Locking or unlocking the conference Session management — holding a voting session Session management — holding a question-and-answer session 	 	
Changing the status of the chairperson: <ul style="list-style-type: none"> Muting or unmuting the chairperson Stopping or resuming music Adjusting the volume of the chairperson Releasing chairperson control 	 	
Managing the status of all participants: <ul style="list-style-type: none"> Counting and announcing all participants Muting all participants Disconnecting all ports Examining port status Dialing out and returning with or without the called party 	 	

Table 2: Managing a conference – tasks (Part 2 of 2)

Tasks	Chairperson present	Chairperson not present
Managing the status of individual participants:		
• Adding details for an individual participant	✓	✓
• Consulting between chairperson and participant	✓	
• Muting or unmuting individual participant(s)	✓	✓
• Playing the name of individual participants	✓	✓
• Disconnecting an individual participant	✓	✓
• Adjusting the volume of an individual participant	✓	✓

Dual-card meeting

In a dual-card meeting, the commands that a chairperson implements from the BUI apply to participants in both cards. The following features are available in a dual-card conference:

- **Dial-out to a specified number** — dial-out uses a port on the secondary card, if no port is available on the primary card.
- **Consult with participant** — the chairperson can consult with participants on the secondary card.
- **Play name** — this feature works with participants on both cards. The system plays the name on the chairperson’s desktop, not on the telephone.

Conference Call Manager window

All of tasks listed in Table 2 on page 35 are performed from the **Conference Call Manager** window. Figure 18 on [page 37](#) shows the window when a chairperson is present. Figure 19 on [page 38](#) shows the window when a chairperson is not present.

Figure 18: Conference Call Manager – Chairperson present

Conference Call Manager Team meeting Time left: 0:48:54

Conference Add 15 minutes Lock Session management

Chairperson Mute Stop Music Volume Control

Active chairperson: the number is unavailable Release (Release Chairperson Control)

Participants Count & announce Mute all Disconnect all

(3 attending - 3 invited)

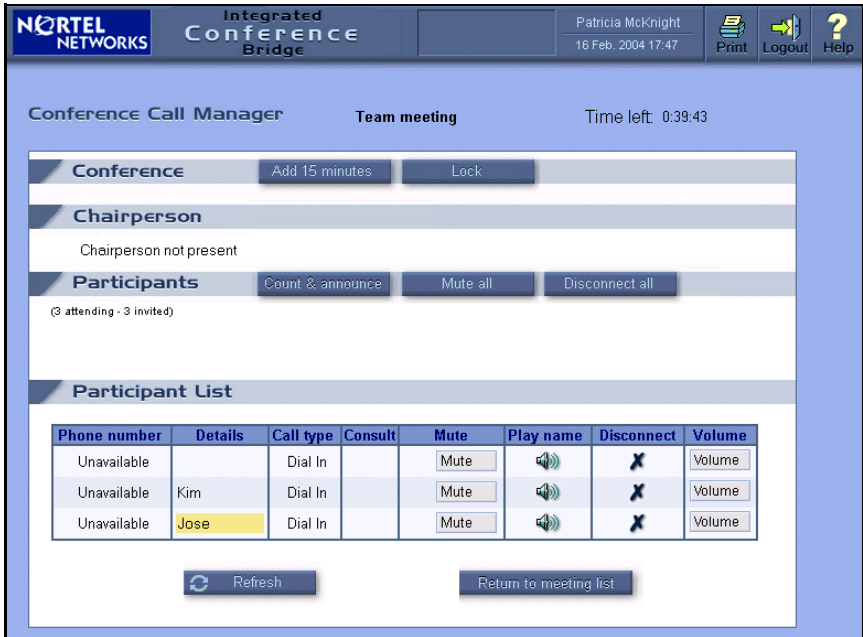
Add a Participant:
 Add a Group:
 Call assistant
 (enter a phone number or choose a group and press "Dial")

Participant List

Phone number	Details	Call type	Consult	Mute	Play name	Disconnect	Volume
Unavailable	Kim	Dial In	<input type="text" value="Consult"/>	<input type="button" value="Mute"/>		<input type="button" value="X"/>	<input type="text" value="Volume"/>
Unavailable	Jose	Dial In	<input type="text" value="Consult"/>	<input type="button" value="Mute"/>		<input type="button" value="X"/>	<input type="text" value="Volume"/>

Note: When the **Conference Call Manager** is accessed from Microsoft Outlook (see “Editing a conference” on page 67), the BUI title frame does not appear.

Figure 19: Conference Call Manager – Chairperson not present



The BUI permits only one active **Conference Call Manager** window per conference. The chairperson’s access number identifies the associated voice port.

The time remaining in the conference is displayed in the **Time left** field in the upper right-hand corner of the **Conference Call Manager** window.

If the chairperson is present, the **Active Chairperson** field in the **Chairperson** section shows:

- the CLID of the conference, if the CLID is available and the chairperson dials in to join the conference. If the CLID is not available, the window displays **Active chairperson: the number not available**.
- the called number, if the chairperson dials out to join the conference. This is part of the Acquire Chairperson Control feature.

If a chairperson is not present, the **Chairperson** section displays **Chairperson not present**.

The **Participant List** section contains several information fields. The **Phone number** field shows the CLID or called number. The **Call Type** field shows regular, dial-out, or expand. The current speaker is shown by a highlight in the **Details** field.

The **Conference Call Manager** window is updated automatically every two minutes and can be refreshed manually by clicking **Refresh**.

The **Conference Call Manager** window can be accessed in one of three ways:

- In the **Login** window (Figure 1 on [page 12](#)), enter the conference access number and chairperson password for the active conference.
- In the **Conference List** window (Figure 4 on [page 15](#)), click the **Control** icon (a gavel) for an active conference. (The icon appears only while the conference is active.)
- In the Microsoft Outlook User Interface window, select the **Control** button in the ICB form while the conference is active. Refer to “Microsoft Outlook User Interface” on page 48 for information about the Microsoft Outlook interface.

Managing the conference

This section describes how to perform tasks from the **Conference** section of the **Conference Call Manager** window (see Figure 18 on [page 37](#)).

Note: If a chairperson is not present on the conference, the session management activities (voting session and question-and-answer session) are not available (Figure 19 on [page 38](#)).

Lengthening the conference

To lengthen the conference by 15 minutes, click **Add 15 minutes** at any time during the conference. If successful, the system updates the “Time Left” indication.

Locking or unlocking the conference

Click **Lock** at any time during the conference to prevent any more participants from joining. To unlock the conference, click **Unlock**. The

button text toggles between **Lock** and **Unlock**, depending on the state of the conference.

Session management — holding a voting session

Only the conference chairperson can run a voting session.

1. Click **Session Management**.

The window expands to show a Session Management panel. See Figure 20.

Figure 20: Conference Call Manager – Session Management panel

Conference Call Manager Team meeting Time left: 0:46:19

Conference Add 15 minutes Lock

Session Management

Voting

Start voting

Question

Start Questions

Close

Chairperson Mute Stop Music Volume Control

Active chairperson: the number is unavailable Release (Release Chairperson Control)

Participants Count & announce Mute all Disconnect all

(3 attending - 3 invited)

Add a Participant:

Add a Group: 1.yuval

Call assistant

(enter a phone number or choose a group and press "Dial")

Participant List

Phone number	Details	Call type	Consult	Mute	Play name	Disconnect	Volume
Unavailable	Kim	Dial In	<input type="text" value="Consult"/>	<input type="button" value="Mute"/>	<input type="button" value="Speaker"/>	<input checked="" type="checkbox"/>	<input type="text" value="Volume"/>
Unavailable	Jose	Dial In	<input type="text" value="Consult"/>	<input type="button" value="Mute"/>	<input type="button" value="Speaker"/>	<input checked="" type="checkbox"/>	<input type="text" value="Volume"/>

2. Click **Start Voting**.

The button text changes to **End Voting**.

3. Enter the subject of the vote in the voting subject field.
4. Ask the participants to vote.

The participants use their telephone keypads to register their votes: *81 for Yes, *82 for No, or *83 for Abstain. The results are displayed in the Voting panel.

5. Click **End Voting**.

The final results are displayed in the Voting panel, and also e-mailed to the chairperson. The button text changes back to **Start Voting**.

Note 1: If the participant leaves the conference during the voting session, the participant's vote is cancelled and not counted.

Note 2: If a participant votes more than once, only the participant's last vote is counted.

Session management — holding a question-and-answer session

A question-and-answer session can be used in a lecture-type conference, where participants may want to address questions to the chairperson.

Only the conference chairperson can run a question-and-answer session.

1. Click **Mute All**.
2. Click **Session Management**.

The window expands to show a Session Management panel. See Figure 20 on [page 40](#).

3. Click **Start Questions**.

The button text changes to **End Questions**.

4. Ask the participants for questions.

Participants who have questions press *85 on their telephone keypads. Question requests are shown in the **Participant list** as follows:

- blinking '?' icon — question request not answered
- steady '?' icon — question request answered

- no '?' icon — no question request

To cancel the question request, the participant presses *86.

5. Click the ? icon in the header row of the **Participant list** to sort the list so that those participants who are asking questions appear first in the list (optional).
6. Click **Unmute** in the **Participant List** or click the blinking '?' icon.
The participant asks his or her question.
7. Click **End Questions** to end the session when all questions have been answered, or when the allotted time is over.

The button text changes to **Start Questions**.

Changing the status of the chairperson

This section describes how to perform tasks from the **Chairperson** section of the **Conference Call Manager** window (see Figure 18 on [page 37](#)).

Note: If a chairperson is not present on the call, none of these activities is available (see Figure 19 on [page 38](#)).

Muting or unmuting the chairperson

Click **Mute** to deactivate the chairperson's voice port. Click **Unmute** to activate it. The button text toggles between **Mute** and **Unmute**, depending on the state of the voice port.

Stopping or resuming music

Click **Stop Music** to stop music playing when only one person is present in the conference. Click **Resume Music** to resume the music. The button text toggles between **Stop Music** and **Resume Music**.

Adjusting the volume of the chairperson

Only the chairperson can adjust the chairperson's volume. Follow the steps below to adjust the incoming (hearing) and/or outgoing (speaking) volume for the chairperson.

1. Click **Volume Control**.

The **Volume Control** panel opens (see Figure 21 on [page 43](#)). The two scales in the middle of the **Volume Control** panel show the increase/decrease level for hear and talk directions. The middle of the scale is zero, which indicates no volume change.

Figure 21: Conference Call Manager – Chairperson Volume Control

The screenshot shows the 'Volume Control' panel in the Conference Call Manager. The panel includes buttons for 'Add 15 minutes', 'Lock', and 'Session management'. The 'Chairperson' section has 'Mute' and 'Stop Music' buttons. The 'Active chairperson' section shows 'the number is unavailable' and a 'Release' button. The 'Volume Control' section features two sliders: 'HEAR (how you hear the conference):' and 'TALK (how others hear you):'. A 'Reset Volume of all participants' button is located below the sliders. The 'Participant List' table is shown below the volume control section.

Phone number	Details	Call type	Consult	Mute	Play name	Disconnect	Volume
Unavailable	Kim	Dial In	Consult	Mute	🔊	✗	Volume
Unavailable	Jose	Dial In	Consult	Mute	🔊	✗	Volume

2. Click an arrow to increase or decrease volume. The colored rectangle in the scale advances one step for each arrow click.
3. Click **Reset Volume of all participants** to restore the volume level for all participants (optional).

Releasing chairperson control

Click **Release** to release chairperson control. This button releases both BUI and TUI control. The **Conference Call Manager** window closes.

Managing the status of all participants

This section describes how to perform tasks from the **Participants** section of the **Conference Call Manager** window (see Figure 18 on [page 37](#)).

Note: If a chairperson is not present on the conference, the Dial-out activity is not available (see Figure 19 on [page 38](#)).

Counting and announcing all participants

Click **Count and announce** to announce the total number of participants, followed by the participants' names as recorded in the name entry.

Muting all participants

Click **Mute all** to silence all participants except the chairperson. To unmute all participants, click **Unmute All**. The button text toggles between **Mute all** and **Unmute All**.

Individual participants can still be unmuted or muted (see “Muting or unmuting individual participant(s)” on [page 46](#)) while the conference is in **Mute all** state. **Mute all** takes precedence, but **Unmute all** restores all participants to their individual states - muted or unmuted.

Disconnecting all ports

Click **Disconnect all** to disconnect all participants except the chairperson.

Examining port status

The first line in the **Participants** section shows the number of participants attending (ports in use) and the number of participants invited (number of ports reserved).

Dialing out and returning with or without the called party

Follow the steps below to make a private call outside of the conference. Only the chairperson can initiate the call.

1. Select the type of call, as follows:
 - Select **Add a Participant** to make a call to an individual.

- Select **Add a Group** to make a call to a group. Call-out groups are configured by the administrator.
 - Select **Call Assistant** to use a Call Assistant to make the call. The number of the Call Assistant is configured by the administrator.
2. Enter the call parameter, as follows:
 - If **Add a Participant** was selected in step 1, type the number to be dialed in the text box. The number may contain digits, asterisks (*), and number sign (#). If required, enter a pause anywhere by entering 'p' for a 100 ms pause or 'P' for a 500 ms pause.
 - If **Add a Group** was selected in step 1, select a group from the list.
 3. Click **Dial**.

After call origination, the chairperson is engaged in a private call. All buttons in the **Chairperson** section are disabled, as are **Count & Announce** and **Mute All** in the **Participants** section.

4. Return to the conference as follows:
 - Click **Return with called party** to end the private call and return to the conference with the called party. The new participants join the conference and are added to the **Participant List**. A dialog box opens if no ports are available for dial-out, in the case of a single or group call, and the participants are not added to the call. If some, but not all, of the required ports are available for a group call, no dialog box opens.
 - Click **Return without called party** to end the private call and return to the conference. The called party is not added to the conference.

Managing the status of individual participants

This section describes how to perform tasks from the **Participant's List** section of the **Conference Call Manager** window (see Figure 18 on page 37).

Note: If a chairperson is not present on the conference, the Consult activity is not available (see Figure 19 on page 38).

Adding details for an individual participant

Type any text in the **Details** field for a participant. For example, the text can be a name to uniquely identify the participant.

Consulting between chairperson and participant

Click **Consult** to hold a private call with an individual participant. Only the chairperson can initiate the call. Click **End consultation** to end the private call and return both parties to the conference. The button text toggles between **Consult** and **End consultation**.

Muting or unmuting individual participant(s)

Click **Mute** to mute an individual participant. Click **Unmute** to unmute the individual. The button text toggles between **Mute** and **Unmute**.

Playing the name of individual participants

Click the **Play name** icon (a speaker) to play the participant's name as recorded by the name entry feature. The name plays on the chairperson's desktop, not on the telephone.

Disconnecting an individual participant

Click the **Disconnect** icon (an X) to disconnect a participant.

Adjusting the volume of an individual participant

Follow the steps below to adjust the outgoing (speaking) and/or incoming (hearing) volume for an individual participant.

1. Click **Volume** for the individual participant.

The **Volume Control** panel opens (see Figure 22 on [page 47](#)). The two scales in the middle of the **Volume Control** panel show the increase/decrease level for hear and talk directions. The middle of the scale is zero, which indicates no volume change.

Figure 22: Conference Call Manager – Participant Volume Control

The screenshot shows the 'Participant List' section of the Conference Call Manager. It features two volume control sliders: 'HEAR (how participant hears the conference):' and 'TALK (how others hear participant):'. Both sliders have a blue bar indicating the current volume level. Below the sliders are buttons for 'Close', 'Apply to all', and 'Reset Volume of participant'.

Phone number	Details	Call type	Consult	Mute	Play name	Disconnect	Volume
Unavailable	Kim	Dial In	Consult	Mute			
Unavailable	Jose	Dial In	Consult	Mute			Volume

Below the table is a 'Refresh' button.

2. Click an arrow to increase or decrease volume. The colored rectangle in the scale advances one step for each arrow click.
3. Click **Reset Volume** to restore the original volume level for the participant (optional).
4. Click **Apply to all** to set the volume level of all participants to these settings (optional).

Microsoft Outlook User Interface

Overview

Nortel Networks Integrated Conference Bridge (ICB) integrates Microsoft Outlook Calendar's Appointment and Meeting functionality to enable users to schedule ICB conferences with Microsoft Outlook.

Note: The Microsoft Outlook Calendar shows only conferences scheduled and modified in the Microsoft Outlook ICB scheduling interface. It does not show new conferences scheduled or modified directly in the Browser User Interface (BUI) or Telephone User Interface (TUI).

System requirements

The Microsoft Outlook User Interface requires the following versions of Microsoft Outlook and Microsoft Exchange:

- Microsoft Outlook version 2000 or later
- Microsoft Exchange version 5.5 or later

Contact your system administrator for instructions on upgrading your system.

Microsoft Outlook settings

ICB conferences are configurable in 15-minute increments, and start and end on the quarter-hours (:00, :15, :30, and :45). To take full advantage of these capabilities, Nortel Networks recommends that you configure your Microsoft Outlook Calendar with 15-minute increments, following the steps below.

Steps

1. Open Microsoft Outlook.
2. Click **Calendar** in the **Folder List**.
3. If your Calendar view is set to Week or Month, click **Day** in the Tool bar to display the time scale on the left of the Calendar.

- Right-click in the time scale on the left of the Calendar.
- Choose **15 Minutes**.

The time scale now displays in 15-minute increments.

ICB form

Audio-conference details are added to a Microsoft Outlook meeting or appointment using the ICB form. This form is the ICB tab in the Appointment or Meeting window in Microsoft Outlook (see Figure 23 on page 49).

Figure 23: ICB form

The screenshot shows the 'ICB' tab of a Microsoft Outlook appointment window. The window title is 'Untitled - icb - User Defined'. The menu bar includes 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', 'Actions', and 'Help'. The toolbar contains 'Save and Close', 'Print', 'Recurrence...', and 'Invite Attendees...' buttons. The form has three tabs: 'Appointment', 'ICB' (selected), and 'Attendee Availability'. The 'ICB' tab contains the following fields and controls:

- ICB Address:** A text box containing 'http://62.90.58.231' and a dropdown arrow.
- Owner Id:** An empty text box.
- Chairperson:** An empty text box.
- ICB Conference**
- Start:** A text box containing 'Mon 16/02/2004 8:00 AM'.
- Duration:** A text box containing '30 minutes'.
- Number of participants:** A text box with a dropdown arrow.
- Free Ports:** A button.
- Access Numbers:** A section with two radio buttons:
 - Automatically assigned**
 - Choose a Number** (with a dropdown arrow)
- Options:** A button.

ICB files

The ICB form is based on the following ICB files:

- form file required for all ICB applications — icbf.oft

- language files, one or more required for each ICB application:
 - icbsjc.oft — for the Japanese and Chinese languages
 - icbsk.oft — for the Korean language
 - icbs.oft — for all other languages

Getting started

To use the ICB form for the first time, go to “Publishing the ICB files” below.

To upgrade the ICB form, go to “Upgrading the ICB form” on page 55.

Publishing the ICB files

ICB files must be published in Microsoft Outlook before the user can configure the ICB form as the default Calendar form in Microsoft Outlook.

Nortel Networks recommends that the Microsoft Outlook administrator publish the ICB files in the Organizational Forms folder (refer to *Nortel Networks Integrated Conference Bridge Administrator Guide*). However, if the ICB files are not published by the Microsoft Outlook administrator, each user wishing to use the form must publish the ICB files in the Personal Forms Library by following the steps below.

Steps

Note 1: Do not perform this procedure if the ICB files have already been published by the Microsoft Outlook administrator.

Note 2: These instructions are specific to Microsoft Exchange 5.5. For other systems, contact your Microsoft Outlook administrator for specific instructions on publishing a form.

1. Obtain the ICB files (form file icbf.oft and one or more language files icbs.oft, icbsjc.oft, and icbsk.oft) from the ICB Administrator.
2. Save the files in an accessible location.
3. For each language file (icbs.oft, icbsjc.oft, and icbsk.oft) you are publishing:
 - a. Double-click the name of the file, for example **icbs.oft**.

Note: Click **No** if asked to **Enable macros**.

- b. Click **OK** in the **Select Folder** window.

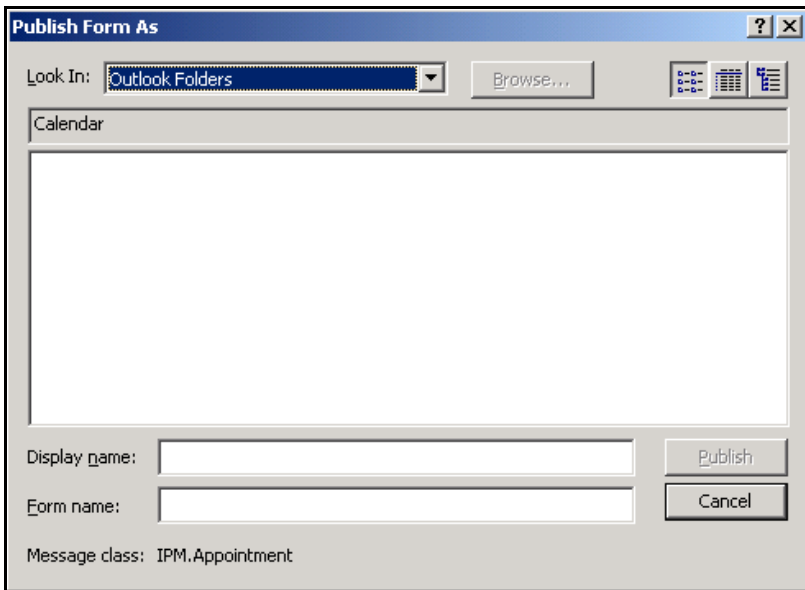
Note: Do not select a folder from the folder list in the **Select Folder** window.

The **Calendar** window opens.

- c. Choose **Tools > Forms > Publish Form As**.

The **Publish Form As** window opens. See Figure 24.

Figure 24: Publish Form As window



- d. Select **Personal Forms Library** in the **Look In** field.
- e. Enter a **Display name** and **Form name** as follows:
- If you are publishing icbs.oft, enter **icbs**.
 - If you are publishing icbsjc.oft, enter **icbsjc**.
 - If you are publishing icbsk.oft, enter **icbsk**.
- f. Click **Publish**.

Note: Click **Yes** if asked to replace an existing form.

The **Choose Form** window opens.

6. Select the library in which the files were published:
 - If you published the forms yourself, select **Personal Forms Library** in the **Look In** field.
 - If the ICB administrator published the files, select **Organizational Forms Library** in the **Look In** field.
7. Select the form name and click **Open**.
8. Click **OK**.
9. Verify that you are using the correct version of the ICB form.
 - a. Double-click a timeslot in the **Calendar**.
 - b. Choose **Help > About this Form** from the toolbar.

The form version is displayed.

You are now ready to schedule ICB conferences in Microsoft Outlook.

Removing ICB files from the Personal Forms Library

When searching for published ICB files, Microsoft Outlook searches first in the Personal Forms Library, then in the Organizational Forms Library. If upgraded ICB files exist in the Organizational Forms Library, and older versions in the Personal Forms Library, the new upgraded ICB files will never be used.

If necessary, ask the ICB administrator to remove any ICB files from the Organizational Forms Library. Follow the steps below to remove previously published ICB files from the Personal Forms Library.

Steps

1. Open Microsoft Outlook.
2. Right-click **Calendar** in the **Folder List**.
3. Choose **Properties**.

The **Calendar Properties** window opens.

4. Select the **Forms** tab.

5. Click **Manage**.

The **Forms Manager** window opens.

6. Click **Set** in the left half of the window.

The **Forms Manager** window has two **Set** buttons. The one on the right is inactive.

7. Select **Personal Forms** in the **Forms Library**.

8. Click **OK**.

9. Select the ICB form(s) to be deleted from the list in the panel on the left side of the window.

10. Click **Delete**.

11. Click **Yes** in the confirmation dialog box.

12. Click **Close** to close the **Forms Manager** window.

13. Click **OK** to close the **Calendar Properties** window.

After you remove an ICB form, the Microsoft Outlook Appointment form becomes the default Calendar form. See “Adding the ICB form as the default Calendar form” on page 52 to set another ICB form as the default Calendar form.

Resetting the default Calendar form for Microsoft Outlook

Follow the steps below to change the default Calendar form back to the Microsoft Outlook Appointment form.

Steps

1. Open Microsoft Outlook.

2. Right-click **Calendar** in the **Folder List**.

3. Choose **Properties**.

The **Calendar Properties** window opens.

4. Select the **General** tab.

5. Select **Appointment** in **When posting to this folder, use**.

6. Click **OK**.

Upgrading the ICB form

The ICB administrator will notify you if the ICB form has been upgraded and published.

Follow the steps below to obtain, publish, and install the upgraded ICB form as the default Calendar form.

Steps

1. Remove the current default form. Follow the steps in “Removing ICB files from the Personal Forms Library” on page 53.
2. If the ICB administrator has not published the form, follow the steps in “Publishing the ICB files” on page 50 to publish the form in the Personal Forms Library.
3. Set the new upgraded form as the default Calendar form. Follow the steps in “Adding the ICB form as the default Calendar form” on page 52.
4. Clear the Microsoft Outlook forms cache, following the steps in “Clearing the Microsoft Outlook forms cache”.
5. Schedule a test meeting to ensure the upgrade was successful. Follow the steps in “Scheduling a new conference” on page 61.

Clearing the Microsoft Outlook forms cache

1. Open Microsoft Outlook.
2. Choose **Tools > Options**.
The **Options** window opens.
3. Select the **Other** tab.
4. Click **Advanced Options**.
The **Advanced Options** window opens.
5. Click **Custom Forms**.
The **Options** window opens.
6. Click **Manage Forms**.
The **Forms Manager** window opens.
7. Click **Clear Cache**.

If no **Clear Cache** button is available, you must delete the forms cache file manually, following the steps in “Deleting the forms cache file manually” on page 56.

8. Click **Close** to close the **Forms Manager** window.
9. Click **OK** to close the **Options** window.
10. Click **OK** to close the **Advanced Options** window.
11. Click **OK** to close the **Options** window.

Deleting the forms cache file manually

Some versions of Microsoft Outlook 2000 may not have a **Clear Cache** button. In this case, you must delete the forms cache file manually, following the steps below.

1. Close Microsoft Outlook.
2. Go to the folder where the forms cache file is located.
 - If you are using User Profiles, go to
C:\Windows\Profiles\\Local Settings\
Application Data\Microsoft\Forms
 - If you are not using User Profiles, go to
C:\Windows\Local Settings\Application Data\Microsoft\Forms
3. Delete the file **Frmcache.dat**.

ICB form errors

When scheduling a new conference, you may receive one of the following error messages:

- ICB Outlook form not found
- ICB Outlook forms versions mismatch

To fix the problem:

- Clear the Microsoft Outlook forms cache by following the steps in “Clearing the Microsoft Outlook forms cache” on page 55.

- Check that the files were published correctly and publish the forms again, if necessary.
 - If you published the forms yourself, refer to “Publishing the ICB files” on page 50.
 - If the Microsoft Administrator published the forms, consult him or her.

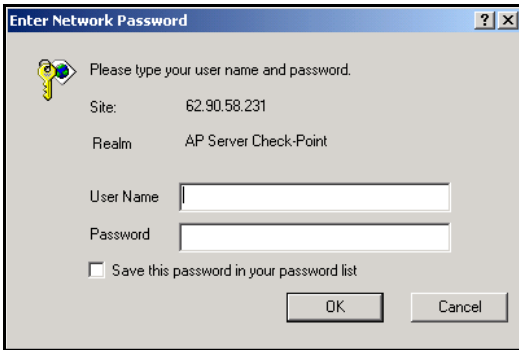
Logging in to ICB

You only have to log in to ICB when you are setting up or editing the ICB parameters of a conference. Use the same ICB User ID and password for the ICB form in Microsoft Outlook that you use for the BUI. If you have access to more than one ICB card, you must have a User ID defined for each card.

Steps

1. If you are not already at the ICB tab, go to the ICB tab as follows:
 - a. Select **Calendar** from the **Folder List** in Microsoft Outlook.
 - b. Click **New**.
 - c. Select the **ICB** tab.
 - d. Select the ICB card from the **ICB Address** drop-down list.
 - e. Select **ICB Conference**.
2. Enter your user name and password in the **Enter Network Password** window (see Figure 25 on [page 58](#)).
 - a. Enter your User ID in the **User Name** field.
 - b. Enter your password in the **Password** field.
 - c. Select **Save this password in your password list** (optional).
 - d. Click **OK**.

Figure 25: Enter Network Password window

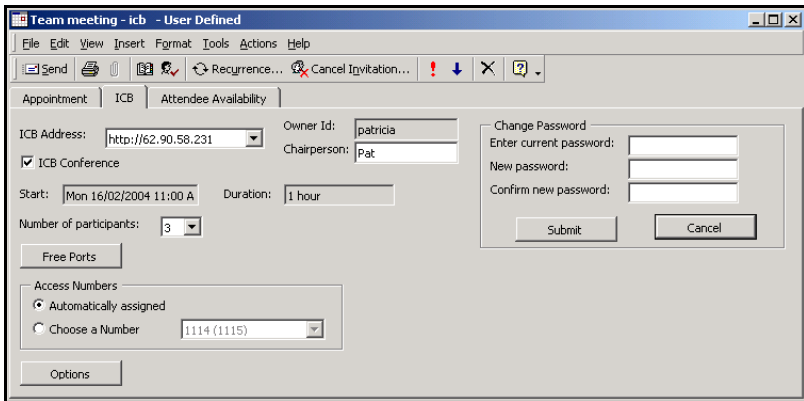


Changing the ICB password

1. Log in to the **ICB form**. See “Logging in to ICB” on page 57.
2. Click **Change Password**.

The window expands to include a **Change Password** section. See Figure 26.

Figure 26: ICB form – Change password



3. In the **Change Password** section:
 - a. Enter your current password in the **Enter current password:** field.
 - b. Enter your new password in the **New password:** field.

- c. Confirm your new password in the **Confirm new password:** field.
4. Click **Submit**.

Adding access to a different ICB card

1. Open Microsoft Outlook.
2. Select **Calendar** from the **Folder List**.
3. Click **New**.
4. Select the **ICB** tab.
5. Enter the URL or DNS Name of the new card in the **ICB Address** field.
6. Select **ICB Conference**.
7. Log in to the new ICB card. See “Logging in to ICB” on page 57.
8. Click **Save and Close**.

The next time you open the ICB form, this card will appear in the **ICB Address** drop-down list.

Renaming an ICB card

To make it easier to identify ICB cards in the **ICB Address** drop-down list in the ICB form, you can give each card a more meaningful name. For example, you can call the ICB card located at your head office “Head Office”.

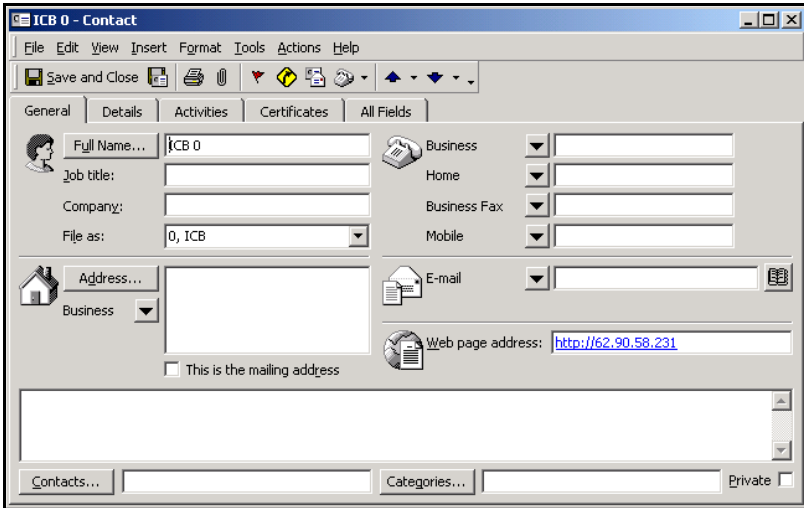
Steps

1. Open Microsoft Outlook.
2. Expand the **Calendar** folder in the **Folder List**.
The **ICB Cards** sub-folder appears in the **Folder List**.
3. Select the **ICB Cards** sub-folder.
4. Double-click the ICB card to be renamed.

The **Contact** window for that ICB card opens. See Figure 27.

You can also use this step to verify which card you are renaming, by checking the URL given in the **Web page address** field in this window.

Figure 27: Contact window – ICB card



5. Enter the new name for the card in the **Full Name** field.
6. Click **Save and Close**.

Scheduling a conference

An ICB conference is set up in Microsoft Outlook similar to a non-ICB conference. The conference date, time, and subject is defined in the normal Microsoft Outlook GUI, and then the ICB resources are added to it.

You set up a conference by:

- scheduling a new one (see “Scheduling a new conference” on page 61), or
- modifying a past conference to start at a future time and changing its parameters appropriately (see “Modifying a past conference to start in the future” on page 66).

Scheduling a new conference

1. Select **Calendar** in the **Folder List** in Microsoft Outlook.
2. Click and drag in the Calendar to select a timeslot for the conference (optional).
3. Create a new conference by doing one of the following:
 - Double-click in the Calendar. This does not preserve any timeslot set in step 2.
 - Click **New**.

Note: Click **Yes** if asked to **Enable macros**.
 - Right-click the Calendar and choose **New Appointment** or **New Meeting Request** from the menu.
 - Choose **File > New > New Appointment** or **New Meeting Request**.

The **Appointment** or **Meeting** window opens.

4. In the **Appointment** tab:
 - a. Enter the subject of the conference in the Subject field.
 - b. Enter the start and end time of the conference in the **Start time** and **End time** fields, if not already entered in step 2.

Conferences can start or end only on quarter-hours (that is 0, 15, 30, 45). ICB does not support any other time increments.

If you double-clicked in the Calendar to open this window (in step 3), the timeslot may not have been preserved. Reenter the time if necessary.

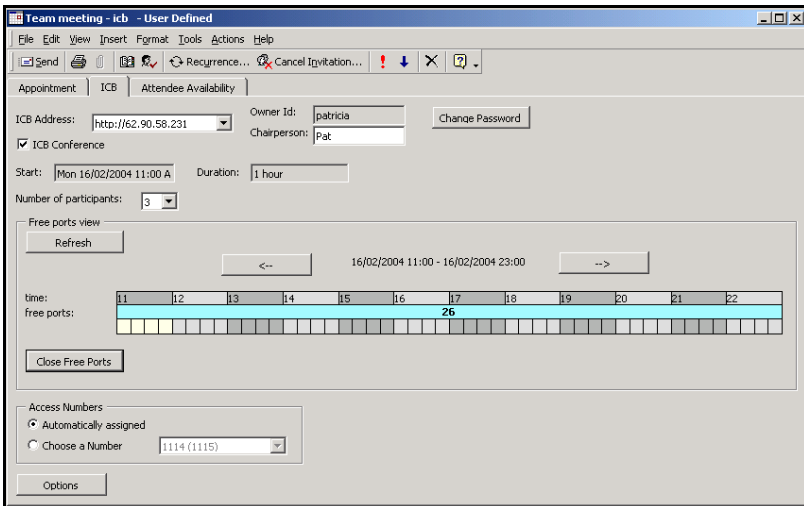
- c. Identify the conference participants, as follows:
 - If **New Appointment** was selected in step 3, click **Invite Attendees**, and select them from your address book.
 - If **New Meeting Request** was selected in step 3, enter the participants' names, either by listing them in the **To:** field (separated by semicolons), or by clicking **To:** and selecting them from your address book.
5. In the **ICB** tab:
 - a. Select an ICB card from the **ICB Address** drop-down list.

If no ICB card is listed in the **ICB Address** list, type the IP address or DNS Name of an ICB card (as provided by the ICB administrator) in the **ICB Address** field.

- b. Select **ICB Conference**.
- c. Log in to ICB. See “Logging in to ICB” on page 57.
- d. Edit the name in the **Chairperson** field (optional).
- e. Enter the number of participants. The default is 4.
- f. Click **Free Ports** (optional).

The window expands to show the availability of free ports (see Figure 28).

Figure 28: ICB form – Free ports



- g. Configure the access numbers in the **Access Numbers** section (optional for one-time conferences.) Select *one* of the following options:
 - Select **Automatically assigned**. The system automatically selects the DN pair.
 - Select **Choose a Number**, and select a number pair from the drop-down list. The list contains number pairs in the format: **[conference (chairperson)]**. The system checks the

availability of the number when a form is submitted. If the numbers are not available, the scheduling fails.

If you are scheduling a recurring conference, you must select **Choose a Number**.

- h. Select **Options** to configure a password for the conference chairperson and other participants and for other general conference options (optional).

The window expands to include three new sections. See Figure 29 on [page 63](#).

Figure 29: ICB form – Options

The screenshot shows the 'Team meeting - icb - User Defined' dialog box. The 'Options' section is expanded, revealing several sub-sections:

- Access Numbers:**
 - Automatically assigned
 - Choose a Number (with a dropdown menu showing '1114 (1115)')
- Options:**
 - User Password:**
 - No Password
 - Automatically assigned password
 - Define a password (with an input field and '(4 to 8 digits)')
 - Chairperson Password:**
 - No Password
 - Automatically assigned password
 - Define a password (with an input field and '(4 to 8 digits)')
- General Options:**
 - Indication for entry and exit:
 - Language:
 - Add port if required
 - Keep one port for chairperson

Buttons for 'Free Ports', 'Change Password', and 'Close Options' are also visible.

- i. To create a password for participants to use to join the conference (optional), select one of the following options from the **User Password** section:
 - **No password**
 - **Automatically assigned password** — The system automatically generates the password. The length of the password is configured by the administrator and can be from 4 to 8 digits.
 - **Define a password** — Enter a 4- to 8-digit password in this field. The password is displayed in the window as it is entered. The system does not check the password for uniqueness. Different conferences can use the same password.
- ii. To create a password to authenticate the chairperson (optional), select one of the following options from the **Chairperson Password** section:
 - **No password**
 - **Automatically assigned password** — The system automatically generates the password. The length of the password is configured by the administrator and can be from 4 to 8 digits.
 - **Choose a password** — Enter a 4- to 8-digit password in this field. The password is displayed in the window as it is entered. The system does not check the password for uniqueness. Different conferences can use the same password.
- iii. Configure **General Options** (optional).
 - In the **Indication for entry and exit** field of the **General Options** section, define how the system announces the entry or exit of a participant. Select one of the following options from the drop-down list:
 - Play name on entry and name on exit
 - Play name on entry and tone on exit
 - Play tone on entry and tone on exit
 - Silence (no indication for entry or exit)

- In the **Language** field, select the language the system uses for voice prompts. The drop-down list offers the languages available in the system. The default is the ICB card's default language. When using single-number access, the selected language takes effect after the caller enters the conference ID and password. Before that, the system uses the default language.
 - Select **Add port if required** to have the system reserve additional ports to accommodate unanticipated participants. The system adds ports only if available (that is, if they are not reserved for another conference).
 - Select **Keep one port for the chairperson** to reserve a port for the chairperson. If this box is not selected, the system makes ports available on a first-come, first-serve basis. In this case, if all the ports are in use when the chairperson tries to join the conference, the system does not allow the chairperson to enter the conference. By default, this option is enabled.
6. To set up a recurring conference, select **Recurrence** and set up the recurrence parameters using the recurrence functionality in Microsoft Outlook.

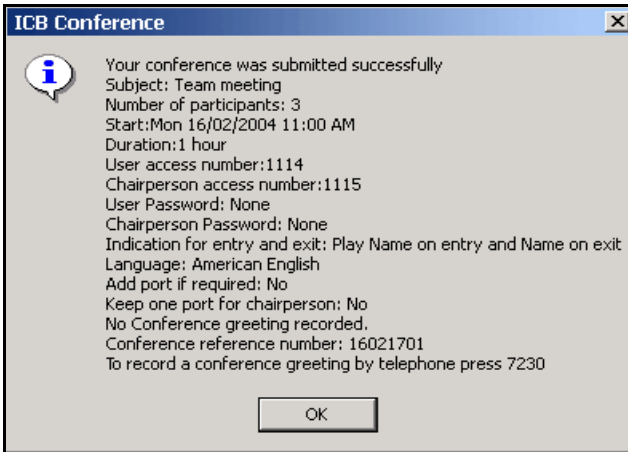
Do not schedule more than 52 occurrences of a recurring conference. If you need to schedule more than 52 occurrences, schedule a separate recurring conference with the additional occurrences.

Do not schedule any occurrence of a recurring conference more than one year in advance. All occurrences of a recurring conference with one or more occurrences scheduled more than one year in advance will not be saved.

7. Select **Save and Close** for an appointment, or select **Send** for a meeting.

If the scheduling is successful (that is, all resources are available), ICB scheduling is updated automatically. A window opens showing the conference parameters, including access numbers and passwords (see Figure 30 on [page 66](#)). Conference and access information is e-mailed to the invited parties and added to their Microsoft Outlook calendars.

Figure 30: Scheduling success message and conference information



If all resources are not available for a one-time conference, a dialog box opens and the conference is not saved. You must re-create the conference with different parameters, such as a different ICB card (if more than one is equipped), fewer ICB ports, or a different time and/or date.

All occurrences of a recurring conference are booked in Microsoft Outlook whether the resources are available or not. However, only those occurrences that are successful (that is, all resources are available) are booked in ICB.

All occurrences of a recurring conference will not be saved in ICB and Microsoft Outlook if either of the following conditions is true:

- the conference has more than 52 occurrences, or
- the conference has one or more occurrences scheduled more than a year in advance.

8. Click **OK**.

Modifying a past conference to start in the future

The start time and date of a past conference with ICB resources can be modified to start in the future. ICB allocates resources as if a new conference is scheduled.

Follow the steps in “Editing a conference before it begins” on page 67 to change the start date and time of a past conference, then edit the other parameters to set up the “new” conference.

Editing a conference

An ICB conference can be edited before it begins or while it is in progress.

Editing a conference before it begins

When a conference is edited before it begins, all the conference parameters except the ICB card and Owner ID can be changed.

Steps

1. Open Microsoft Outlook to the **Calendar** view.

You can change the conference date, start time, duration, and/or subject in this view, as follows:

- Select a conference, and drag it to a new date or time.
- Click and move the top or bottom edge to change the duration.
- Click the subject and overwrite it.

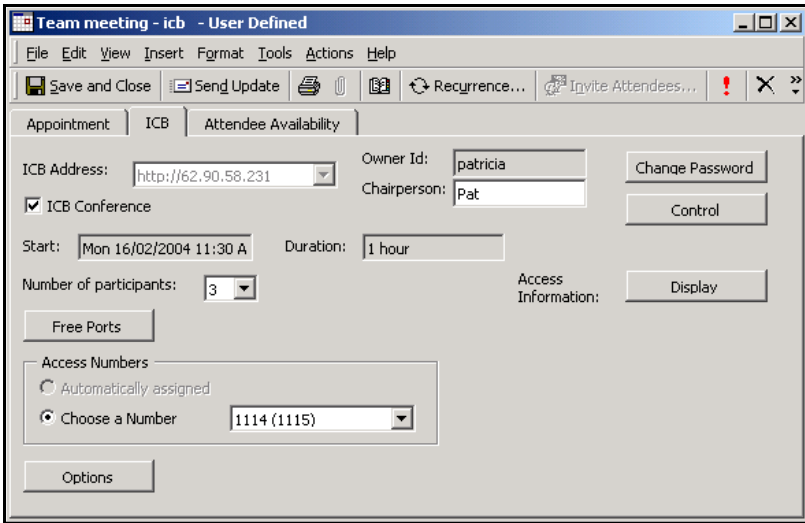
These items can also be changed in the Appointment tab, as described in step 3 on [page 68](#).

2. Open the conference by doing one of the following:
 - Double-click the conference.
 - Right-click the conference and select **Open** from the menu.
 - Select the conference, and select **File > Open > Selected Items** from the Microsoft Outlook tool bar.

A window opens showing the details of the conference (see Figure 31 on [page 68](#)). A conference that was created as an ICB conference opens automatically with the ICB form. A regular Microsoft Outlook meeting opens with the standard Microsoft Outlook meeting form.

You cannot convert a regular Microsoft Outlook meeting to an ICB conference.

Figure 31: ICB form – Edit conference

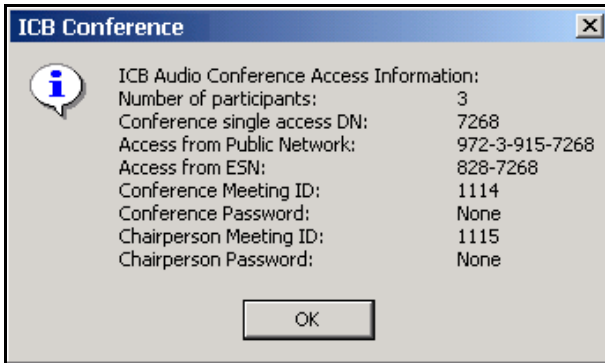


3. Edit the parameters as required (see “Scheduling a new conference” on page 61):
 - Edit ICB parameters in the **ICB** tab.
 - The **ICB Address** and **Owner ID** fields cannot be edited.
 - Edit the normal Microsoft Outlook conference parameters, such as **Start:** and **Duration**, in the **Appointment** tab. These parameters can also be changed directly in the **Calendar** view.
 - Add or remove participants, if required. Any changes may cause additional invitations to be e-mailed.
 - Edit the recurrence parameters, if required, by clicking **Recurrence**.
4. In the **ICB** tab. do any of the following:
 - Click **Change Password** to change the password (optional). See “Changing the ICB password” on page 58.
 - Click **Control** to open the BUI **Conference Call Manager** window (optional). See “Conference Call Manager window” on page 36 for details on this window.

- Click **Display** to view the audio conference access information (optional). See Figure 32.

If prompted to log in to ICB, follow the steps in “Logging in to ICB” on page 57.

Figure 32: Audio Conference Access Information



5. Click **Save and Close** to submit the changes.

If the modifications are successful, that is, if all resources are available, ICB scheduling is updated automatically. A window, similar to Figure 30 on [page 66](#), displays conference information.

If all resources are not available, the changes to a one-time conference are not saved. Changes to a recurring conference are saved in Microsoft Outlook, but only successful changes (that is, when resources are available for a given occurrence) are saved in ICB.

6. Click **Send Updates** to update the Calendars of invited parties (optional).
7. Click **OK**.

Editing a conference while it is in progress

When a conference is edited while it is in progress, only the conference duration, number of ports, and the “Additional port if needed” option can be edited.

Follow the steps in “Editing a conference before it begins” on page 67 to edit a conference while it is in progress.

Deleting a conference

1. Open Microsoft Outlook to the **Calendar** view.
2. Select the conference to be deleted.
3. If you are using Microsoft Office 2000 and the conference has no attendees, do the following:
 - a. Clear the **ICB Conference** check box in the ICB form.
 - b. Click **Save and Close**.

This deletes the conference from ICB in this particular case.

4. Delete the conference by doing one of the following:
 - Press **Control-D** on the keyboard.
 - Click the **Delete** icon (an X).
 - Right-click the conference and choose **Delete** from the menu.
 - Choose **Edit > Delete**.

If the conference has no attendees, this deletes the conference.

5. If the conference has attendees:
 - a. Select one of the following:
 - **Send cancellation and delete meeting** — Deletes the conference from ICB and Microsoft Outlook for all participants.
 - **Delete without sending a cancellation** — Deletes the conference from your Microsoft Outlook Calendar only. The conference remains in the other participants' Calendars and in ICB.

This option allows users to schedule conferences for other people without including themselves. To do so, a user can schedule a conference for someone else, then remove himself or herself as a participant.

- b. Click **OK**.

Telephone User Interface

Overview

The Nortel Networks Integrated Conference Bridge provides a Dual Tone Multi-Frequency (DTMF), menu-driven Telephone User Interface (TUI). The TUI enables the chairperson and conferees to initiate commands during an active conference (for example, to mute a caller).

A separate service enables booking a conference by using the telephone's keypad. Also, a conference owner can record a conference-specific greeting, or an administrator can record a system greeting. Dial a unique DN to access the TUI service, then schedule a conference or record a greeting by following the voice menu's instructions.

To use the TUI scheduler, enter a TUI user name and password.

Scheduling a conference

When a port is reserved for the TUI, $x-1$ ports are available for the conference, where x is the total number of ports in the card. After a conference is scheduled using the TUI, the conference can be viewed, modified, or deleted using the Browser User Interface (BUI).

The conference defined from the TUI has default attributes. When prompted by a voice menu, insert the conference parameters through the telephone keypad. The ICB plays messages when an error is made.

Note: You have up to seven minutes to schedule a conference with the TUI. After seven minutes, the ICB plays a voice message indicating that the allocated time is over. The ICB then disconnects the call.

The ICB sets up the following default attributes:

- entry and exit by name
- no custom greeting
- no conference expansion

- no name for the name of the conference
- no name for the name of the chairperson

If a second user dials the TUI DN when the TUI is in use, the ICB plays a voice message announcing that the port is in use.

Steps

1. Dial the TUI DN.
2. Log in to TUI:
 - a. Enter your TUI user name followed by *.
 - b. Enter your TUI password followed by *.
3. Set the date of the conference.
 - To schedule a conference for today, press **1**.
 - To schedule a conference for a specific day:
 - i. Press **2**.
 - ii. Enter the date. Enter two digits for the day, two digits for the month, and four digits for the year, followed by *. For example, enter **11032004*** for a conference on March 11, 2004.
4. Set up the conference.
 - a. Enter the start time of the conference, in 24-hour format with 15-minute intervals. Enter two digits for the hour (00 to 23) and two digits for the minutes (00, 15, 30, or 45), followed by *. For example, enter **0945*** for a conference starting at 9:45 in the morning.
 - b. Enter the duration of the conference. The conference can be up to 12 hours in duration, measured in 15-minute intervals. Enter two digits for hours (00 to 12) and two digits for minutes (00, 15, 30, or 45), followed by *. For example, enter **0215*** for a conference lasting two hours and 15 minutes.

The system states the number of available ports.
 - c. Enter the number of ports that are needed for the conference, followed by *. For example, enter **5*** to reserve five ports.

5. Do one of the following:
 - Press **1** to continue entering definitions (DNs, password lengths, and language) for the conference.
 - If you are finished defining the conference:
 - i. Press **2**.

The system plays a list of the conference definitions.
 - ii. Go to step 9.
6. Define the Conferee DN.
 - To select a DN:
 - i. Press **1**.

The system plays a list of numbers and corresponding DN's.
 - ii. Enter the number corresponding to the DN you select.
 - To have the system select the DN automatically, press **2**.

The ICB card determines the chairperson DN automatically.
7. Disable passwords or define password lengths.
 - a. For the participant password, do one of the following:
 - Press **0*** for no password.
 - Enter the password length (4 to 8 digits), followed by *****.
 - b. For the chairperson password, do one of the following:
 - Press **0*** for no password.
 - Enter the password length (4 to 8 digits), followed by *****.
8. Select the language for the conference.
 - To select a language other than the default language:
 - i. Press **1**.

The system plays a list of numbers and corresponding languages.
 - ii. Enter the number corresponding to the language you select.
 - To select the default language, press **2**.

The system plays a list of the conference definitions.

9. Do one of the following:

- To confirm the reservation, press **1**.

The ICB sends a confirmation e-mail to you.

- To change any of the conference definitions:

i. Press **2**.

The system plays a list of numbers and corresponding definitions.

ii. Enter the number corresponding to the definition you want to change.

- To repeat the conference definitions, press **3**.

The system plays a list of the conference definitions.

- To input all the conference definitions again, without saving the current definitions, press **4**.

The system restarts the scheduling process, starting with step 3 on [page 72](#).

Acquiring and releasing chairperson control

1. Dial in to the conference as a regular participant.

2. Enter the conference ID.

3. Enter the conference password if configured.

4. To acquire chairperson control, enter ***51**.

- If another chairperson is present at the conference, the command fails. The system notifies the user and returns them to the conference.
- If an active chairperson is not present, the system prompts the user to enter the chairperson password for the conference. If the password is correct, the user becomes the chairperson. If the password is incorrect, the system prompts the user to retry two more times. If the password is still incorrect, the command fails and the system returns the user to the conference.

5. To release chairperson control, enter ***52**. Only the chairperson uses this command.

When activated, the person releasing chairperson control becomes a regular conference participant, allowing someone else to acquire chairperson control.

Using the TUI commands

All commands in the TUI are entered using the telephone keypad. They are listed in “TUI command summary” on page 78.

Using the chairperson TUI commands

The chairperson can use the commands in “Chairperson commands” on page 78 to manage a conference. The chairperson can use the commands for all participants on either card if the ICB is dual-card.

Steps

1. Dial in to the conference as chairperson.
2. At the prompt, enter the conference ID.
3. At the prompt, enter the conference password, if configured.
4. Enter the TUI commands listed in Tables 3 to 5 on [pages 78 to 80](#) as required.

Using the participant TUI commands

Participants can use only those commands listed in Table 6 on page 81 while a call is in progress.

Steps

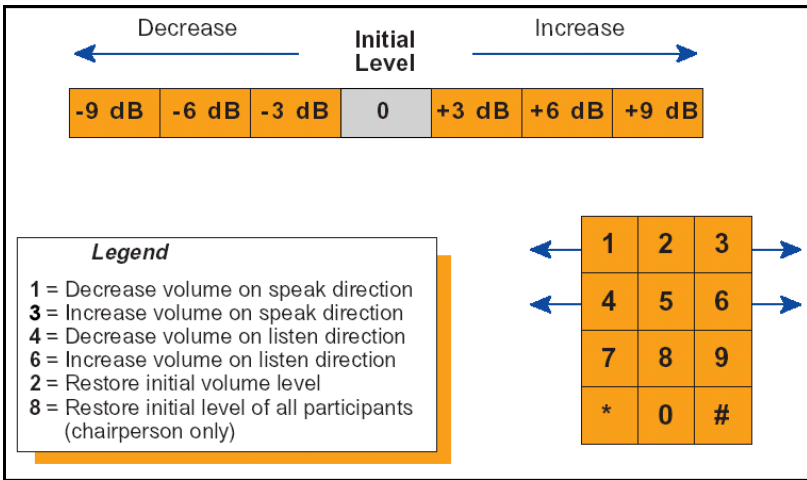
1. Dial in to the conference as a regular participant.
2. At the prompt, enter the conference ID.
3. At the prompt, enter the conference password, if configured.
4. Enter the TUI commands listed in Table 6 on page 81, as required.

Adjusting audio volume

1. Dial in to the conference as chairperson or as a regular participant.
2. Enter the conference ID.
3. Enter the conference password (if configured).
4. Enter *7.

The command *7 accesses the volume control feature. Figure 33 shows how to operate this feature.

Figure 33: Volume control feature operation



When a selection is made, the system applies the command, plays a confirmation tone, and returns the user to the conference.

Each selection of the command advances one step in the required direction. To advance more than one step, the entire sequence must be repeated. For example, to reach the maximum volume in the listen direction, dial: ***76 *76 *76**.

You can interrupt the menu. That is, the two-digit sequence can be entered without waiting for the menu.

Recording a conference-specific greeting

The maximum length of a conference-specific greeting is ten seconds. The system deletes the voice file at the end of the conference, and it cannot be used for other conferences.

Steps

1. Dial the TUI Services DN and log in.
2. Select “Record customer greeting” from the voice menu.
3. At the prompt, enter the reference number of the conference.

When a conference is scheduled using TUI or BUI, the system generates a reference number that uniquely identifies the conference. The system displays this reference number in the BUI (see Figure 11 on [page 26](#) or Figure 13 on [page 30](#)) and in the confirmation e-mail.

The system repeats the number and prompts the user to confirm it or reenter it.

4. Confirm or reenter the number.

The system presents a menu for recording the greeting, similar to that used for the brandline greeting.

After recording the greeting, it can be verified, re-recorded, or deleted at a later time. Conference details displayed in the BUI indicate whether or not a greeting exists.

A greeting recorded for a conference that is part of a recurrent chain applies to all occurrences of the chain.

Creating an “ad hoc” conference

An “ad hoc” conference is a conference that is not scheduled in advance. It uses only card resources (ports and DN) that are available at that time. You can create an “ad hoc” conference only with the TUI.

An “ad hoc” conference is initially 30 minutes in duration, with three ports for participants. You can extend the duration in 15-minute increments by pressing *98. The maximum number of participants is eight, but you can change this limit using the BUI (see “Editing a conference (one-time or recurring)” on page 31).

Use the steps below to create an “ad hoc” conference. Only the chairperson can create the conference.

Steps

1. Set up the conference. The chairperson must:
 - a. Dial the single access number.
 - b. Enter his or her TUI login as the conference ID.
 - c. Enter his or her TUI login password as the conference password.
The TUI login password is the same as the BUI login password.
2. To join the conference, each participant must:
 - a. Dial the single access number.
 - b. Enter his or her TUI login as conference ID. No password is required.

TUI command summary

Chairperson commands

Table 3 lists conference commands that the chairperson can use to control a conference while it is in progress.

Table 3: Chairperson commands (Part 1 of 3)

Command	Description
*0<DN>#	Dial out to a DN, where DN is the called party's directory number. The called party must not be a conference participant. To return to the conference, see Table 4 on page 80.
*0#	Dial out to the Call Assistant.
*#	Redial the last dialed DN.
*2<GN>#	Dial out to a Call-Out Group, where GN is the group number to call.

Table 3: Chairperson commands (Part 2 of 3)

Command	Description
*4	Lock or unlock the conference.
*10	Mute/unmute all ports (toggle).
*19	Mute/unmute self (toggle).
*52	Release chairperson control.
*60	Count conferees and announce names to all participants.
*69	Plays a scrolling list of participants for the chairperson. The chairperson can use this command to access an individual participant. See Table 5 on page 80.
*71	Decrease volume on speak direction.
*72	Restore initial volume level.
*73	Increase volume on speak direction.
*74	Decrease volume on listen direction.
*76	Increase volume on listen direction.
*78	Restore initial volume level of all participants.
*81	Vote: "Yes, I agree".
*82	Vote: "No, I don't agree".
*83	Vote: "I abstain".
*90	Drop all ports except the chairperson's port.
*91	Drop the last dialed-out port.
*92	Drop the last dialed-in port.
*98	Extend the conference duration by 15-minute increments (up to a maximum of 12 hours). Note: This command is not active for a permanent conference.

Table 3: Chairperson commands (Part 3 of 3)

Command	Description
*99	Stop or start the initial conference music, which is possible only when the chairperson is the first person joining the conference. The first entry stops the music, and the second entry starts the music.
*	Cancel current command.
**	Start or stop the Help menu.

Table 4 lists commands available to end a dial-out call (see the command *0<DN># in Table 3 on page 78).

Table 4: Commands to end a dial-out call

Command	Description
*2	Return to the conference with dialed party during dial out.
*3	Return to the conference without dialed party during dial out.

While the system announces the list of conference participants (the command *69 in Table 3 on page 78), the chairperson can use the commands listed in Table 5 to access an individual participant.

Table 5: Chairperson commands – while participant list plays (Part 1 of 2)

Command	Description
#	Stop and start the playlist.
0	Consult privately with the conferee.
1	Mute/unmute the conferee.
2	Play the current conferee name greeting.
4	Select the previous conferee.

Table 5: Chairperson commands – while participant list plays (Part 2 of 2)

Command	Description
6	Select the next conferee.
9	Disconnect the current conferee.
*3	Return to the conference.

Participant commands

Table 6 lists conference commands that a participant can execute on the telephone while the conference is in progress.

Table 6: Participant commands for a conference in progress (Part 1 of 2)

Command	Description
*19	Mute/unmute self (toggle).
*51	Acquire chairperson control.
*71	Decrease volume on speak direction.
*72	Restore initial volume level.
*73	Increase volume on speak direction.
*74	Decrease volume on listen direction.
*76	Increase volume on listen direction.
*81	Vote: "Yes, I agree".
*82	Vote: "No, I don't agree".
*83	Vote: "I abstain".
*85	Ask a question.
*86	Cancel a question.

Table 6: Participant commands for a conference in progress (Part 2 of 2)

Command	Description
*99	Stop or start the initial conference music, which is possible only when the conferee is the first person joining the conference. The first entry stops the music, and the second entry starts it.
*	Cancel current command.
**	Start or stop the Help menu.

Nortel Networks Communication Server 1000

Nortel Networks Integrated Conference Bridge User Guide

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