WELINK CONFERENCING

Installation and User Guide

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WELINK CONFERENCING INSTALLATION AND USER GUIDE

This guide covers the guidelines to be followed when deploying WeLink Conferencing. The User Guide portion provides the end user with basic instructions to follow on using the product. The Installation Guide is intended for System Administrators who will be setting up and managing the WeLink Conferencing hardware and software.

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1 USER GUIDE

Introduction

WeLink Conferencing allows users to have a conference call or a voice meeting over a pre-existing telephone system. Once all the server side configurations have been completed by the system administrator, the person who has the Moderator access code will have the ability to control the different rooms in the conference system. The Moderator can be seen as the conference room's chairperson who has the ability to invite other participants to the conference. The Moderator may also modify different types of settings that are related to the conference rooms such as the recording functions or the background music.

This guide is intended for the end-users of the WeLink Conferencing.

Maximum Number of Participants

There are 3 types of participants within WeLink Conferencing: Moderators, Speakers, and Listeners.

Moderator (Chair): The moderator creates the conference room. The moderator also controls access to the room, who can speak, and when.

Speaker (Attendee): These participants can listen to the conversation, and can contribute through voice input.

Listener: Participants who are listeners can hear what is said, but cannot themselves speak in the room.

WeLink Conferencing supports up to 100 channels (total simultaneous participants) across all rooms.

A single conference room can have up to 100 participants, providing no more than 50 are speakers. All other participants must be listeners only.

For example:

MAXIMUM PARTICIPANTS - ONE ROOM			
Moderator	1	1	1
Speaker	49	25	0
Listener	50	74	99
Total	**100**	**100**	**100**

MAXIMUM PARTICIPANTS - MULTIPLE ROOMS							
Room Number	**1**	**2**	**1**	**2**	**1**	**2**	**3**
Moderator	1	1	1	1	1	1	1
Speaker	10	0	30	9	9	9	9
Listener	39	49	59	0	30	20	20
Total	**100**		**100**		**100**		

There is no limit to the number of conference rooms that can be created, providing the total number or participants from all rooms does not exceed 100.

Access Codes (Logging into Conference Server)

WeLink Conferencing can have multiple rooms active by default. Your system Administrator can add more rooms and also change the maximum number of participants in each of the rooms. The system Administrator also assigns the access codes, which are currently set as follows:

- Room 1 - ___ participants max.

  Moderator access code: _____

  Participant access code: _____
- Room 2 - ___ participants max.

  Moderator access code: _____

  Participant access code: _____

To enter a room simply dial the number for the conference server then enter the access code you are given. For example, if you are the Moderator of the room and are given the access code 1111#, enter the code once you are connected to the conference server. The server will automatically send you to your room and grant you Moderator authority.

The process is identical for both participants and listeners. The only difference will be the access code that they are given. Since the access codes themselves are associated with the conference room, there is no need to specify which main conference room you wish to join.

Warning: When dialing into the conference server from outside the company, you must dial the conference server's external number directly. Do not connect through the auto attendant or you may not be connected.

Conference Room Navigation

While the main conference rooms are determined by the access code, you will have the ability to enter the side rooms off the main conference room.

Each conference room has 4 side or private rooms to allow a side conference. The following codes can be used to access each of the private rooms:

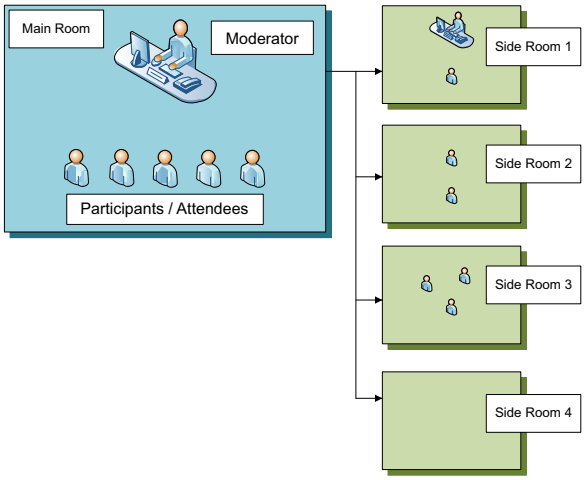
51# enter side conference room 1

52# enter side conference room 2

53# enter side conference room 3

54# enter side conference room 4

50# to return to the main conference.



Moderator's Functions

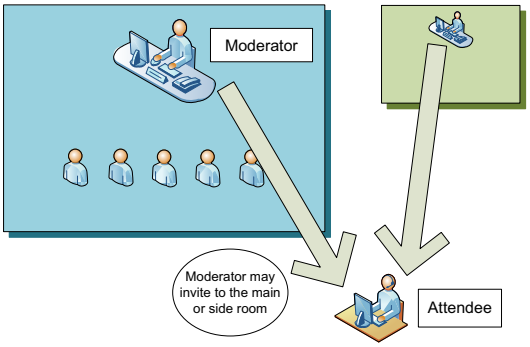
The moderator has administrative rights inside a conference room.

Note: Moderators also have access to **Speaker's Functions on page 12**.

Invitation

The Moderator can invite participants to the conference. Please view the following example to get an idea of how the procedure takes place.

1. Press **2#** from your telephone. You will be prompted to enter a number.
2. Enter the full number (at this time, there is no dial plan logic or contact integration), including a leading 9, and a call will be placed to the number.
   - If the call is unsuccessful, the chairman will hear a prompt indicating the failure.
   - If the call is successful the participant will be added to the conference room.



Note: This whole process is silent to the other participants so you don't have to worry about them hearing the digits pressed.

Note: You can also enter a side or private room and then invite a participant if you wish to prep them on the call before joining the main conference.

Note: To cancel an invitation call in progress, the Moderator can enter 20#.

Additional Moderator Functions

30# - Turn off background music

31# - 39# - Change background music (1 - 9), also enables music if it has been turned off.

71# - Recording off

81# - Recording on

72# - Announcements off

82# - Announcements on

Speaker's Functions

These are the basic functions available to a speaker.

41# - Plays your Party ID, i.e. if you were the first caller it would play 1.
42# - Plays your Caller ID, i.e. the phone number you called from
43# - Plays the number of parties currently in the conference
44# - Plays the maximum number of parties for this conference
88# - Mute
78# - Un-Mute
21# - Hand off Call to another number
9# - A help file outlining the options will be played (currently this file is not available)
0# - Return to main menu

Note: Played messages are only heard by that caller, and not by the whole room.

Listener's Functions

Listeners do not have any functions available to them.

Added Functions for Avaya Officelinx Integration

These are the advanced functions available in WeLink Conferencing.

- **Play Caller ID of Participant**: The Caller ID information is used to identify the participant when he/she enters the conference room.
- **Integration with contacts**: The Caller ID can be crossed referenced with the contact list to name the participant automatically based on the information.
- **Speaker Marker During Record**: This feature automatically creates a marker on the recorded file which allows you to see who was speaking at any given moment.
- **Transcribe Conference Option**: This feature allows you to send the recorded conference call to the transcription service so that you can receive a printout of the conversation.
- **Conference Report**: This feature creates a log of all conferences and their participants (Who joined, when they joined, when they left).
- **E-mail Summary Report**: This feature automatically sends a log to the conference organizer. The information included in the log includes the number of participants, their caller id, and the duration of the conversation.

2 INSTALLATION GUIDE

WeLink Conferencing License

In order to run the WeLink Conferencing, you must obtain a license from an authorized dealer. It is recommended that you have an Internet connection on the computer that will host WeLink Conferencing. The License requires an Internet connection to activate the conference server upon installation.

License Expiry Notice

When the license for WeLink Conferencing is about to expire, the server will play a prompt for the moderator upon login as a reminder. This prompt is only played for moderators. Participants and listeners will not hear the notice.

The notice is played under following conditions:

- 30 Days before Expiry
- 15 Days before Expiry
- 7 Days before Expiry
- 1 Day before Expiry
- The day of Expiry

When the license expires, no users will be able to connect to the conference server. To ensure seamless usage and integration of WeLink Conferencing, contact your dealer regarding license renewal as soon as possible.

License Activation

Requirements

- Internet Connection
- Site UID
- Serial Number

Warning: If you are installing the conference server on an Officelinx system, ensure that you are not running the Officelinx License Upgrade program when managing your license. You should always confirm that you are running the **Conference Server license program**.

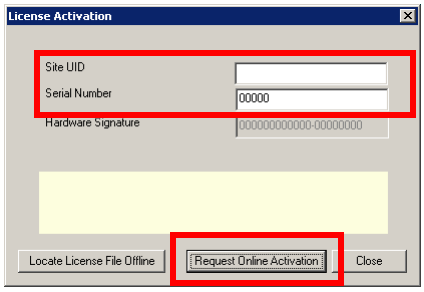
Procedure

1. Contact your dealer and place an order. Once the order is finalized you will receive **two** codes. First is the **Site UID**, and the second is the product **Serial Number**.

Warning: Site UID and the Serial number are vital and confidential. Keep a record of these numbers in a safe place.

Note: You can install the WeLink Conferencing without the license. You are free to load your license at a later time if it is unavailable during installation. Once you do install the license onto your system, you must restart the **UC Conf Server** service from **Control Panel > Administrative Tools > Services**.

2. Download the WeLink Conferencing installation program by using the link provided by your dealer. During the installation, or when you run the license upgrade program separately, you will be prompted with the following window. Enter the information in the highlighted area then click on the **Request Online Activation** button.



Warning: An Internet connection is required to activate the license.

3. The license is now active on the server computer.

Hint: For detailed instructions, refer to **page 15**.

WeLink Conferencing Installation

Note: You can install the Esna WeLink Conferencing without the license. You are free to load your license at a later time if it is unavailable during installation. Once you do install the license onto your system, you must restart the **UC Conf Server** service from **Control Panel > Administrative Tools > Services**.

Warning: If you are upgrading WeLink Conferencing from an older version and have made changes on the SIP Configuration Tool during initial installation, you must select the template for your PBX again from the SIP Configuration Tool so that the settings are refreshed during the upgrade. All of your previous channel/ extension settings and room settings will remain even if you reselect the template. After re-selecting the template, you can modify the entries to fit your needs. This is particularly important for Iwatsu systems.

Warning: By default, WeLink Conferencing uses port 50060 for communicating with the PBX (different from the 5060 default of Avaya Officelinx to avoid conflict). While this does not affect the configurations of most sites, it may be necessary to allow access to that port through network security. Be particularly aware of port usage on sites that have a Dialogic Media Gateway, since that port is often blocked by default.

Warning: When dialing into the conference server from outside the company, dial the conference server's external number directly. Do not connect through the auto attendant or you may not be connected.

Requirements

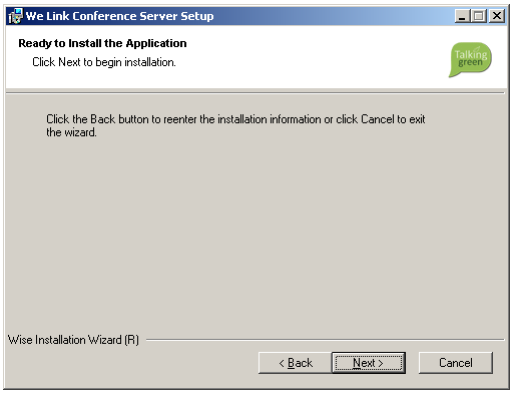
- Microsoft Windows Operating System (2003, XP, Windows 7 (32 and 64-bit), Server 2008, Server 2008 R2 (64-bit), Server 2012 (64-bit) Standard Edition)
- Microsoft .Net Framework 2.0 (this is included in the WeLink Conferencing installer)
- SIP Integration
- Internet Connection (for license activation)
- WeLink Conferencing supports up to 100 channels.

Step-by-Step Installation Instructions

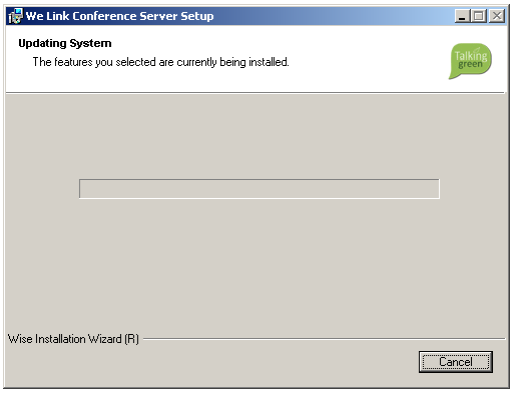
1. Locate and run the WeLink Conferencing installation file. The following screen will appear.

   Click **Next** to continue.

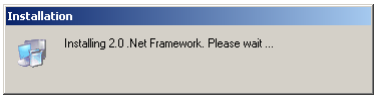
2. Click **Next** to start the installation.



3. The installation will begin.



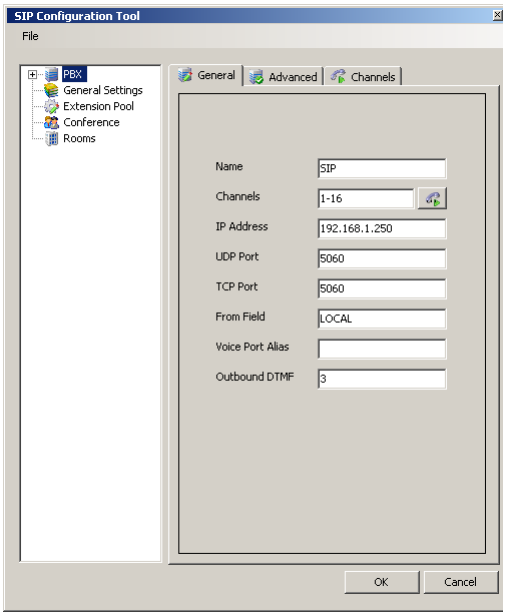
4. At this point, if you do not have Microsoft .Net Framework 2.0 on your system, the WeLink Conferencing installer will automatically add it. This process may take a while.



5. During the installation, the SIP Configuration Tool will appear. Configure SIP to reflect your own system. Most fields will be automatically populated if you used the provided templates available under the **File** menu.

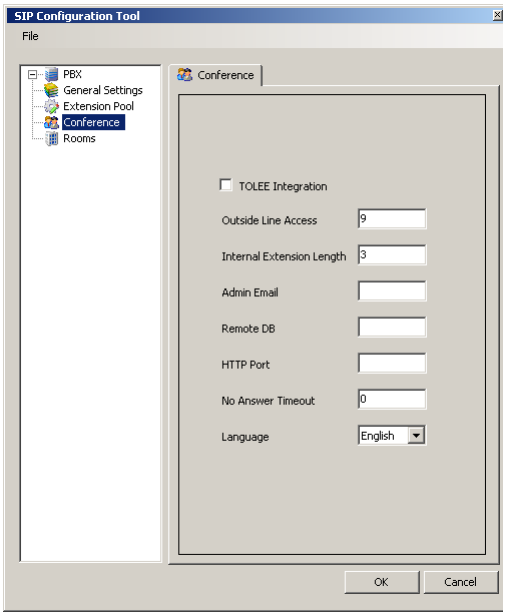
   WeLink Conferencing supports up to 100 channels.

   Once all the fields are completed, click on the **Conference** option from the left menu.

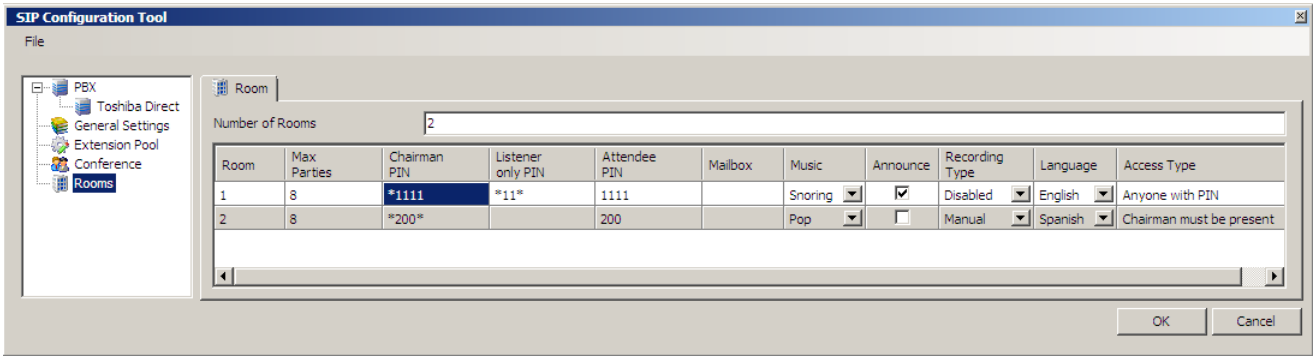


Warning: If you are upgrading WeLink Conferencing from an older version and have made changes on the SIP Configuration Tool during initial installation, you must select the template for your PBX again from the SIP Configuration Tool so that the settings are refreshed during the upgrade. All of your previous channel/ extension settings and room settings will remain even if you reselect the template. After re-selecting the template, you can modify the entries to fit your needs. This is particularly important for Iwatsu systems.

6. You can configure the conferencing settings here. This section is particularly important when integrating with the Officelinx system. The other field that will be commonly used is the **Language** selector. The language defined here will change the prompts that are played for the users when they dial into the conference server. For example, if you choose Japanese, the default prompts that the users will hear right after they dial into the conference server will be in Japanese. Please note that you must assign a language to the rooms separately if you want the prompts inside the rooms to be set to a different language. Configure the remaining fields as required then click on the **Rooms** option from the left menu.



7. You will be able to configure your conference rooms here. Enter the number of rooms that you will be using and configure each room accordingly. Click **OK** when you are finished. Each of these options is detailed below.



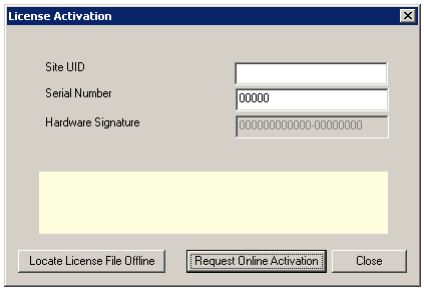
- **Max Parties**: Maximum number of participants that can be in the room simultaneously.
- **Chairman PIN**: Password required for Moderator Access.

- **Listener only PIN**: Password required for Listener Access.
- **Attendee PIN**: Password required for Speaker access.
- **Mailbox**: Enter the Mailbox that will receive the reports for the current room, this feature is only available with Officelinx integration.
- **Music**: Choose the background music that is played when only 1 person is in a room.
- **Announce**: Make an announcement to everyone in the room whenever someone else joins the room.
- **Recording Type**: Select from one of the following recording options,
  - **Disabled**: Recording the conference is disabled.
  - **Automated (2 parties)**: Conference server will automatically record the session when two or more participants are in the room.
  - **Automated (2 parties one is chairman)**: Conference server will automatically record the session when two or more participants are in the room, but one of the participants must be a moderator.
  - **Manual**: The moderator may manually start/stop the recording.
- **Language**: Select the language for the current room. This selection will change of all the prompts played in the current room to the language selected.
- **Access Type:** This option determines how s are admitted to the room.
  - **Anyone with PIN:** s with a PIN will be immediately admitted to the room.
  - **Chairman must be present:** Conference participants can log in but will not be admitted to the room until the Moderator also logs in. Until then, s will hear wait music and cannot communicate with each other.
  - **Caller ID must be in the access list:** (for future release) An INI file can be modified to add a list of telephone numbers that are allowed access to this room. Any calls from numbers not on the list will not be allowed into that room.

Note: Recording Type setting is unavailable for Iwatsu PBX systems.

Note: If there is no Avaya Officelinx integration, the conference sessions that are recorded will be stored as voice files under the conference server installation folder (c:\uc\conference\recording\room**X**\ by default. **X** represents room number).

8. After the SIP configuration, you must add the license for the WeLink Conferencing server. An Internet connection is required to activate your license.

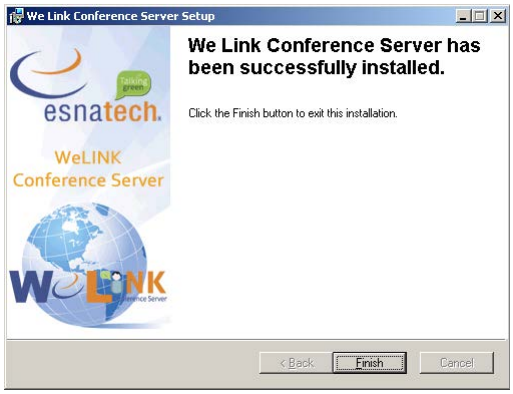


- **Please refer to License Activation on page 14**

Note: If you don't have the license ready during installation, simply click on the **Close** button to finish the installation without the license. When you receive the license information at a later time, you can update your license from the utility located at **Start > Programs > WeLink Conference Server > CS License Upgrade**. Refer to License Activation on page 14 for detailed information.

Warning: If you are installing the conference server on an Avaya Officelinx system, ensure that you are not running the Officelinx License Upgrade program when managing your license. You should always confirm that you are running the **Conference server license program**.

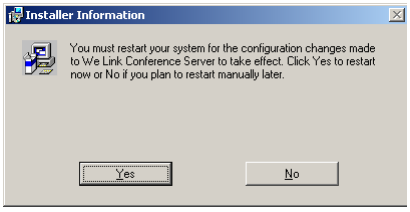
9. When licensing is complete, you will see the following window. Click **Finish** to exit the installer.



10. You will be asked to restart the computer.

    Click **OK** to restart the system.

    The installation of WeLink Conferencing is complete.



WeLink Conferencing Monitor

Overview

WeLink Conferencing has a built-in capability to display the current status of the server through a web interface. By logging into port 30060 of the conference server (e.g. **http://192.168.1.100:30060**), the technicians or the administrators will be able to view live information regarding the server. The information available from the monitor is as follows:

List of rooms

Number of Users in each room

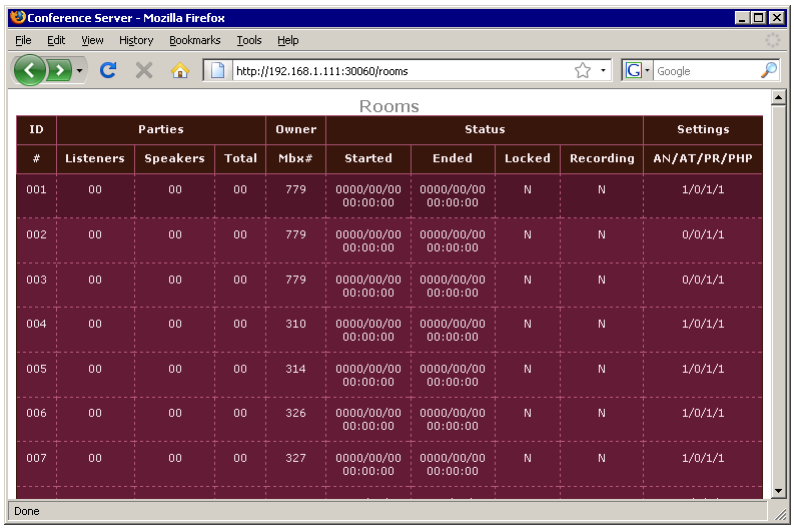
Recent activities of the room

Status of the room

Miscellaneous information regarding rooms
(e.g. Mailbox that it is attached to for Avaya Officelinx integration, etc.)

Monitor Screen

When you type in the correct address for the monitor, you will see a screen similar to the one below. Each row represents a single room in the conference server while each column contains data specific to that room.



ID	Parties			Owner	Status				Settings
#	Listeners	Speakers	Total	Mbx#	Started	Ended	Locked	Recording	AN/AT/PR/PHP
001	00	00	00	779	0000/00/00 00:00:00	0000/00/00 00:00:00	N	N	1/0/1/1
002	00	00	00	779	0000/00/00 00:00:00	0000/00/00 00:00:00	N	N	0/0/1/1
003	00	00	00	779	0000/00/00 00:00:00	0000/00/00 00:00:00	N	N	0/0/1/1
004	00	00	00	310	0000/00/00 00:00:00	0000/00/00 00:00:00	N	N	1/0/1/1
005	00	00	00	314	0000/00/00 00:00:00	0000/00/00 00:00:00	N	N	1/0/1/1
006	00	00	00	326	0000/00/00 00:00:00	0000/00/00 00:00:00	N	N	1/0/1/1
007	00	00	00	327	0000/00/00 00:00:00	0000/00/00 00:00:00	N	N	1/0/1/1

- **Listeners**: This field shows the number of listeners in a room.
- **Speakers**: This field shows the number of speakers (regular participants) in a room.
- **Total**: This field shows the total number of people in a room.
- **Mbx#**: This field shows the mailbox associated with room (for Avaya Officelinx integration).
- **Started**: This field shows the time at which the conference started.
- **Ended**: This field shows the time at which the conference ended.
- **Locked**: This field shows the locked status of the room.
- **Recording**: This field shows if the room is currently being recorded or not.
- **AN**: Announcement. This field shows if the announcements are on or off.
- **AT**: Announcement Type. This field shows what type of announcements are being played.
- **PR**: Private Rooms. This field shows if private rooms are enabled in the room.
- **PHP**: Play Help Prompt. This field shows if help prompts are on or off.

When a room is in use, it will be displayed highlighted on monitor as you can see below. When the room is being used, you will be able to see the number of users in that room and also see when the conference started.

ID	Parties			Owner	Status				Settings
#	Listeners	Speakers	Total	Mbx#	Started	Ended	Locked	Recording	AN/AT/PR/PHP
004	00	00	00	310	0000/00/00 00:00:00	0000/00/00 00:00:00	N	N	1/0/1/1
005	00	01	01	314	2009/05/29 15:24:29	0000/00/00 00:00:00	N	N	1/0/1/1

When the conference is over the highlight will disappear. At this point the **Ended** status of the conference room will be updated with the end time information so that you can see exactly when the conference started & ended.

ID	Parties			Owner	Status				Settings
#	Listeners	Speakers	Total	Mbx#	Started	Ended	Locked	Recording	AN/AT/PR/PHP
004	00	00	00	310	0000/00/00 00:00:00	0000/00/00 00:00:00	N	N	1/0/1/1
005	00	00	00	314	2009/05/29 15:24:29	2009/05/29 15:26:11	N	N	1/0/1/1

You may also click on the room number to view the specifics of that room. This will provide you with the participant's information, such as Caller ID and name if the contact information is available in the WeLink Conferencing integrated

environment.

Room 5 - Participants: 1 - Started: 2009/05/29 15:24:29

ID	Caller ID	Caller Name	Channel	Type	State	Joined
0001	358	Han, Sebastian	013	00	06	2009/05/29 15:24:29

Rooms - Copyright © 2009 Conference server

WeLink Conferencing FAQ

Licensing

Q: Can I use one WeLink Conferencing license on multiple servers?

A: No. You must obtain a license for each server.

Q: Can I move the WeLink Conferencing license to another server?

A: Yes, but you must obtain a new license for the new server from your dealer. The old license will no longer be valid. You will be allowed one hardware change free of charge. The license will be reissued to accommodate your hardware change. Subsequent hardware changes will incur an administration fee.

Q: What happens if there is a significant hardware change to the server?

A: You will be allowed one hardware change free of charge. The license will be reissued to accommodate your hardware change. Subsequent hardware changes will incur an administration fee.

Q: Can I pay for the WeLink Conferencing license month-to-month?

A: No, you must pay for the WeLink Conferencing license a year at a time.

Q: Can I add more features to the WeLink Conferencing license?

A: Yes. You may contact your dealer to upgrade your license for additional features. The license can be upgraded through the License Upgrade tool once you receive the details from your dealer.

Q: What if I add more features midway through my 1 year term?

A: You will be charged for the 1 year term on any type of feature upgrade but it will expire at the **same time as your initial order**.

Troubleshooting

Q: The server stopped working.

A: The most common causes are:

- **Sever Computer Crash**: Restart the server computer. If the conference server isn't functional after the restart, consider one of the below scenarios.
- **No Internet Connection**: WeLink Conferencing requires an Internet connection for its online license. Restore the Internet connection and the server should be functional soon after.
- **License Expiry**: WeLink Conferencing will cease to function when the license expires. Contact you dealer to renew the product license.
- **License Conflict**: The license is in use on another server. Contact your dealer.
- **Change in Server**: The hardware / software on the server has significantly changed. Obtain an updated license from your dealer.