

# InterCall Online User Guide

## Reservationless-Plus® Web Moderator



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The web-enabled conferencing feature of Reservationless-Plus adds the power of the Internet to your audio call. It turns your call into an integrated experience that adds impact to your message, increases conference participation and puts you in control with a click of your mouse.

### Logging In

- 1 Go to <https://www-ca.intercallonline.com>.
- 2 Enter your username and password. If you are a first-time user enter your owner number in the Username field and your web PIN in the Password field. You will be prompted to create a unique username and password which you will use to log into the site going forward.

### Pre-Meeting

To have a more organized meeting, you have the option of setting up all your call details ahead of time. You can load your presentations, schedule the conference, define polling questions and even send out automatic email notifications to your conference call participants.

### UPLOADING PRESENTATIONS

There are three areas from which to load a presentation:

- + In the My Library section of InterCall Online
- + While scheduling your conference (see Scheduling Your Meeting below)
- + During your conference call (see Managing Your Meeting below)

#### My Library – Adding a Presentation

- 1 Go to My Library and select **My Presentations**. This page will display any presentations that you have previously saved along with the date and time it was uploaded to InterCall Online.

My Reservationless-Plus Presentations

Upload a presentation then click Refresh List. Ensure your presentation is a valid PowerPoint document with ppt file extension and not larger than 15Mb in size.

| Topic  | Date Uploaded | Time Uploaded |
|--|---------------|---------------|
| <input type="checkbox"/> Branding Cheat Sheet    | 02/06/2008    | 05:54:58 AM   |
| <input type="checkbox"/> WebConnect              | 16/08/2006    | 04:43:29 AM   |
| <input type="checkbox"/> KLYNCH TEST             | 25/07/2006    | 08:34:09 AM   |
| <input type="checkbox"/> CP selling to marketing | 10/07/2006    | 05:35:59 AM   |
| <input type="checkbox"/> CP Module 1 training    | 10/07/2006    | 05:30:02 AM   |

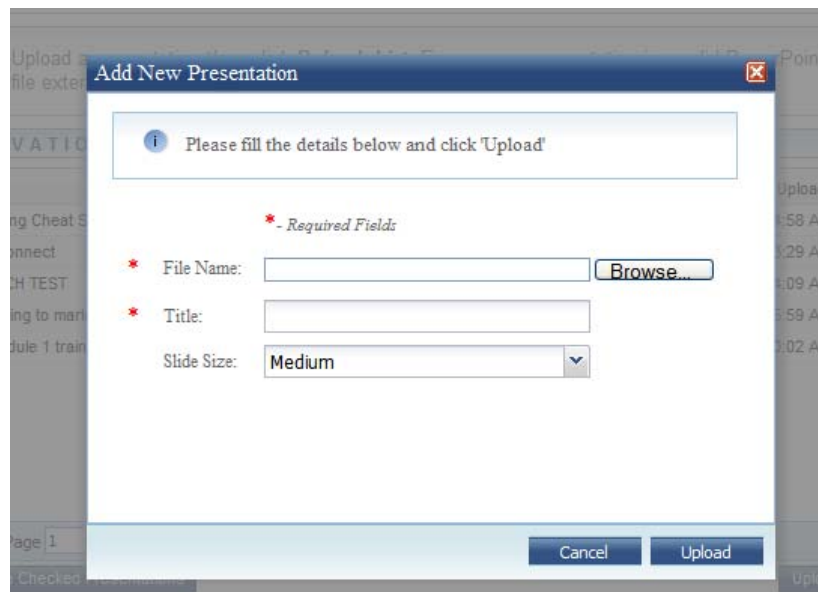
Page 1 of 1

Delete Checked Presentations Upload Presentations Refresh List

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of West Corporation

AAP/EOE

- 2 Click **Upload Presentations**.
- 3 Click **Browse** to find your file.
- 4 Choose the file you would like to upload.
- 5 Define the slide size (typically Medium).
- 6 Click **Upload**.
- 7 You will return to your Presentation Library page. Select **Refresh List** to view your newly added presentation.

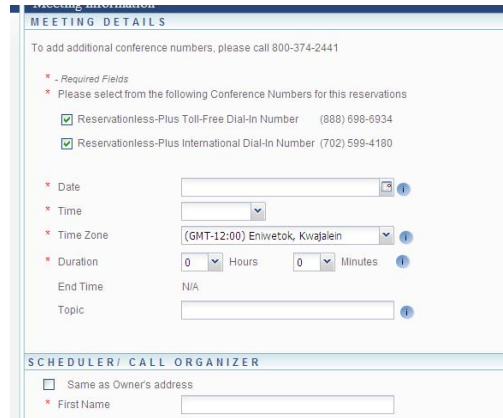


### My Library – Deleting a Presentation

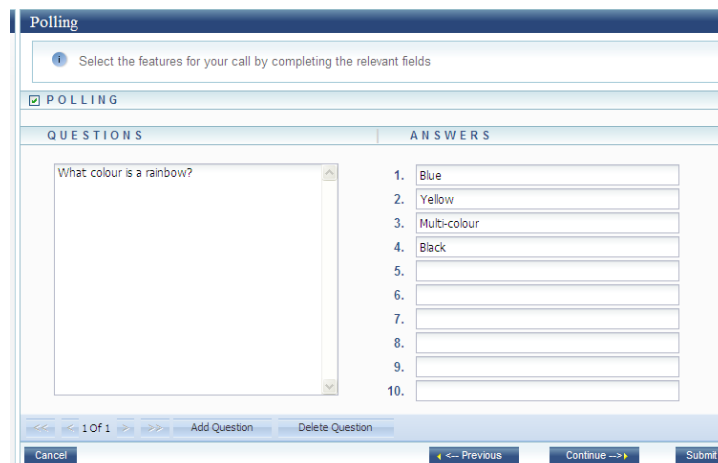
- 1 Click the checkbox to the left of the topic name.
- 2 Select **Delete Checked Presentations**.

### SCHEDULING YOUR MEETING

- 1 You can schedule your meeting directly from your Home page or by selecting **My Meetings**.
- 2 Click **Schedule A Meeting** from either location.
- 3 Select **Reservationless-Plus** and click **Continue**.
- 4 Complete the Meeting Information section with the date, time, time zone and duration of the call. Identify the scheduler/call organizer and click **Continue**.
- 5 On the **Participant List** page, identify participants to invite to your call either by selecting them from your pre-defined distribution list or by adding them manually to the form on this page.



- 6 Check the **Send Notice** box if you prefer your participants to receive an immediate email notice of the call. Check the **Send Reminder** box if you would like them to receive a reminder email up to 10 minutes prior to your call's start time.
- 7 If you would like to receive an email invite or reminder yourself, select your name from the participant list shown on the screen, check the two boxes and add your email address in the appropriate field.
- 8 Once you have completed adding invitees to your call, click **Continue**.
- 9 The **Polling** page allows you to pre-define polling questions for the call. These questions will be available to you within the Web Moderator. (You can also define polling questions during your call—see below for details.)
- 10 Check the **Polling** box; enter your question and answers. To add additional questions click **Add Question** at the bottom of the screen.



- 11 When you have completed the polling section, click **Continue**.
- 12 Any presentations that you previously uploaded in My Library are available for use. You may also upload a new presentation by selecting the **Upload Presentations** box and following the step-by-step instructions.

- 13 When you have finished uploading your presentations, click **Submit** and a confirmation will appear. You will also have the option to download the call directly to your calendar.

#### Meeting Confirmation

Click Continue to return to My Meetings page.

Your meeting has been scheduled in our systems. Should you need to edit this meeting, simply log in prior to start time and select the "My Meetings" to make changes.

[My Meetings](#)

**Conference ID 284213**

[Download Conference to Calendar \(vcs file\)](#)

[Download Conference to Calendar \(ics file\)](#)

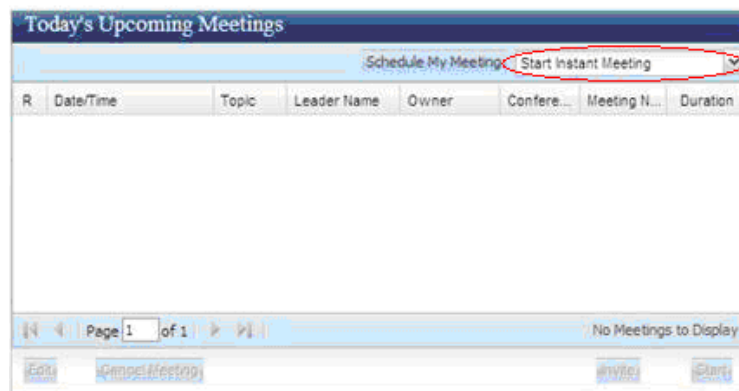
- 14 Click **Continue** to return to the My Meetings page.

## Starting Your Meeting

You have the option to start an unscheduled or a pre-scheduled meeting from InterCall Online and access the Web Moderator.

### UNSCHEDULED MEETING

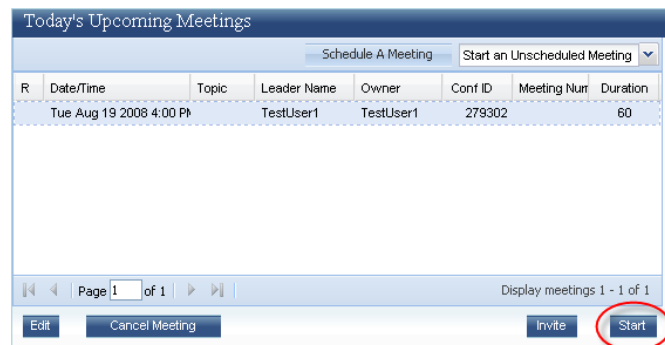
- 1 Select **Start Instant Meeting** from Today's Upcoming Meetings section on your Home page or your My Meetings page.
- 2 If you have more than one option from the Start Instant Meeting drop-down box, select **Reservationless-Plus**.
- 3 The Web Moderator will open in a separate window. If you are unable to view it, make sure pop-up blockers have been turned off in your browser.



### PRE-SCHEDULED MEETING

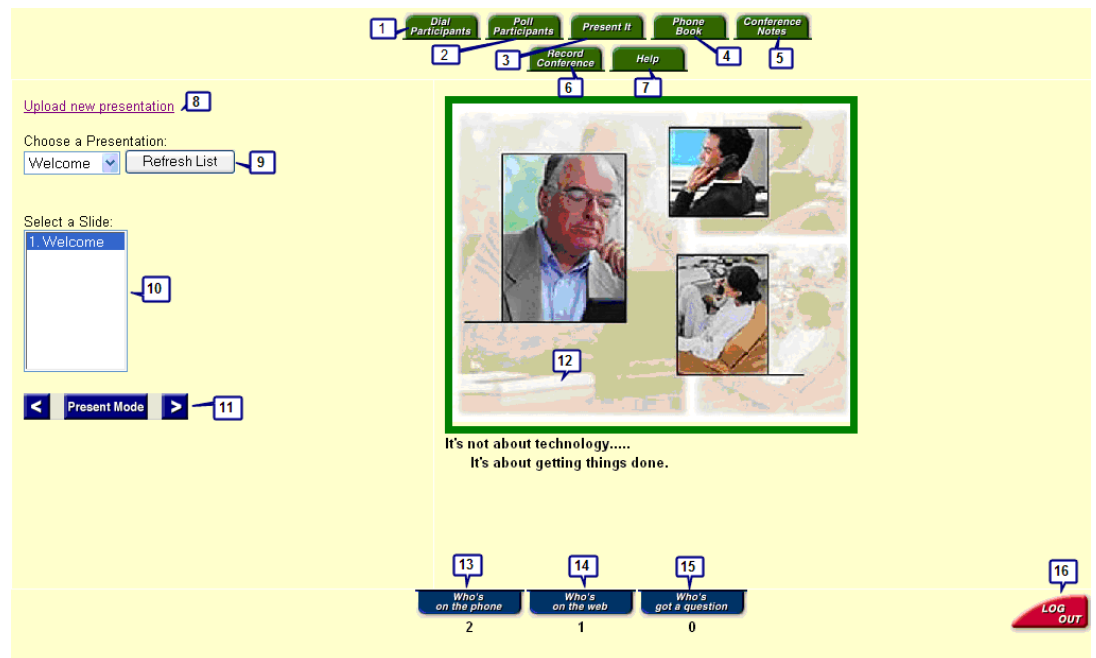
- 1 Choose a listed conference from Today's Upcoming Meetings section on your Home page or your My Meetings page.
- 2 Click **Start**.

- The Web Moderator will open in a separate window. If you are unable to view it, make sure pop-up blockers have been turned off in your browser.



## Managing Your Meeting

Easily take control of your conference by managing your call online.



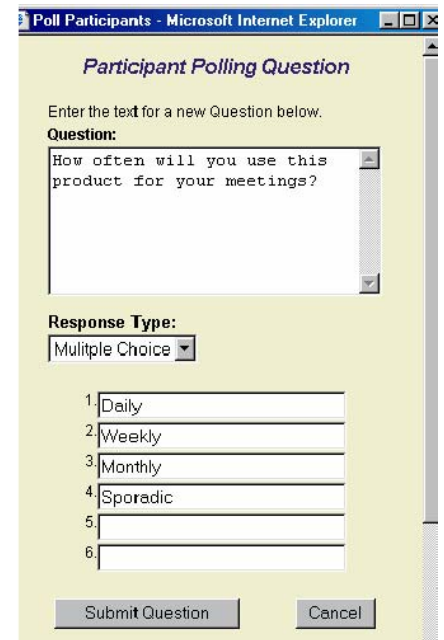
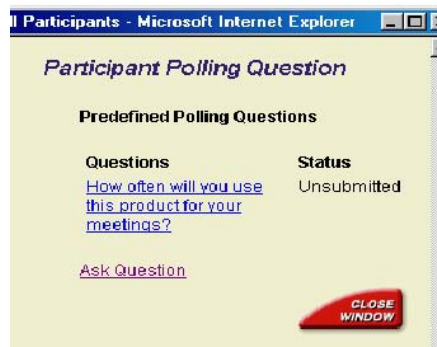
- Dial Participants:** Have the Web Moderator dial-out to you to start your call and to your participants to join your call.

- Enter a name and phone number.
- Click **Dial Now**.
- Once you hear the person on the line, click **Connect**.
- Continue this process if you would like to dial-out to others.



2 **Poll Participants:** Select from pre-defined polling questions or submit an ad-hoc poll during your call.

- To use pre-defined questions, choose the question you want to submit. A new window will open listing your question. Click **Submit Question** to present it to your participants.
- To add a new question, click **Ask Question**. A new window will appear. Enter your question to submit to your participants.

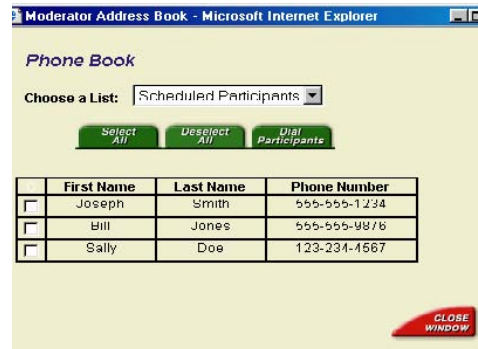


3 **Present It:** Upload presentations and navigate through your presentations.

- Upload a new presentation.
- Select one of your previously uploaded presentations.
- Choose your slide order.
- Preview your presentation.

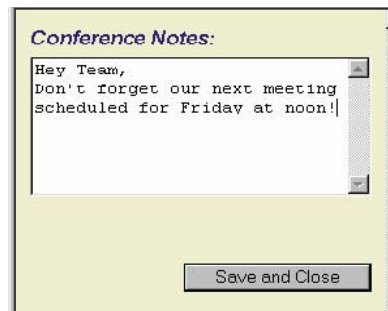
4 **Phone Book:** Access your phone book to dial-out to participants.

- A new window will open displaying a default list of participants scheduled to attend your conference.
- Select from the pull-down list or other lists you have stored in your phone book.



5 **Conference Notes:** Post information you would like your participants to view (read-only for participants), i.e., reminder for your next meeting.

- A new window will appear displaying a text box to enter your notes.
- Once complete, click **Save and Close**.
- Any conference notes saved during your meeting will be included in your post-conference email.



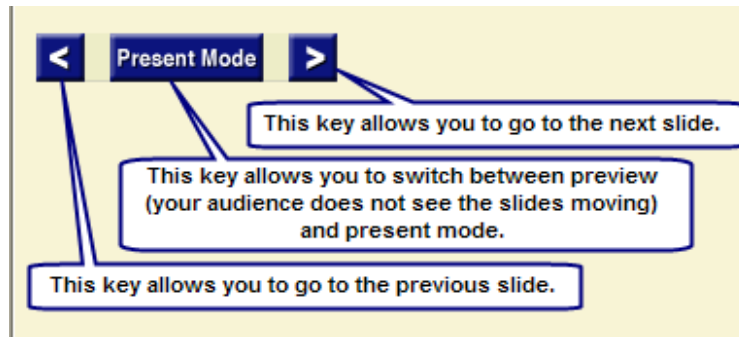
6 **Record Conference:** Record your conference for a live broadcast stream or to archive your broadcast for later playback.

- A new window will open displaying the record buttons.
- To begin recording, click **Start**.
- To end recording, click **Stop**.



7 **Help:** You and your participants can access online help if required.

- 8 **Upload a New Presentation:** Load a new presentation on the spot to use during your current meeting.
  - Click **Upload a New Presentation**.
  - Enter File Description (name of file).
  - Click **Browse** to find your presentation. Select your presentation and click **Upload**.
- 9 **Presentation List:** Select any of your presentations you have previously uploaded. You can access up to three presentations per conference.
- 10 **Slide List:** Highlight the slide you wish to present to your participants.
- 11 **Preview/Present Mode:** Choose to preview or present your presentation and flip from slide to slide.



- 12 **Data Presentation:** Your data presentation will appear here. The green outline signifies you are in presentation mode. A red outline signifies you are in preview mode.
- 13 **Who's on the Phone:** View a list of your participants that have joined the audio portion of your meeting.
- 14 **Who's on the Web:** View a list of your participants that have joined the web portion of your meeting.
- 15 **Who's got a Question:** Alerts you when a participant has a question. When selected, a new window will open displaying the question and the inquirer.
- 16 **Log Out:** Once you have finished your meeting, be sure to log out of the Web Moderator.

## Online Audio Controls

To view your audio participants on your Reservationless-Plus conference, select **Who's on the Phone**. The following moderator window will appear:

**Phone Participants**

Allow participants to continue the conference after the leader disconnects **1**

Enable waiting room announcement **2**

**3** Mute All **4** Unmute All **5** Lock Conference **6** End Conference **7** Operator Request **8** Roll Call **9** Edit Names

**10** Location: Main (2) **11** Join **12** Destination: Main **13** Transfer Selected

| <b>14</b>                | <b>15</b> | <b>16</b>  | <b>17</b>     | <b>18</b>  | <b>19</b>  | <b>20</b> | <b>21</b>  | <b>22</b> | <b>23</b> |
|--------------------------|-----------|------------|---------------|------------|------------|-----------|------------|-----------|-----------|
|                          | Type      | Conference | Status        | Phone      | Name       | Mute      | Disconnect | Dial      | Play Name |
| <input type="checkbox"/> | 🔇         | Main       | IN CONFERENCE | 9137526927 | 9137526927 |           | ✗          |           |           |
| <input type="checkbox"/> | 🔑         | Main       | IN CONFERENCE | 9137526957 | 9137526957 |           | ✗          |           |           |

**24** Cancel

- 1 Auto Continuation:** Allow participants to continue with the conference after you have disconnected.
- 2 Waiting Room:** Enable the waiting room announcement.
- 3 Mute All:** Mute all participant lines except the leader's line.
- 4 Unmute All:** Unmute all participant lines.
- 5 Lock Conference:** Lock your conference so that no other participants can join.
- 6 End Conference:** Disconnect all participants by ending your main conference and sub-conferences.
- 7 Operator Request:** Request an operator to join your conference or speak with you privately.

**Operator Request**

Please select whether you would like to speak to an operator privately, or have an operator join your conference:

**Private Request** **Conference Request**

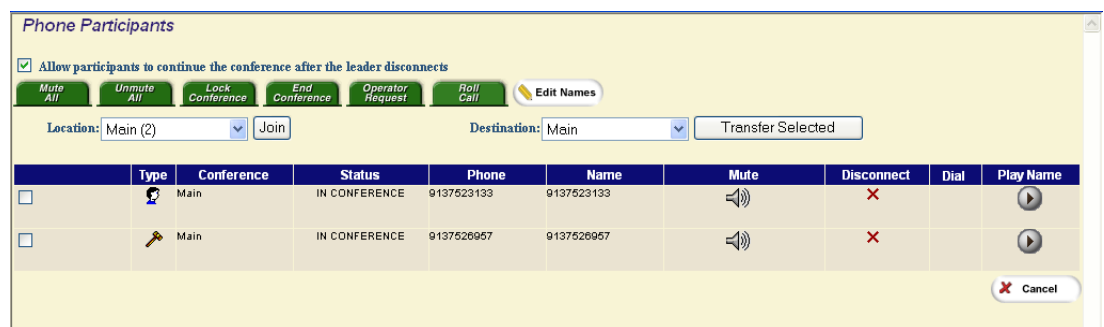
**CLOSE WINDOW**

- 8 Roll Call:** Play the name recordings that were captured when dialing into your conference.
- 9 Edit Names:** Edit the name listed for each participant selected.
- 10 Location:** Select the conference or sub-conference you would like to join.
- 11 Join:** Join the conference or sub-conference you have selected.
- 12 Destination:** Select the destination you would like to move selected participants.

- 13 **Transfer Selected:** Transfer the selected participant(s) to the conference or sub-conference destination that has been selected.
- 14 **Selection:** Designate which participants should be included in your selected function.
- 15 **Type:** Display the participant type, with the gavel representing the leader of the conference.
- 16 **Conference:** Display the conference or sub-conference in which a participant is located.
- 17 **Status:** Display the conference status of the participant.
- 18 **Phone:** Display the ANI from which the participant originated.
- 19 **Name:** Display the ANI from which the participant originated unless edited to reflect the participant's name.
- 20 **Mute:** Display whether a participant is muted or unmuted.
- 21 **Disconnect:** Disconnect a participant by clicking the checkmark.
- 22 **Dial:** Reconnect a participant that was disconnected.
- 23 **Play Name:** Play the recorded name for that participant.
- 24 **Cancel:** Close the current window.

## SUB-CONFERENCE

The Location drop-down allows you to view your participants in the main conference room, any of the 15 available sub-conference rooms or all of the rooms simultaneously.



The screenshot shows the 'Phone Participants' window. At the top, there is a checkbox for 'Allow participants to continue the conference after the leader disconnects' which is checked. Below this are several control buttons: 'Mute All', 'Unmute All', 'Lock Conference', 'End Conference', 'Operator Request', 'Roll Call', and 'Edit Names'. There are also two dropdown menus: 'Location: Main (2)' and 'Destination: Main', with a 'Join' button next to the first and a 'Transfer Selected' button next to the second. The main part of the window is a table with the following columns: Type, Conference, Status, Phone, Name, Mute, Disconnect, Dial, and Play Name. There are two rows of participants in the table, both with checkboxes in the first column.

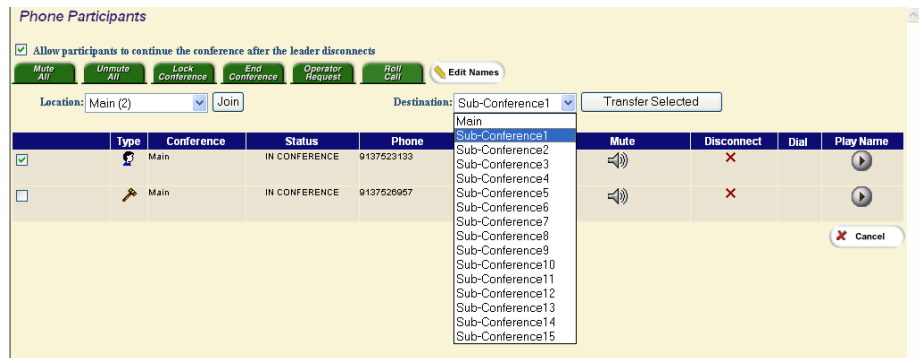
|                          | Type | Conference | Status        | Phone      | Name       | Mute | Disconnect | Dial | Play Name |
|--------------------------|------|------------|---------------|------------|------------|------|------------|------|-----------|
| <input type="checkbox"/> |      | Main       | IN CONFERENCE | 9137523133 | 9137523133 |      |            |      |           |
| <input type="checkbox"/> |      | Main       | IN CONFERENCE | 9137526957 | 9137526957 |      |            |      |           |

At the bottom right of the window is a 'Cancel' button with a red X icon.

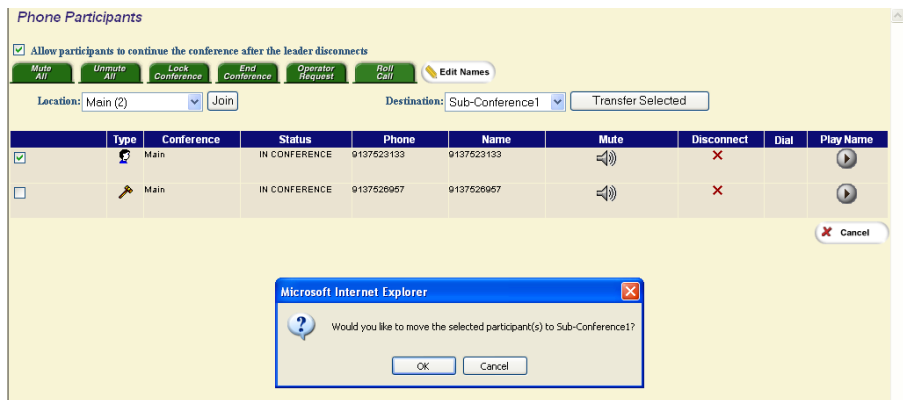
### Moving Participants to a Sub-Conference

- 1 Check the box for the participant(s) you would like to move.
- 2 Open the Destination drop-down menu.
- 3 Select one of the 15 sub-conference rooms.

- Click **Transfer Selected** to place all checked participants into that sub-conference.



- A new window will appear to confirm your requested transaction.



- Click **OK** to continue or **Cancel** to end your request.
- If you have selected OK, the participant(s) will be moved to the selected sub-conference and those participant(s) will no longer appear in the main conference room.



### Viewing All Participants on the Phone

- Go to the Location drop-down menu and change the view to All.
- The Conference column will show the conference room in which each participant is located.

**Phone Participants**

Allow participants to continue the conference after the leader disconnects

Location: All (2)  Destination: Main

|                          | Type | Conference      | Status        | Phone      | Name       | Mute | Disconnect | Dial | Play Name |
|--------------------------|------|-----------------|---------------|------------|------------|------|------------|------|-----------|
| <input type="checkbox"/> |      | Sub-Conference1 | IN CONFERENCE | 9137523133 | 9137523133 |      |            |      |           |
| <input type="checkbox"/> |      | Main            | IN CONFERENCE | 9137526957 | 9137526957 |      |            |      |           |

### Viewing All Participants on the Web

- 1 Select **Who's on the Web**.
- 2 The following moderator window will appear:

**Web Participants**

| Name         | Connect Time          | Disconnect Time | Network Status |
|--------------|-----------------------|-----------------|----------------|
| * April Park | 2008-08-20 12:12:19.0 |                 |                |

**Network Status**      Good    Unknown    Disconnected

Please note: The screenshots used throughout this guide are generically branded. Your screen may look different depending on your company's preferences, but the functionality is the same.