
# IDT Connect
# User Guide

Updated: February 28, 2011

Table of Contents

Getting Started....2
Setting Up Your Conference Room ....3
Setting your Administrator Password.... 3
Setting your Participant Password.... 3
Setting the Conference Room Name .... 3
Setting Accounting Codes .... 3
Moderator Settings .... 3
Setting Entry/Exit Prompts.... 3
Hosting a Conference Call....4
Host Access .... 4
Participant Access .... 4
Managing the Call ....5
Mute/Unmute .... 5
Add a Caller .... 5
Roll Call.... 5
Lock/Unlock Room .... 5
Continue Call .... 5
Record a Call .... 6
Participant Count .... 6
Managing Listen Only Calls ....7
Setting Up the Conference Room .... 7
Starting the Call .... 7
Managing the Question and Answer .... 7
Using the IDT Connect Conference Manager ....8
Logging On .... 8
Conference Administration .... 8
Contact Management.... 8
Conference Management .... 9
Post Conference Review .... 10
Other Functions .... 10
NEW!! Scheduled Conference .... 11
DataConnect ....12
NEW!!! AudioCast .... 12
Recording .... 13
Getting Help ....14

# Getting Started

Welcome to IDT Connect, the simplest way to have conference calls. With IDT Connect, you never need to make reservations to have a conference call; you and your invitees simply access the conference room whenever you want. You have been provided a conference room for your use at any time.

The first time you dial into the system, you will be prompted to change your administrator password and to set a participant password. This is done for your safety so no one can access your conference room. After you change your passwords (also known as PINs), you will be given a short tutorial so you can begin to experience the capabilities of IDT Connect.

# Setting Up Your Conference Room

IDT Connect gives you, the ability to customize and manage your conference room the way you want to. You can set passwords to values that you will remember, and change them as often as you want to maintain your security. Additionally, you can record a conference room name so callers know they have reached the right conference room. All of these changes can be made via a simple touch tone interface via your phone; many can also be done via the IDT Connect ConferenceManager described later.

## Setting your Administrator Password

When you first sign up for IDT Connect, you are provided a default administrator password. The first time you access the system, you will be prompted to change it. Anytime you access the system after that, if
you enter the administrator password, you will be able to perform any of the functions listed in this manual. To change your administrator password, select “4” from administrator menu. You will be prompted to enter the new administrator password. Valid passwords are 4-10 digits long. Remember to write it down so you do not forget it. If you forget your administrator password, you can call customer service to have them reset the password to the default.
Do not give out this password, as the administrator password gives you privileges before and during the call that you may not want others to have.

## Setting your Participant Password

When inviting others to a conference call, you should provide the others with the participant password. This will ensure that the other participants can only join the call or mute themselves; they will not be able to add participants or mute others. You can change your participant password as often as you want, thereby ensuring that only people invited to your current meeting can access the call.

To change the participant password, choose option “3” from the administrator menu. You will be prompted to enter the new participant password; valid passwords are 4-10 digits long. Remember to write it down so you do not forget what it is.

## Setting the Conference Room Name

You can further personalize the experience by giving a name to your conference room. The name could be a generic name (e.g. “Joe’s Conference Room”) or can be reset for each meeting (e.g. “Monday Status Meeting”). Anyone dialing into the conference room will hear this name after entering their password. This helps your participants know they have dialed into the correct meeting.

To change the name of the conference room, select “5” from the administrator menu. You will be prompted to record a name for the conference room.

## Setting Accounting Codes

You may want to enter an accounting code prior to the start of a conference call so that when you get your bill, you can track the calls to specific projects or clients. To set an accounting code for your call, select “6” from the administrator menu. [Note: The accounting code you set is only good for that call; you will need to enter an accounting code for every call you make.]

## Moderator Settings

You can choose to have your conference room set up so that you need to be there for a conference to start, or you can let others use your conference room without a moderator. To change the settings, select “7” from the administrator menu.

## Setting Entry/Exit Prompts

You can configure your conference room with either of the following choices:
Entry/Exit Tones:
Hear a tone every time someone enters or exits your conference room.
Entry/Exit Names:

Hear the person's name (as they recorded it upon entry) when they enter or exit your conference room. (default)

Silent Entry/Exit:

People come and go silently. Choose this if you want your conference call to proceed without interruption.

# Hosting a Conference Call

Hosting a conference call with IDT Connect is simple. Simply invite your guests to join you on a conference call, and provide them a dial-in number, your conference id and the participant PIN you set up.

## Host Access

1. Dial the access code:
   866-CONFER8 (866-266-3378) or
   973-409-3117 (for international access, see appendix A)
2. Enter your conference id
3. Enter administrator password. [Note: This will allow you to control the conference call, so do not distribute this password to others.]
4. Record your name, and you can then configure your conference room any way you want (see "Setting Up Your Conference Room").
5. To enter the conference room, press "1". You can now manage the conference call (see "Managing the Call")

## Participant Access

1. Dial the access code:
   866-CONFER8 (866-266-3378) or
   973-409-3117 (for international access, see appendix A)
2. Enter your conference id
3. Enter participant password.
4. Record their name

They will then be placed in the conference room; if your conference room is configured for moderator only, they will be placed on hold until you join. If they want to mute or unmute themselves, they need to press "*1".

# Managing the Call

Once you have the call underway, there are several commands you can execute to enhance the quality of the conference call. With the exception of the mute function, these commands are only accessible to the administrator. This section deals with interactive conference calls; please see the next section for setting up and managing listen-only calls.

## Mute/Unmute

Many times you will find it important to mute one or more people.
You can mute yourself or everyone else on the call. To mute or unmute yourself, press "*1". To mute or unmute everyone, press "*6". [Note: Only participants already on the call will be muted; any participant who joins AFTER you select "*6" will NOT be muted.] If you want to mute an individual, you will need to perform a roll call, at which point you can mute anyone as they are announced. Individual participants who are muted (by themselves or by the host), can unmute themselves by selecting "*1".

## Add a Caller

Many times during a conference call, you may realize that you need to add someone else to the call. IDT Connect makes it easy by allowing you to dial out to anyone at any point. Simply press "*2" and enter the number of the person you wish to reach followed by the "#". You will then have the following two options:

Offline:
1. Press "1" to wait until person is connected
2. Speak to the person offline, tell them you will add them to the conference (you can choose to disconnect the called party by pressing "***"
3. Press "**1" to return to the conference or add another participant; the participant will then be prompted to say their name and press "#"

Online:
1. Press "2" to return to conference while the system is dialing out to the participant.
2. If the system is successful in reaching the participant, they are invited to join the conference call by pressing "1", or decline by pressing "2".
3. If they choose to join, they will be prompted for their name and then introduced.

If the system was unsuccessful in reaching the participant, you will be informed accordingly.
Please note: In either case, the number you enter must be a direct dial number with no extension.

## Roll Call

It's easy to get a complete roll call of everyone who has dialed in. Simply press "*3" at any point in the conference, and you will hear each person's name, as they recorded it when they dialed in. You will then have the chance to mute or drop each person as you hear their name.

1- Mute/Unmute Caller
2- Disconnect Caller
3- Next Caller
*- Return to conference

## Lock/Unlock Room

Once you have all your participants, you can lock the conference room, ensuring that others do not accidentally barge into your meeting. To lock the meeting, simply press "*4" at any point, and your room is closed. If you need to unlock the meeting to let others in, simply press "*4" again.

## Continue Call

If your conference room is configured as "moderator required," participants will be automatically disconnected if you disconnect. In order to allow the conference to continue after you leave, press "*5"; this will allow the conference to continue, but no further participants can join if you have left the call.

## Record a Call

You can start or stop a recording of a conference call by selecting "*7". You will be prompted to confirm your request (start or stop) by pressing 1, or to return to the conference by pressing 2. Once a call is complete, the recording can be accessed via the IDT Connect Conference Manager.

## Participant Count

If you want to know how many people have dialed in, press "*#" and the system will give you the total number of people in the conference. This can help you figure out if you are missing anyone.

# Managing Listen Only Calls

If you need to conduct a more structured conference call (e.g. where only one - or a select few- can speak and everyone else can only listen, or you want to control the question and answer), IDT Connect can help. Using the same dialing instructions as you would use for a normal, interactive conference call, you can simply change your conference room as needed for the more polished conference call. Additionally, listen only calls can support up to 250 concurrent participants instead of the usual 125.

## Setting Up the Conference Room

To set up your conference room for a listen only call, simply select "*8" from the conference menu [Note: This will only change the conference room for that conference call; once you hang up, your next conference call will default back to interactive]. You (and anyone else already on the call) will be informed that the call is now listen only. Only participants who have dialed in using the host PIN or speaker PIN will be able to speak freely during the listen-only portion of the call.

NEW! Once a call has been set to listen-only, entry and exit defaults to "silent" mode so there are no interruptions when people join and leave the call.

## Starting the Call

To change your conference room to a listen-only conference room, you must first dial in as a host and enter the conference room as you would do for any other conference call; you then:

- Select "*8" from the conference menu
- Press "1" to confirm your choice

At this point, only people who dial in using the host PIN or speaker PIN will be able to speak. Participants who join using the participant password will only be able to listen to the call. They will be told how to signal a question (by pressing "*2"), and you should make a point of reminding them of this at the beginning of the call.

New! The host of the conference call can change the status of any of the participants to "speaker" allowing that person to speak freely throughout the conference call. To change a participant to "speaker" mode, please see the Conference Manager section.

## Managing the Question and Answer

Participants can signal their desire to ask a question by pressing "*2" at any point during the conference call; they can similarly remove themselves from the queue by selecting "*2" again. Questions will be queued up in the order they are received. As the host of the call, you should inform the participants how to queue up for questions, both at the beginning of the call as well as at the start of the question and answer period.

To manage the question and answers, you can use either your phone to navigate the questions in order they were received, or you can use the Conference Manager to take questions in any order. For further instructions on using the Conference Manager, please see the next section.

Using the touch tone interface:
When you are ready to start taking questions, remind participants how they can queue up for questions. Then you simply need to do the following:

1. Press "*8" to start the question and answer period
2. If you want to clear the queue, press "2"
    a. You will be prompted to confirm your choice to clear the queue
3. To take the first question, press "1"
    a. You will be informed how many people are currently in the queue
    b. Press "1" to take the question
        i. The next person will be informed that their line is now open
        ii. They will be free to speak and you will be able to answer their questions
    c. Press "2" when done with the current question
    d. Continue with b & c until done with questions
4. Press "*" to return to broadcast mode

# Using the IDT Connect Conference Manager

The IDT Connect ConferenceManager is designed to provide you a simple way to manage your conference calls, before, during and after your conference calls. With just a PC with an internet connection, you are able to manage your conference room.

## Logging On

To log on to the IDT Connect ConferenceManager, simply go to http://www.idtconnect.com/ConfMgr (figure 1). Enter your conference id (with no spaces, dots or dashes) and host PIN and you are in. [Note: The first time you access the Conference Manager, you may be asked to install the Java Runtime environment, if it is not already installed on your PC.]

## Conference Administration

Choose "Edit Preferences" from the main menu and you will be able to do the following:

Change Passwords
By entering (and confirming) either the host or participant password, you can change the password for your conference room.
NEW! Speaker Password – set a speaker password which you can then distribute to speakers on listen only calls. This will give them the ability to speak at any time without any admin capabilities.

Set Conference Preferences

- Choose if you want to require a moderator (i.e. host) to be present on your conference calls
- Choose what type of entry and exit you want for your conference calls
- Lock or unlock your conference room
- Select your preferred time zone
- NEW! Select whether or not you wish to receive an automatic email at the end of each conference

Once you are done making your changes, simply select "Update" and your changes will take effect immediately.

## Contact Management

Through the IDT Connect ConferenceManager you can store your contact list as well as conference lists. These tools facilitate dialing out to one or more participants, as well as automatically recognizing inbound callers to your conference.

Create/Edit Phone Book
The first step is to create and maintain your phone book. Any name stored in the phone book can be easily dialed out (see below), will be automatically recognized on dial in and can be added to a conference list.

Import Phone Book: If you do not have any names in your conference phone book, you can import a tab delimited text file containing only the phone numbers and names of the people you want in your list. No column headers should exist in the file. To import a phone book, select "import" from the "Phone Book" menu and enter the file name containing your contacts.
[Note: you cannot import a contact list if you already have entries in your phone book; the option will be greyed out on the menu if there are already entries in your phonebook]

Add/delete name: Names can be added or deleted manually by selecting "edit" from the "phone book" menu and typing in the name and phone number of a new contact or deleting a contact.

Delete Phone Book: You can delete your entire phone book by selecting "delete" from the "phone book" menu; this enables you to import a new phonebook.

Export Phone Book: You can export your phone book to a text file; this makes it easy to then transfer the file to another pc to import the phone book there.

Create/Edit Conferences

Conferences are lists of contacts from your phone book who would regularly join in a conference together. You would create a conference list to facilitate dialing out to multiple participants at one time.

Create Conference: Select "create" from the "conference" menu and then select the name(s) of the participants from your phone book and give the conference a name (e.g weekly staff meeting). This name will then appear in the "invite conference" menu.

Edit Conference: Select "edit" from the "conference" menu and choose the conference you want to edit. You can then add or delete participants as needed.

Delete Conference: You can delete an unneeded conference list by selecting "delete" from the "conference" menu and selecting the conference you no longer need.

## Conference Management

The primary interface of the ConferenceManager will show you all the participants on your conference call. The interface shows you:

- Time the participant joined
- Time the participant left (if applicable; the table automatically puts people who have left the conference at the bottom)
- Status (mute/unmute)
- Type of caller (participant/host/speaker)

Through this interface you will be able to do the following:

Fill In Names: As people join the conference, you can fill in their names in the table. This will make it easier for you to determine who is still online and who is speaking. [Note: The name will automatically be entered if the participant is in your phone book and is calling from the number listed.

Add participant: Select the person from the pull down in the field next to "add participant or enter the phone number of the person you wish to add in the box next to "add participant" and the system will dial out and attempt to add the person.

To dial out to multiple people at the same time, simply type each phone number separated by a space. You can also dial out to a preset list of people by selecting "Conference -> Invite" and choosing the appropriate conference list; the system will dial out to all members of the list at the same time.

Drop participant: Right click anywhere on the row for a particular participant and select "drop" from the pop-up menu

Mute Participant(s): Right click on the participant record and select "mute" from the popup menu. To mute or unmute everyone, simply click on "Mute/Unmute All" button

Clear Inactive: You can clean up the interface by removing any participant who has dropped of the call by selecting the "clear inactive" button.

Adjust Volume: You can adjust an individual participant's volume by sliding the arrow right or left to increase or decrease the volume as needed.

NEW! Change to Speaker: Right click anywhere on the participant's record and choose "speaker" to allow the person to speak freely during a listen only conference.

Additionally, you can also start and stop conference recording by selecting the appropriate button under the recording heading. Recordings will be available for download via the conference history for up to 30 days after the conference.

Lastly, you can use the ConferenceManager to manage your large/listen-only calls.

Change call status: Toggle between listen only and interactive mode

Take questions: Select participant with question to allow them to ask question for all to hear.

## Post Conference Review

By choosing “View Conference History” from the main menu, you will be presented with a list of all past conference calls you made. Each record will detail start & stop times along with the total number of participants (note: if someone dropped off and then rejoined, they are counted twice). For each record you can also:

View Conference Detail: Click on “Conference Details” and you will see a record of everyone who joined the call.

Download Recording: If the conference call was recorded, you will be able to download an MP3 file of the recording for at least 30 days after the conference. The recording can be downloaded by right-clicking on the recording icon next to the conference detail and saving to your computer.

## Other Functions

Invite People to Conference: By selecting “Email Invitation” from the main menu, you will be able to automatically create an email invitation, which automatically includes the access numbers, conference id and current participant PIN. This will help you eliminate any typos when sending out your email invitations to participants.

Print Card: Lost your wallet card? By choosing “Print Card” you can print a new copy right on your printer, with your conference id and PIN printed on it. Make sure to keep it safe so that noone else can access your account.

## NEW!! Scheduled Conference

You can schedule a conference ahead of time, including setting up automatic recording, setting to listen only, creating unique PINs for each participant and emailing an invitation to the guests. To use this feature:

Scheduling a Conference

1. Select "Conference Reservations" from the main menu
2. Any previous conferences that you reserved will be listed there; if a conference has not yet occurred, you can edit any of the settings or send a reminder email
3. Select "add new conference reservation"
4. Enter a title (for easy reference), start and end date/time, number of anticipated participants and your desired accounting code (if desired) and add some text to the summary field.
   a. You can make your meeting a recurring event by clicking the icon next to the start date & time. You can choose the frequency (daily/weekly/monthly) as well as the number of times you want to have the meeting
5. You can then choose any of the options to the right: automatic recording, listen only, unique PIN and email notification
   a. If you choose automatic recording, your conference will be recorded from the moment you start the conference
   b. If you choose listen only, your conference will automatically be listen-only
   c. If you choose unique pin, the system will assign each participant you invite a unique PIN
   d. If you choose email notification, you will be able to easily send each participant an email with the access information. You can also choose to have an automatic reminder sent out prior to the conference call.
6. You can add participants to the invite list by choosing "add participant", and entering the information needed (you can choose them from your contact list) or you can select an entire conference list from your preexisting conferences
   a. If you select the check box to the left of the name, the system will dial out to the participant at the start of the call [Note: Dial out participants will not be added until the host starts the call, as detailed below]
   b. If you have selected "unique pin", the system will automatically populate the unique PIN field after you press "save"
      [Note: It is a good idea to add yourself to the list in order to receive a copy of the email]
7. Press "save"
   a. If you have selected email notification, the system will automatically send an email invitation to each participant on your participant list

Changing a Scheduled Conference

If you need to make any changes to a conference that you have already scheduled, you can edit the conference.

1. Select "Conference Reservations" from the main menu on conference manager
2. Select "edit" next to the conference you want to change
3. Make any of the changes you need
4. Select "save"
   a. If you have selected the automatic email option, the system will automatically email the changes to each of the participants

Note: You can also re-create a past scheduled conference by selecting "re-reserve" next to an old conference. This will maintain all the parameters or a prior conference, including unique PINs, for an upcoming conference.

Holding a scheduled conference:

Once you have reserved a conference, there are a few differences to note from the normal function.

1. You will not be able to use the normal participant PIN starting 30 minutes prior to the scheduled start time of the conference call
2. Hosts and speakers can join up to 30 minutes prior to the scheduled start time of the conference and hold a pre-conference. Participants who dial in early will be placed on music hold
3. To start the actual conference (add all participants to the conference, start the recording is set up), the host must press the "start conference" key on the conference manager (or you can press 41 on the phone pad)

# DataConnect

DataConnect is a powerful add-on to IDT Connect that allows you to share data with other conference participants while speaking on the phone. DataConnect is totally web-based, and thus requires no software installs.

Two versions of DataConnect are offered:

- DataConnect Basic provides the ability to share a Microsoft PowerPoint presentation over the internet
- DataConnect Enhanced further provides the ability to share any application, poll the audience, and much more.

Instructions for use of DataConnect can be found online at www.idtconnect.com/dataconB.asp for the basic service or www.idtconnect.com/dataconE.asp for the enhance service.

When used in conjunction with IDT Connect, you can combine the audio from the conference call with the data from DataConnect in two ways:

- AudioCast your conference call over the internet to provide your audience with a single interface for both audio and data
- Record your conference call creating a single, mutil-media file (flash format) which can be downloaded for future viewing.

## NEW!!! AudioCast

[Note: Both the audio and data portions of the conference should be up prior to starting the recording.]

1. On the DataConnect host interface, press the audiocast icon on the dataconnect page (you must be logged onto DataConnect Enhanced as an admin)

2. Enter 781-452-2059 and press “dial” (make sure your speakers are on so you can hear the prompts)

3. When you hear the prompt to enter your conference id, enter your conference id and # in the bridge access code and press “send” [note: the web-based interface will say “listening to 781 . . .”] [Note: You may need to enter your PIN more than once]
4. when you hear (on the phone) that the call is being recording, press “start audiocast” to begin the recording
5. mute the speakers on your PC
6. when done recording, press “stop recording”

Participants will be given a choice to listen to the conference via conference call or

## Recording

[Note: Both the audio and data portions of the conference should be up prior to starting the recording.]

1. On the DataConnect host interface, press the recording icon on the dataconnect page (you must be logged onto DataConnect Enhanced as an admin)

2. Enter 781-452-2059 and press “dial” (make sure your speakers are on so you can hear the prompts)

3. When you hear the prompt to enter your conference id, enter your conference id and # in the bridge access code and press “send” [note: the web-based interface will say “listening to 781 . . .”]
   [Note: You may need to enter your conference id more than once]
4. when you hear (on the phone) that the call is being recording, press “start recording” to begin the recording
5. mute the speakers on your PC
6. when done recording, press “stop recording”

Downloading a recording

1. Press the recording icon on the dataconnect page (you must be logged onto DataConnect Enhanced as an admin, but the conference does NOT need to be active)
2. Select the “archive tab”
3. choose the file and format you want to download (exe or zip) and save to your desktop
4. Unzip or run the download to extract the recorded file

# Getting Help

IDT Connect was designed to be easy to use without you ever needing help. But we know that sometimes you need help. So we have made it easy for you to get the assistance you need.

If you need a reminder of what menu options are available, simply press “*9” during the call, and you will hear a menu of options.

Need to talk to a live person? Just hit “*0” and you will be connected with customer service.

Or, you can call us toll free, any time, at 1-800-818-6291.