Chapter 9  Telephone Conferencing

The Telephony feature of Elluminate Live! enables you to conduct your audio communications with other session attendees via telephone conferencing, while continuing to use your computer for all other Elluminate Live! features. As a telephone conference user, you will be fully integrated into the Elluminate Live! session: you can communicate with users not connected via teleconference (the traditional microphone and speaker users) and your communications will be captured in session recordings.

For further information about telephone conferencing, including best practices and a training video, visit the following web page:
http://www.elluminate.com/support/telephony/.

If your organization does not offer teleconferencing services with Elluminate Live! and you would like to learn more about it, contact your Elluminate representative.

As a Moderator, you can use all the available Telephony features. Participants can use a subset of these features.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Moderators</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configure/edit teleconference connection information.</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Connect/disconnect the session to/from the teleconference.</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Announce the session to the teleconference.</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Increase/decrease the volume of the teleconference.</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Mute/un-mute the teleconference.</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Switch another Moderator or a Participant’s audio communications from Audio (VoIP) to Telephony (telephone) and vice versa.</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Switch own audio communications from Audio (VoIP) to Telephony (telephone) and vice versa.</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Participate in Elluminate Live! session via teleconference.</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

26 The visual elements of the Telephony user interface will not be visible in the recording.
Telephony is accessed via the Audio panel and has the following components:
The Key Players

Incorporating a telephone conference into your Elluminate Live! session requires the participation of three key players: the Elluminate Live! Moderator, the Teleconference Bridge and the Teleconference Chairperson.

The Elluminate Live! Moderator

A Moderator is responsible for configuring the teleconference information in Elluminate Live!, establishing and maintaining the connection to the telephone conference and managing the telephony users within the Participants list. The Moderator may communicate in the session using either microphone and speakers (VoIP) or the telephone (Telephony).

The Teleconference Bridge

To incorporate a telephone conference into your Elluminate Live! session, an Elluminate Live! Moderator needs to establish a bridge between the teleconference and the Elluminate Live! session by configuring teleconference connection information and connecting the session to the teleconference. Although this bridge is not a person (it is software), it shows up as a session attendee in the Participants list (as depicted below).

Teleconference Chairperson

With some teleconference providers, a Teleconference Chairperson must join the teleconference before other participants can join. For example, when participants try to join a teleconference before the chairperson has joined, they may hear a message such as “All participants will be on hold until the chairperson has joined the teleconference.”

Beyond the initial connection phase, the Teleconference Chairperson also may need to manage the telephone conference and its participants via call controls issued on a touch-tone telephone.
The Teleconference Bridge as Teleconference Chairperson

If the only purpose of the Teleconference Chairperson is to enable others to join the teleconference (i.e., no further teleconference management is required), the Teleconference Bridge can be used to simulate this role. You will need to program the Teleconference Bridge with the Teleconference Chairperson PIN. (For details, see Configuring Connection Information to a Telephone Conference on page 137.)

The Elluminate Live! Moderator as Teleconference Chairperson

If a Teleconference Chairperson is needed beyond the initial connection phase to manage the telephone conference and its participants, the Teleconference Chairperson must be an actual person. If the Elluminate Live! Moderator is familiar with the management of the teleconference service, he or she could take on this role. In this case, the Moderator must use Telephony for audio communications (since performing Chairperson functions requires the use of the touch-tone keypad on a telephone connected to the teleconference). Except during the initial connection phase, there is no way to send call control codes via the Teleconference Bridge.

Configuring Connection Information to a Telephone Conference

To connect a session to a teleconference, you must configure the teleconference connection information within the Elluminate Live! session. This entails entering the telephone number(s) and PIN(s) provided by your telephone conference administrator for the desired teleconference.

You can configure teleconference connection information only if telephony has been enabled for the session by the session creator in the Elluminate Live! Scheduling Server. If the telephony icons ( and ) do not appear in the status bar, you will not be able to connect to a telephone conference.

This guide assists you with connecting to an teleconference that has already been set up – it does not instruct you how to set up a teleconference. For assistance with an existing teleconference, or to have a new teleconference created, consult your telephone conference administrator.

To configure telephone conference connection information, follow the steps below:

27 Session Administration System
1. Obtain the phone number(s), PIN(s) and SIP (if required) for your teleconference from your telephone conference administrator.

2. Open the Teleconference Connection dialog in one of the following ways:
   - From the Tools menu, select Telephony > Configure Telephone Conference.
   - Click on the Configure Teleconference Connection Information button in the status bar (at the bottom of the window).

3. Enter the connection information for the teleconference.
   a. Enter the telephone number and PIN for Elluminate Participants. The information is for display purposes only (so Participants know what telephone number and PIN to use to connect to the teleconference). North American and international numbers are valid.
   b. Enter the telephone number and PIN for Elluminate Moderators. The information is for display purposes only (so Moderators know what telephone number and PIN to use to connect to the teleconference). North American and international numbers are valid.
c. Enter the telephone number or SIP (Session Initiation Protocol) URI\(^{28}\) and PIN for the Elluminate Session (the Teleconference Bridge). The information entered in these fields is processed by the teleconferencing bridge and sent over the connection to the telephone network. Only North American numbers are valid. (See **A Note on Telephone Number Formats** below.)

If the Teleconference Bridge will be used to simulate the role of Teleconference Chairperson, enter the Teleconference Chairperson’s PIN in the PIN field.

If programmed responses to the teleconference are required during the connection phase (e.g., to skip roll call, wait for an announcement to complete, wait for an intermediate connection to occur, etc.) then those codes must be entered into the Session PIN field. Consult your teleconference provider for details.

A SIP URI should be used where possible, as it avoids per-minute gateway service charges. Some well-known teleconference numbers may be automatically mapped to a SIP URI by Elluminate. Please contact your Elluminate administrator to see if a SIP connection is available through your teleconference provider.

The Elluminate Session is the bridge that connects the Elluminate *Live!* session to the telephone conference. It is listed as a session attendee in the Participants list.

**A Note on Telephone Number Formats**

*Session Telephone Numbers*

Numbers must match the domestic North American format: 1-###-###-####. (International numbers are not supported.)

*Moderator and Participant Telephone Numbers*

Numbers may have any format (North American or international). The only requirement is that the characters entered are limited to the numbers 0 to 9, spaces and the characters - . * # ( and ).

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28 A SIP URI should have the following format: sip:xxx@host.domain. See your teleconference administrator for further details.
A Note on the PIN and Programmed Responses

The Elluminate Session PIN field may be used to provide programmed responses. Many call centers provide interactive functions to their users via the telephone keypad. Typically, such commands are a # followed by two or three digits. For example, #42 might be "skip roll call" and #13 might be "re-record my roll call entry". Of course, the codes will vary from provider to provider so you should consult your teleconference administrator for details.

You can also program pauses into your PIN to leave time for the completion of an automated greeting or to include a programmed response. To enter a pause, type a comma.

The following are valid entries in the PIN field:

- ,,, 1212
- #421212
- ,#42,1212

4. Save the teleconference information:

✓ If you want to connect to the teleconference immediately, click on the Save & Connect button.

✓ If you want to connect to the teleconference later, click on the Save button.

Note that, when the teleconference is fully configured (with at least session and participant data), the Configure Teleconference Connection Information button (in the status bar) is replaced by the Connect to Teleconference button.

Connecting the Session to the Telephone Conference

Once you have configured the connection information, you must establish the bridge (connection) between the session and the telephone conference.

To connect the session to the telephone conference, follow the steps below:

1. If you will be using the telephone for audio communications in the session, switch to Telephony (click on the Use Telephony button in your Audio panel) and dial in to the teleconference.
If you see the button in your Audio panel, this means that there is no connection information (telephone number and PIN) available for display to you. If you have the connection information from another source, go ahead and use it to connect to the teleconference; otherwise, wait until the button changes to the **Use Telephony** button – the connection information will then be displayed.

2. There are two ways to begin the connection process:
   - From the Tools menu, select Telephony > Connect Session to Telephone Conference.
   - Click on the **Connect to Teleconference** button in the status bar.
   A progress window will show the connection to the teleconference.

3. A confirmation dialog will prompt you to confirm that you have connected to the teleconference. For information on how to tell if you are connected, refer to *How will I know I’m connected?* below.
   - Click on **Confirm** to confirm the connection.
   - Click on **Reannounce** to hear the announcement again.
   - Click on **Disconnect** to cancel connection.
**How will I know I’m connected?**

If you have already joined the teleconference via telephone, you will hear an audio announcement from the Elluminate Live! session indicating that the session has joined the teleconference.

If you are listening using your computer’s microphone and speakers, you may hear a greeting from the teleconference (depending on the teleconference provider and/or configuration) and then the normal sounds of the teleconference. If there are not yet any teleconference participants, you may wish to place a quick telephone call to the teleconference to generate some sound to be heard over your computer’s speakers. If you do so, be sure to hang up the telephone once you have confirmed the connection in order to avoid echoing or other audio artifacts.

Note that a new “Participant” called Teleconference is listed in the Participants list.

Also note that the Connect to Teleconference button (in the status bar) is replaced by the Disconnect from Teleconference button and the Teleconference is not Connected status icon is replaced by the Teleconference is Connected status icon.

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**Reconnecting the Session to the Teleconference When the Connection Fails**

If the session gets disconnected from the teleconference either deliberately by a teleconference moderator or accidentally by, for example, a telephone or network failure, a Teleconference Disconnect notification dialog will be displayed to all session Moderators.

If the time limit for the teleconference has expired, you will be disconnected (after a warning) and not able to reconnect. (Time limits are set by the Telephony Call Server administrator.)

To reconnect to the session click on Reconnect. As with the issuance of the command Tools > Telephony > Connect Session to Telephone Conference, you will be prompted to confirm the connection.
The Teleconference Disconnect notification dialog is not displayed when a Moderator issues the command Tools > Telephony > Disconnect Session from Teleconference.

Disconnecting the Session from the Telephone Conference

Only a Moderator can disconnect the session from the telephone conference. You may want to do so if, for example, you inadvertently connected to the wrong teleconference and need to change the connection information or all Telephony users have left the session. To disconnect, follow the steps below:

1. There are two ways to end the connection process:
   - From the Tools menu, select Telephony > Disconnect Session from Telephone Conference.
   - Click on the Disconnect from Teleconference button in the status bar.

You will be presented with the Confirm Disconnect dialog.
2. Click on Yes to disconnect The Participant called Teleconference will no longer be listed in the Participants list.

**Adjusting the Sound**

**Muting the Teleconference**

You can prevent the audio from the teleconference from entering the session by muting the teleconference. However, the teleconference participants will continue to hear each other and will still receive audio from the session.

Muting is equivalent to removing the Telephony privilege from all telephone Participants. You cannot mute individual telephone Participants.

To mute the teleconference, click in the Audio column of the Telephony Participant. The Telephone icon will be interdicted\(^{29}\) to indicate that the sound from the teleconference is muted in the session.

To un-mute the teleconference, click in the Audio column of the Telephony Participant again.

**Changing the Volume**

You can change the volume of the audio emitted by the session and received by the teleconference by selecting Tools > Telephony > Increase Volume to Teleconference or by selecting Tools > Telephony > Decrease Volume to Teleconference. Repeating these commands will increment the volume up or down (respectively) within the preset minimum/maximum range.

Some teleconference providers normalize the incoming volume, so you will not hear volume changes.

\(^{29}\) circled with a line through it
Announcing the Session to the Teleconference

If you are using Telephony and want to confirm that the teleconference bridge is working (such as after a disconnection), announce the Elluminate Live! session to the teleconference by selecting Tools > Telephony > Announce Session to Teleconference.  

You will know you are connected when you hear (via your telephone connection) the teleconference announcement, which may be a recorded message or an audio signature of some sort. For specific details on what announcement you should expect, contact your teleconference administrator.

Joining a Teleconference

Any session attendee (Moderators and Participants) can join a teleconference, provided a Moderator has set one up for the session. To join a teleconference, follow the steps below:

1. Click on the Use Telephony button in your Audio panel. The Connect to Teleconference dialog will open.

   You cannot click on the Use Telephony button if you have the Audio Talk button engaged – it will be disabled.

2. Using your telephone, dial the teleconference telephone number displayed in the Connect to Teleconference dialog.

3. Enter the teleconference PIN when prompted to do so by the teleconference (if required).

30 This command is the same as that invoked by the Reannounce button in the Confirm Connection dialog.
4. When you’ve successfully connected to the teleconference, click on **OK** in the Connect to Teleconference dialog.

You will know you are connected to the teleconference when you hear the teleconference announcement. This announcement may be a recorded message or an audio signature of some sort.

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**Leaving a Teleconference**

To leave a teleconference and once again use your Audio microphone and speakers, click on the **Use Audio** button in the Audio window.

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**Switching Communications Mode of another Session Attendee**

As a Moderator, you can switch the audio communications mode of another Moderator or a Participant within the session.

For example, you may want to switch a Participant’s mode from Audio (microphone/speakers) to Telephony (telephone conference) if you know the Participant has joined the teleconference but has forgotten to switch to Telephony. In this situation, echo and feedback caused by the Participant’s microphone may disrupt the session.

**Microphone and Speakers (Audio) to Telephone (Telephony)**

If you know a session attendee has already dialed in to the teleconference but has forgotten to switch to telephone mode, you can switch them yourself. To switch another session attendee’s audio communications mode from Audio (microphone/speakers) to Telephony (telephone conference), right-click (**Click on Macintosh**) on the session attendee in the Participants list and select Audio > Switch to Telephone from the context menu.
Telephone (Telephony) to Microphone and Speakers (Audio)

To switch another session attendee’s communications mode from Telephony (telephone conference) to Audio (microphone/speakers), right-click (^Click on Macintosh) on the session attendee in the Participants list and select Audio > Switch to Microphone and Speakers from the context menu.

Sending the Telephony Users to Breakout Rooms

All Telephony users must be placed into the same breakout room as the Teleconference (Bridge) participant. If they are not, their communications will not be properly routed to the session and VoIP users. (For details on breakout rooms, see Breakout Rooms on page 267.)

If telephone participants are moved to a breakout room that does not contain the Teleconference (Bridge) participant, they will continue to hear the teleconference audio from the room containing the Teleconference Bridge, and will not be able to hear or interact with VoIP users in the breakout room.
Activity Indicators

You can monitor the state of Telephony transmissions through indicators displayed in the Audio permission column of the Participants list.

The table below lists the icons that are used in the Participant list to indicate what activity a session attendee is doing while using Audio or Telephony. (For details on Audio, see The Audio Window page 109.)

<table>
<thead>
<tr>
<th>Activity Indicator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🎤</td>
<td>A microphone icon in the Audio column indicates that the Participant or Moderator has Audio permissions.</td>
</tr>
<tr>
<td>🎤🌟</td>
<td>A microphone icon with a yellow halo indicates that the Participant or Moderator is currently talking using the microphone (has engaged the Talk button).</td>
</tr>
<tr>
<td>📞</td>
<td>A telephone icon with a yellow halo next to a Moderator or Participant indicates that the Participant or Moderator is currently connected to a telephone conference and that the Teleconference participant is not muted. If the icon appears next to the Teleconference participant, then it means that the Teleconference participant is connected and not muted.</td>
</tr>
<tr>
<td>📞🌟</td>
<td>An interdicted telephone icon next to a Moderator or Participant means the Participant or Moderator has switched to Telephony for audio communications but the session is currently not connected to a telephone conference or the teleconference has been muted. If the icon appears next to the Teleconference participant, then it means that the Teleconference participant is muted or not connected to the teleconference.</td>
</tr>
</tbody>
</table>

Setting Telephony Permission for Participants

There is no Telephony privilege per se. However, muting the teleconference is equivalent to removing the Telephony privilege from all telephone Participants.

For details on muting the teleconference, please refer to Muting the Teleconference on page 144.
Sorting the Participants List

When Telephony is enabled on your Elluminate Live! server, four new options are available to sort the Participants list: Sort by Audio Mode, Keep Teleconference on Top, Keep Teleconference on Bottom and Keep Teleconference on Top When Muted. These and the four standard options are available in the Sort option menu, which can be opened by clicking on the Sort button (noted in the diagram below).

The sorting options you choose will sort the Participant List in all rooms you enter (the main room and breakout rooms) for the duration of your current login session. If you exit a session and re-enter it later, your sorting options will be lost and the defaults restored.

The Sort option menu is divided into three sections: the top section contains the Column Sorting options, the middle section contains the Participant Sorting options and the bottom section contains the Teleconference Sorting options.

Column Sorting Options are mutually exclusive – you can only pick one. You cannot choose to pick none, two or all three options:

- **Sort by Audio Mode**: sorts by icon type in the Audio column, with the microphone icon listed first and the telephone icon listed second.
- **Sort by Participant**: sorts alphabetically by name in the Participant column. (default)
- **Sort by Raised Hands**: sorts numerically by number in the Raised Hands column – that is, in the order in which Participants raised their hands.

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As Participants raise their hands, numbers are assigned to them in the Raised Hands column, based on the order in which they raised their hands.
**Participant Sorting Options** are independent – you can pick both at once. You also can pick only one or neither of these options:

- *Keep Me on Top:* keeps you at the top of the list.
- *Keep Moderators on Top:* keeps all Moderators at the top of the list. (default)

**Teleconference Sorting Options** are mutually exclusive – you can pick either none or one only. You cannot choose to pick two or all three options:

- *Keep Teleconference on Top:* keeps the teleconference “Participant” at the top of the list.
- *Keep Teleconference on Bottom:* keeps the teleconference “Participant” at the bottom of the list.
- *Keep Teleconference on Top When Muted:* keeps the teleconference “Participant” at the top of the list if it has been muted.

**Sorting Rules**

**Rule 1:** A hierarchy existing between the sorting options, where certain options take precedence over other options.

a. The Participant Sorting option *Keep Me on Top* always supersedes the other Participant Sorting option *Keep Moderators on Top*.

b. The Participant Sorting options (*Keep Me on Top* and *Keep Moderators on Top*) supersedes the two Teleconference Sorting options *Keep Teleconference on Top* and *Keep Teleconference on Top When Muted*. (*Keep Teleconference on Bottom* is not affected by the Participant Sorting options.)

c. The Participant Sorting options and the Teleconference Sorting options supersede the Column Sorting Options (*Sort by Audio Mode*, *Sort by Participant* and *Sort by Raised Hands*).

**Rule 2:** Sorting is dynamically updated following specific events: a hand is raised or lowered or a Moderator or Participant joins or leaves the session.

**Rule 3:** When Sort by Raised Hands is selected and all the raised hands are cleared, the list is sorted alphabetically by Participant name, even though Sort by Participants is not selected.