

cgPhone Online - Conference Administration Guide

BETA STATUS NOTIFICATION



cgPhone Voice Conferencing administration is currently in BETA status. User interface design and functions may be limited.

Conference Administration Access required



A secure & encrypted cgPhone voice conference can be scheduled and administrated only by registered cgPhone Online users with conference administration rights. If you are a registered cgPhone user and you need to set up a secure phone conference please contact support@certgate.com to obtain conference administration access.

After receiving your user ID & Password for the cgPhone Online Conference administration portal please access the portal here: [cgPhone Online Conference Portal](#)

Overview

cgPhone Online offers secure, encrypted phone conferences for registered cgPhone users on request at no additional charge. This Guide is targeted for registered cgPhone user who will set up cgPhone conferences through the cgPhone Online web interface. In case of any errors please contact us at support@certgate.com.

	Screenshot	Description
1 Setting up a Conference		Guide Definitions: Conference User = cgPhone user who is setting up and manages the conference Participants = cgPhone user who participates in a cgPhone conference

1.1 Start Conference Wizard:

cgPhone Server Configuration | user

Home Conference Voicemail

Own Conferences Invitations Moderation

Own Conferences

Begin 23 03 2017 End 23 03 2017 Filter Page 1

#	Creator	Subject	Begin	End	Duration	Participants	Allowed Phones	Actions
There are no conferences in the specified time frame!								
								+

Please visit the [cgPhone Online Conference Portal](#) and log in with your individual credentials (provided for registered cgPhone user on request from support@cer tgate.com)

In section "Conference" / "Own Conferences" click the "+" symbol to start the wizard to create a new conference.

1.2 Specify Start & End Time:

cgPhone Server Configuration | user

Create New Conference

Step 1: Define Time

Attribute	Value		
Begin	23	03	2017
	07	30	
End	23	03	2017
	08	30	

Abort << >> Finish

First you need to specify a begin and an end date and time.

Recurring Conferences?

It's possible to have a conference running over multiple days or weeks days in case you need recurring conferences or a "reserved" conference room for a specific group of cgPhone users.

1.3 Fill in Subject and description of the conference



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user

Create New Conference

Step 2: Specify Details

Attribute	Value
Subject	Test Conference
Description	This describes the conference. Both subject and description are put into the invitation e-mails that will be sent out later when we officially invite the participants to the conference.

Abort << >> Finish

Please specify a subject and a description. This information is used for mail-invitation to the participants.

1.4 Specify Secure & Encrypted cgPhone Conference Type



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user

Create New Conference

Step 3: Allowed Phones

Attribute	Value
Allowed Phones	<input type="radio"/> Not secure Don't place any restrictions on the type of the phone. <input checked="" type="radio"/> Secure Only allow encryption-capable devices. This setting offers the highest level of security for your conference.

Abort << >> Finish

Here, the conference administrator may to include "non-secure" phones into the conference. *This feature is currently not activated - please keep type as "secure" and continue.*

1.5 Confirm Conference or Cancel



cgPhone Server Configuration

user

Confirm or cancel conference set up - next step will be to specify and invite conference participants.

Create New Conference

Step 4: Confirm Creation

Attribute	Value
Creator	firstname.lastname@company.com
Begin	25.03.2017 09:30
End	25.03.2017 12:00
Allowed Phones	secure only
Subject	Test Conference
Description	This describes the conference. Both subject and description are put into the invitation e-mails that will be sent out later when we officially invite the participants to the conference.

Please look carefully over the details of your planned conference.
If everything is in order click the "Finish" button to plan the conference.
In case you need to correct something use the "<<" and ">>" buttons to navigate.

Abort << >> Finish

2 Add & Invite Participants

2.1 Start Participant Invitation Wizard

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Create New Conference

The Results

Your conference has been created successfully. It is now in the planning stage. You can use the [Participants Wizard](#) to add participants to your conference. If you wish to use the Invitation Wizard later you can do so from the conference listing.

[Back](#)

Before the conference can start, we need to invite participants.

This is done through the participants wizard which can be invoked directly after creating a conference or through the participants icon in the conference list.

Click on "Participants Wizard" link to start invitation process,

cgPhone Server Configuration | user

Home Conference Voicemail

Own Conferences Invitations Moderation

Own Conferences

Begin End Page

#	Creator	Subject	Begin	End	Duration	Participants	Allowed Phones	Actions
1	flastnam	Test Conference	25.03.2017 09:30	25.03.2017 12:00	02:30	1	encrypted only	

...or click on "participants" icon to start invitation process.

2.2 Adding Participants

cgPhone Server Configuration | user

Participants List

for conference "Test Conference" on 25.03.2017 at 09:30 created by firstname.lastname@company.com

E-Mail	Role	PIN	Actions
firstname.lastname@company.com	Moderator	28501	

Click "Abort" to disregard all changes.

[Abort to Own Conferences](#) << >> [Finish and return to Own Conferences](#)

By default, the creator of the conference is added in a moderator role. More about roles later.

A new participant can be added by clicking "+"

2.2.1 Adding mail address of conference participants



Add Participants

Step 1: Enter Details

Choose participants from list (by typing email address, name or extension number) or enter email address.

Attribute	Value
E-Mails	user1@domain.com
	user2@domainX.de
	More...
Role	<p><input type="radio"/> Audience A participant who can only listen.</p> <p><input checked="" type="radio"/> Participant A normal participant. Can talk in conference.</p> <p><input type="radio"/> Moderator Participant with super powers. He can kick people and lock/unlock the conference.</p>

Abort to Participant List << >> Finish and return to Participant List

There are three roles available: audience, participant and moderator.

- **Audience** = people who are only allowed to listen, but not talk.
- **Participants** = are people who are also allowed to talk.
- **Moderators** = participants with additional functions, e.g. lock /unlock the conference to prevent more people from joining, kicking people etc. Moderator functions are available on the cgPhone app during the conference.

You may add multiple participants /audience /moderators at once.


Please type their name or extension and you may select from the list of registered cgPhone user. In case you want to send to a specific mail address, please enter the mail address.

Add up-to 20 people in one batch by clicking "More..." (link on lower right corner...)

Need more than 20 participants?

You can add up-to 250 people into one conference by adding additional batches of 20 people. Please click on ">>" and re-start adding another batch.

2.2.2 Review added conference participants list

 cgPhone Server Configuration | user

Add Participants

Step 2: Confirm

Role	E-Mail
Participant	user1@domain.com
	user2@domainX.de

After clicking "Finish" these participants will be added to your conference.

Abort to Participant List << >> Finish and return to Participant List








Before the new participants are added, the Conference User can review role and e-mail addresses of the participants before making the decision final.

2.2.3 Confirm or cancel conference participants list and add to conference



Participants List

for conference "Test Conference" on 25.03.2017 at 09:30 created by firstname.lastname@company.com

E-Mail	Role	PIN	Actions
firstname.lastname@company.com	Moderator	28501	 
user1@domain.com	Participant	to be generated	 
user2@domainX.de	Participant	to be generated	 
			

Click "Finish" to make this participant list permanent.
Click "Abort" to disregard all changes.

[Abort to Own Conferences](#) << >> [Finish and return to Own Conferences](#)

Here we see the two additional participants we just added. They are displayed in black because there are no user accounts associated with their e-mail addresses.

The moderator of this conference is displayed in green because he has a user account in the system.

When done, please click "Finish and return to Own Conferences".

The system will now finally add the participants to the conference and create individual PIN numbers accordingly.

2.2.4 Conference created confirmation



Participants List

The Results

Your new participant list has been written over the existing participant list.
The following changes have been made:


E-Mail	Role	PIN	Action taken
firstname.lastname@company.com	Moderator	28501	nothing changed
user1@domain.com	Participant	35892	added participant
user2@domainX.de	Participant	74676	added participant

[Back to Own Conferences](#)

New participants have been added and PIN numbers were created.

2.3 Send Invite & finalise the Conference

2.3.1 Go to Conference list





 **cgPhone** Server Configuration | user

Home Conference Voicemail

Own Conferences Invitations Moderation

Own Conferences

Begin 23 ▾ 03 ▾ 2017 ▾ End 25 ▾ 03 ▾ 2017 ▾ Filter Page 1 ▾


#	Creator	Subject	Begin	End	Duration	Participants	Allowed Phones	Actions
1	flastnam	Test Conference	25.03.2017 09:30	25.03.2017 12:00	02:30	3	encrypted only	   

A conference can't happen until the participants have been invited.

This is when we go live and all participants are officially invited.

Click the invite icon (envelope) to start the Invitation Wizard. Once it has completed successfully, the conference will be finalized and set to go.

2.3.2 Final review conference details

 **cgPhone** Server Configuration | user

Invite to Conference

Step 1: Conference Details

Attribute	Value
Creator	firstname.lastname@company.com
Begin	25.03.2017 09:30
End	25.03.2017 12:00
Allowed Phones	secure only
Subject	Test Conference
Description	This describes the conference. Both subject and description are put into the invitation e-mails that will be sent out later when we officially invite the participants to the conference.

Please look carefully over the details of your planned conference. This is your last chance to correct conference details. To do so, click "Abort" to return to the conference listing.

Abort << >> Finish

In the first step there is one last chance to review all conference details.

2.3.3 Select mail invitation or not



Invite to Conference

Step 2: Invite Participants

Send E-Mail	E-Mail	Role	PIN
<input type="checkbox"/>	firstname.lastname@company.com	Moderator	28501
<input checked="" type="checkbox"/>	user1@domain.com	Participant	35892
<input checked="" type="checkbox"/>	user2@domainX.de	Participant	74676

Mark all Clear all

Please select the participants that are supposed to receive an automated E-Mail message. Leave those participants unselected that you want to address personally. You can always see their PINs when viewing the conference details.

Abort << >> Finish

In the second step you can determine who will receive an e-mail and who won't, in case you want to write an individual e-mail or deliver the PIN personally.

2.3.4 Final check mail invitation list



Invite to Conference

Step 3: Confirmation

Automated E-Mails for these participants

E-Mail	Role	PIN
user1@domain.com	Participant	35892
user2@domainX.de	Participant	74676

No automated E-Mails for these participants

E-Mail	Role	PIN
firstname.lastname@company.com	Moderator	28501

Please make sure to tell the remaining participants their respective PINs. Otherwise they can't participate in the conference. You may click their e-mail addresses to write custom invitation e-Mails.

Please check the list of participants carefully. After clicking "Finish" the conference will switch to state "scheduled". After that you won't be able to change the conference details, reschedule or change the list of participants.

Abort << >> Finish

In the third step is the final chance to review the participants and if they receive an automated e-mail. When you click "Finish" then the invitations will be sent and the conference will be finalized.

Please Note: After sending eMail invitations no changed to the conference schedule (date / time) are allowed. In case of a change you will have to cancel the conference and send out a new invitation.

2.3.5 Invitation sent confirmation - DONE!



Invite to Conference

The Results

Invitations have been sent.
Your conference is now scheduled.

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Own Conferences

The conference has been cancelled and the invited attendants have been informed by E-Mail.

Begin End Page

#	Creator	Subject	Begin	End	Duration	Participants	Allowed Phones	Actions
1	flastnam	Test Conference	25.03.2017 09:30	25.03.2017 12:00	02:30	3	encrypted only	

The cgPhone Online system sent out invitations and scheduled finally the conference.

The conference is now finalised.

Please Note: After sending eMail invitations no changed to the conference schedule (date / time) are allowed. In case of a change you will have to cancel the conference and send out a new invitation.

3 Modify, Change & Errors

3.1 Modifying Participants Role (Audience, Participant, Moderator)



Participants List

for conference "Test Conference" on 25.03.2017 at 09:30 created by [firstname.lastname@company.com](#)

E-Mail	Role	PIN	Actions
firstname.lastname@company.com	Moderator	28501	
user1@domain.com	Participant	35892	
user2@domainX.de	Participant	74676	

Click "Abort" to disregard all changes.

Abort to Own Conferences << >> Finish and return to Own Conferences

If you wish to change the role of a participant click the modify icon (pencil).



Modify Participant's Role

Step 1: Change Role

Attribute	Value
E-Mail	user1@domain.com
Role	<input checked="" type="radio"/> Audience A participant who can only listen. <input type="radio"/> Participant A normal participant. Can talk in conference. <input type="radio"/> Moderator Participant with super powers. He can kick people and lock/unlock the conference.

Abort to Participant List << >> Finish and return to Participant List

You will then be given the opportunity to change the participant's role.



Modify Participant's Role

Step 2: Confirm

E-Mail	Role
Audience	user1@domain.com

After clicking "Finish" the changes to this participant will be made permanent.

Abort to Participant List << >> Finish and return to Participant List

After confirming your choice the change will be made and you will be taken back to the participants list.



Participants List

for conference "Test Conference" on 25.03.2017 at 09:30 created by firstname.lastname@company.com

E-Mail	Role	PIN	Actions
firstname.lastname@company.com	Moderator	28501	
user1@domain.com	Audience	35892	
user2@domainX.de	Participant	74676	

Click "Finish" to make this participant list permanent.
Click "Abort" to disregard all changes.

Abort to Own Conferences << >> Finish and return to Own Conferences

3.2 Deleting Participants from Conference

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Participants List

for conference "Test Conference" on 25.03.2017 at 09:30 created by firstname.lastname@company.com

E-Mail	Role	PIN	Actions
firstname.lastname@company.com	Moderator	28501	
user1@domain.com	Participant	35892	
user2@domainX.de	Participant	74676	

Click "Abort" to disregard all changes.

Abort to Own Conferences << >> Finish and return to Own Conferences

If you made a mistake adding a participant to your conference you can always delete the participant. Simply open the participants wizard, locate the participant you wish to delete and click the trash icon.

cgPhone Server Configuration | user

Remove Participant

Confirm

Attribute	Value
E-Mail	user2@domainX.de
Role	Participant

Please click "Finish" to remove this participant or "Abort" if you changed your mind.

Abort to Participant List << >> Finish and return to Participant List

After confirming your choice the participant will be deleted from the participants list.

3.3 Canceling a Conference

cgPhone Server Configuration | user

Hello Firstname Lastname! [Log Off](#)

Home Conferences Voicemail

Own Conferences Invitations Moderation

Delete Conference "Test Conference"

Conference Details		Participants		
Attribute	Value	E-Mail	Role	PIN
Creator	firstname.lastname@company.com UID: firstname	firstname.lastname@company.com	Moderator	28501
Begin	25.03.2017 09:30	user1@domain.com	Participant	35892
End	25.03.2017 12:00	user2@domainX.de	Participant	74676
Allowed Phones	secure only			
Subject	Test Conference			
Description	This describes the conference. Both subject and description are put into the invitation e-mails that will be sent out later when we officially invite the participants to the conference.			

[Delete](#) [Abort](#)

Support: support@certgate.com [Version Info](#)

If a conference has to be canceled the user can click trash icon.

Once the user clicks "Delete" the conference will be deleted. If invitations have been sent out already then automated cancellation e-mails will be sent to all participants.

3.4 Error during sending invitations



Invite to Conference

The Results

Invitations have been sent.
Your conference is now scheduled.

The following E-Mail addresses failed on send:

- user1@domain.com
- user2@domainX.de

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If the cgPhone Online server will not be able to send out an invitation by mail, the error will be displayed after sending the invitations.

Please double-check your mail addresses on typo and correct domains.

To send out the participants PIN numbers, please go back to "OWN CONFERENCES" and click the INFO button/icon. You will find all participants PIN numbers on the overview list. You will have to re-send out the PIN numbers manually to failed mail address.