



**PureConnect®**

**2022 R3**

Generated:

18-October-2022

Content last updated:

27-April-2020

See **Change Log** for summary of changes.



# Interaction Conference

## Administrator's Guide

### Abstract

This document contains the content for Interaction Conference Administrator's Guide.

For the latest version of this document, see the PureConnect Documentation Library at: <http://help.genesys.com/pureconnect>.

For copyright and trademark information, see [https://help.genesys.com/pureconnect/desktop/copyright\\_and\\_trademark\\_information.htm](https://help.genesys.com/pureconnect/desktop/copyright_and_trademark_information.htm).

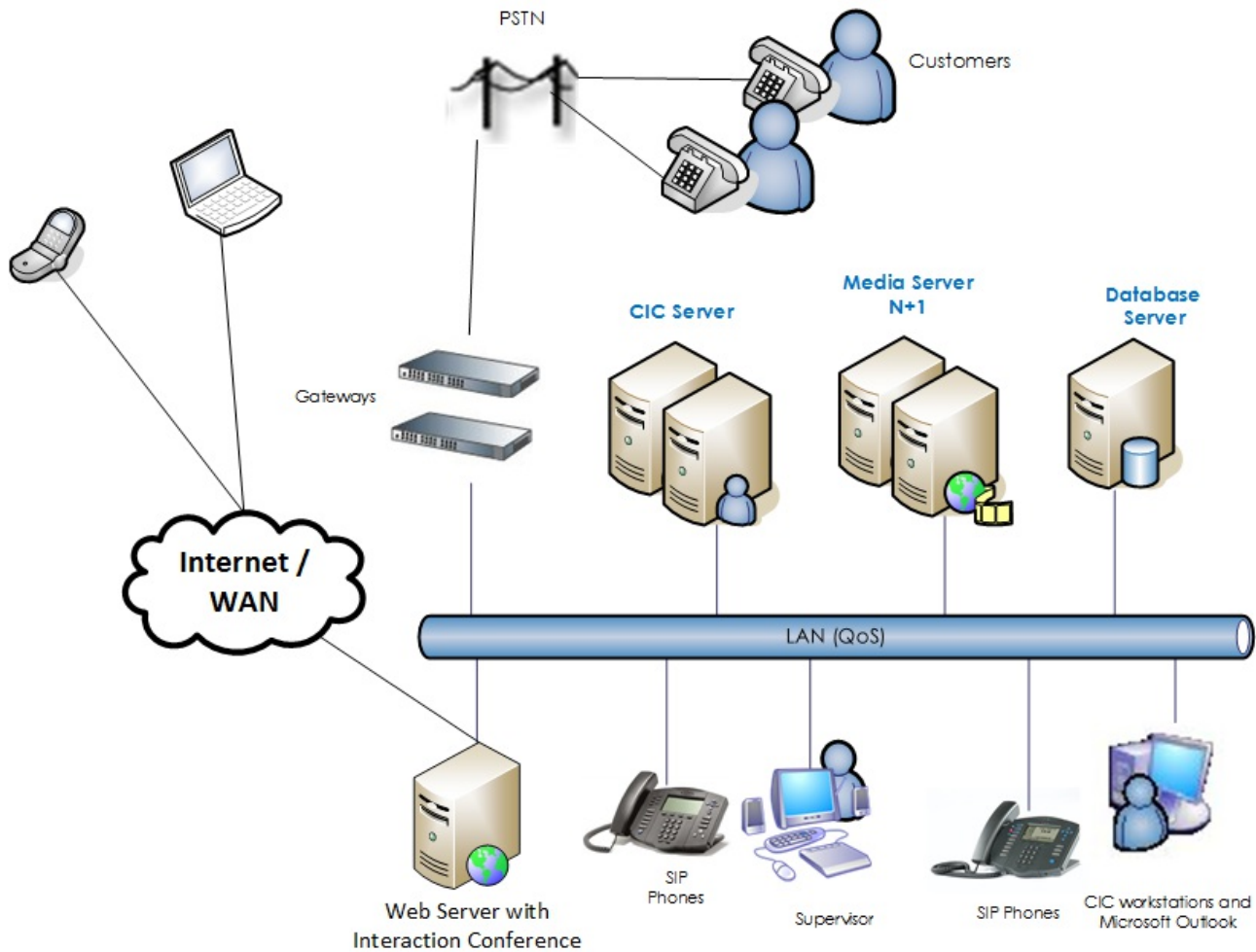
# Table of Contents

Table of Contents	2
Standard Features	3
Architecture and System Requirements	4
Installation Tasks	6
To install Interaction Conference:	6
To install and configure Interaction Conference, complete the following tasks. The installation tasks are:	6
Install Interaction Conference Web Server	7
On the IIS Web Server:	7
Optionally install Interaction Conference Web Server using command-line parameters	7
Install Interaction Conference Plugins for CIC Server	9
To install the Interaction Conference plugins and related components on the CIC server:	9
Results of the Interaction Conference Plugins Install on the CIC Server	10
Apply the Interaction Conference License	10
Optionally install Session Manager IConference plugins on Off-Server Session Manager servers	11
From each Off-Server Session Manager Server:	11
Install Interaction Conference Outlook Plugin	11
Prerequisites for Installing Interaction Conference Outlook Plugin	11
Installing the Outlook Plugin using a Group Policy	11
Define Servers and Server Options	17
To define servers and server options:	17
Administration Procedures	18
Assign rights to configure global Interaction Conference settings	18
To assign rights to configure global settings:	18
Assign rights to manage individual conference rooms	20
Restrict rights to use conference rooms	21
To restrict access to a conference room:	21
Assign rights to create and modify conferences	22
To assign rights to create conference calls and to create and modify conferences:	23
Establish general configuration settings	24
Enable call control for all conferences	24
Require account codes for all conferences	24
Conference Access Type	24
Conference Resource Limit	25
Enforce resource limit when joining a conference	25
Default notification sender address	25
Set default conference options	25
Lock	26
Host Required to Start	26
Enforce End	26
Allow Mute	26
Record	27
Announce Entry	27
Announce Exit	27
Announce Number of Attendees	27
Define conference rooms	27
Configuring Interaction Conference Phone Numbers and Stations	29
Interaction Conference Stations	30
Define Email Templates	32
To create an email template:	32
Change the default time for unused conferences	34
Change the default to display only my conferences in the Conference List page	34
Change Log	35

# Standard Features

- Conferences are created using a central browser-based application.
- Conference support for single-event and recurring schedules (weekly, monthly, and so on).
- Recurring conferences are modeled from Microsoft Outlook Appointment Recurrence screens.
- Conferences support open and PIN access modes.
- Conference creators can opt to mute any caller.
- Multiple muting options to set per conference for attendees – enter muted, enter unmuted, or muting is not allowed.
- Notifications for upcoming conferences can be sent using email.
- Conference creators can designate that callers are announced by recording their names. This requirement can include both an entry and exit announcement.
- A user (an individual who can schedule conferences) has variable access to conferences based on a configured profile.
- Integrated Windows Authentication for user access is available.
- Users logging on using their domain account can also include their Outlook Personal Contacts.
- Resources are dynamically allocated to allow a conference to extend past its scheduled time. The system sees that the end time of the conference is approaching and if there are available resources that are not reserved; the conference is allowed to continue.
- If resources are scheduled for another conference, the active conference is required to end at its scheduled time, and the conference is dropped at the end time.
- Standard reports show conference usage. Reports are broken down to show usage across different groupings.
- Hosts can monitor the conference to see when participants have joined, the current call status, and remote caller information.
- The monitor page also includes call controls for the conference. Call controls include: Mute, Hold, Drop, Unmute, and Pickup.
- Conference calls can be recorded and the recordings emailed.
- Interaction Conference purges open conferences that have not had calls for the previous 365 days.

## Architecture and System Requirements



The Interaction Conference system consists of several components installed on one or more servers within your network. These servers and components include:

### IIS Web Server

An Internet Information Services (IIS) that hosts the *Interaction Conference Web Administrator* application, which is a set of ASP.NET webpages that allow administrators to schedule and manage conference calls. The web application is all inclusive in terms of conference administration, monitoring, and call control. The IIS server must meet the following requirements, which the installation program checks:

- Microsoft Windows Server 2012 R2, Microsoft Windows Server 2016, or Microsoft Windows Server 2019
- Internet Information Server (IIS) 8.5 or later
- The Role Services for ASP.NET and Static Content Compression must be installed and enabled
- Microsoft .NET Framework 4.0 (extended)

### Database Server

The Database Server serves as the repository for conference scheduling and historical data. This database is also the IC Report Database where all CIC servers record call data. The Interaction Conference plugin install that runs on the CIC server starts IC Setup Assistant to apply a script to the existing CIC database. This use of Setup Assistant requires the CIC database administrator credentials.

For detailed requirements about the CIC database, see CIC System Requirements in the *PureConnect Installation and Configuration Guide* at

[https://help.genesys.com/cic/mergedProjects/wh\\_tr/mergedProjects/wh\\_tr\\_installation\\_and\\_configuration/desktop/system\\_requirements.htm](https://help.genesys.com/cic/mergedProjects/wh_tr/mergedProjects/wh_tr_installation_and_configuration/desktop/system_requirements.htm)

### **Customer Interaction Center Server**

The CIC server provides the telephony foundation on which the conference system is based. The server uses an Interaction Conference subsystem to host and manage the conference calls. The architecture supports one or more CIC servers.

The CIC server must have CIC 4.0 SU2 or later installed and the initial run of IC Setup Assistant must have successfully completed the initial CIC database creation. This requirement enables the Interaction Conference Plugins Install to add its tables to the CIC database.

### **Conference Resource Utilization**

Interaction Conference uses audio processing and recording resources on an Interaction Media Server associated with the host CIC server. The current release of Interaction Conference is limited to 300 unmuted participants in a conference. This temporary limit is intended to prevent large conferences of unmuted participants from consuming all of the resources on a CIC site's media servers.

### **License Requirements**

Interaction Conference requires a feature license on the main Customer Interaction Center license. The required license key is **I3\_FEATURE\_INTERACTION\_CONFERENCE**.

If the features license is not present, Interaction Conference server does not start. As a result, a user cannot schedule a conference from Interaction Conference Web Server or Outlook. Also, attendees cannot connect to a conference room.

### **Client Workstations**

Interaction Conference provides a client plugin component for Microsoft Outlook that enables users to schedule conferences from an Outlook Appointment Request. This plugin can be installed on any computer that has Microsoft Outlook 2010, Microsoft Outlook 2013, or Microsoft Outlook 2016 installed. See [Install Interaction Conference Outlook Plugin](#) for more details.

### **Conference Recordings**

You can optionally configure a conference to record the call and send the recording to the hosts or to all invitees as an attachment to an email message. Interaction Conference does not require Interaction Recorder.

# Installation Tasks

## To install Interaction Conference:

1. If you have not done so already, follow the procedure in the *PureConnect Installation and Configuration Guide* to download and copy the ICON .iso file: [https://help.genesys.com/cic/mergedProjects/wh\\_tr/mergedProjects/wh\\_tr\\_installation\\_and\\_configuration/desktop/chapter\\_11\\_cic\\_server\\_installation.htm](https://help.genesys.com/cic/mergedProjects/wh_tr/mergedProjects/wh_tr_installation_and_configuration/desktop/chapter_11_cic_server_installation.htm)
2. On the desired computer, access the share and run Install.exe from the \Installs directory.
3. Select the check box for the wanted components, then click **Install**.

**Note:** Use the install program to install the individual components listed in the table. Do not run the .msi files individually. The only exceptions are components that an administrator or user installs on a client workstation.

There are five different installation programs available with Interaction Conference.

Installation Program	Required or Optional	Client or Server	Description
InteractionConferenceWebServer_20xx_Rx.msi	Required	Web Server	Installs the Interaction Conference web application used to schedule conferences.
ICServer_IConferencePlugins_20xx_Rx.msi	Required	CIC Server	Installs the Interaction Conference plugin for Interaction Administrator, sets a server parameter, copies other installs to shares, and prepares the CIC Server for Interaction Conference.
MSOutlook_IConferencePlugins_20xx_Rx.msi	Optional	Client	Installs the Interaction Conference plugin on workstations with Microsoft Outlook
ICServerManagerApps_IConferencePlugins_20xx_Rx.msi	Optional	Client	Run on workstations where Interaction Administrator is installed and administrators configure Interaction Conference.
SessionManager_IConferencePlugins_20xx_Rx.msi	Optional	Off-Server Session Manager	Installs a separate Session Manager plugin on Off-Server Session Manager (OSSM) servers for sites with over 2000 users and large numbers of conferences.

## To install and configure Interaction Conference, complete the following tasks. The installation tasks are:

1. [Install the Interaction Conference Web Server application on an IIS web server.](#)

**InteractionConferenceWebServer\_20xx\_Rx.msi** installs the web application used to schedule conferences. Select this on a server that has Internet Information Server (IIS) installed. You can optionally run the Interaction Conference Web Server install on a web server hosting other applications, including PureConnect applications and features

The Interaction Conference Web Server (.msi) installation program is included in the Interaction Conference .iso download files available on the PureConnect Product Downloads page: <https://help.genesys.com/pureconnect/secure/Downloads.aspx>

2. [Install Interaction Conference Plugins on CIC servers.](#)

**ICServer\_IConferencePlugins\_20xx\_Rx.msi** enhances Interaction Administrator by adding the Interaction Conference container, which manages general configuration settings and details about conference rooms, including virtual conference rooms. The installation adds a required server parameter, creates an Outlook Plugin install share for users, and starts the IConference subsystem.

3. [Optionally install Interaction Conference plugins on Off-Server Session Manager servers.](#)

**SessionManager\_IConferencePlugins\_20xx\_Rx.msi** is for large CIC sites that have more than 2000 users, who have elected to run one or more Off-Server Session Manager Servers. Do not select this unless you run Session Manager on dedicated servers. Do not select this on CIC servers.

4. [Install the Interaction Conference Outlook plugin on client PCs that have Outlook installed.](#)

Installation of Interaction Conference components on CIC places **MSOutlook\_IConferencePlugins\_20xx\_Rx.msi** in a share that users can access to install the Interaction Conference Outlook plugin. The Outlook plugin makes it possible for Outlook users to schedule a conference within an Outlook Appointment. Administrators can notify users that the install program in this share is available. Administrators can also set up a [group policy](#) to install this component.

5. If you run Interaction Administrator on a workstation (not the CIC server), select **ICServerManagerApps\_IConferencePlugins\_20xx\_Rx.msi** to update Interaction Administrator for compatibility with Interaction Conference. Installation does not require configuration decisions. Running the .msi on a client workstation is a fast process. Before a user can configure or edit Interaction Conference resources in Interaction Administrator, that user must have the appropriate [Admin Access](#) and Security Rights.

### Related Topics

- [Administration Procedures](#)

# Install Interaction Conference Web Server

This procedure explains how to install the Interaction Conference web server components, including the Web Administrator application – a set of .NET webpages that allow administrators to schedule and manage conference calls. This procedure assumes that the web server is operational as a prerequisite.

This section explains the typical wizard-based installation procedure, which we recommend. You can optionally install the Interaction Conference Web Administrator using command-line parameters that specify the website name, application name, and application pool name. To run the install that way, see [Optionally install Interaction Conference Web Server using command-line parameters](#).

**Note:** If you intend to use a unique or dedicated website name for Interaction Conference (rather than the default site name), define that site in IIS before you start the installation.

## On the IIS Web Server:

1. Run `InteractionConferenceWebServer_20xx_Rx.msi`.

The Interaction Conference Web Server (.msi) installation program is included in the Interaction Conference .iso download files available on the PureConnect Product Downloads page: <https://help.genesys.com/pureconnect/secure/Downloads.aspx>

2. If you are prompted to grant the program permission to run, click **Run**.
3. Click **Next** to proceed past the welcome page of the installation wizard.

If setup has been run before, you are given the option to Change, Repair, or Remove files. These options do not appear on a first-time install.

4. To change the folder in which the setup program installs Interaction Conference:

- Click **Browse** in the Custom Setup page.
- Browse to the target folder and click **OK** to select it.
- Click **Next**.

**Note:** To accept the default folder (recommended), click **Next**.

5. On the Website Information page, select the website to use with Interaction Conference:

- If you have configured more than one website, choose a site from the **WebSite Name** drop-down list.
- Use the default or type your own **Application Name** and **Application Pool Name**. The install creates an application and an application pool with the specified names.
- Click **Next**.

6. From the CIC Server Name page, enter the name of the primary CIC server that Interaction Conference connects to.
7. To complete the installation, click **Install**.
8. The final page of the wizard appears when installation is complete. Click **Finish** to close the wizard.

The installation adds a desktop icon that starts Interaction Conference Web Administrator. You can use this desktop shortcut, or you can browse to `http://{IIS_Server_Name}/interactionconference`. Log on using the appropriate administrator account on the IIS server.

Installation also adds icons for printable versions of documentation to the desktop. Documentation is provided in PDF and HTML Help formats, in the following folder:

C:\Program Files (x86)\Interactive Intelligence\Interaction Conference Web Server

Publication Title	Files
Interaction Conference Administrator's Guide	Conference_AG.pdf Conference_AG.chm
Interaction Conference User's Guide	Conference_UG.pdf Conference_UG.chm

### Related Topics

- [Installation Tasks](#)
- [Administration Procedures](#)

## Optionally install Interaction Conference Web Server using command-line parameters

This procedure explains how to run the `InteractionConferenceWebServer_20xx_Rx.msi` using command-line parameters. The method of running the installation is faster than using the wizard, and it can be useful when installing on multiple web servers, but the result is the same.

### Before you install from the command line:

- Open the Internet Information Services (IIS) Manager and create a site name for Interaction Conference, unless you want to use the default site or have already created another site.
- You can optionally create an Application Name and Application Pool Name associated with the site in IIS. Alternatively, you can specify the Application Name and Application Pool Name in the command-line parameters and the installation will add them to the specified site.
- Determine the values of the command-line parameters before you begin. The Interaction Conference Web Server installation takes four parameters.

Parameter	Description
WEBSITE_NAME	Optional. The name of the Interaction Conference site previously created in IIS. The default name is "Default Web Site"
WEBAPP_NAME	Optional. The Application Name associated with the Interaction Conference website. The default name is "InteractionConference".
WEBAPPPPOOL_NAME	Optional. The Application Pool Name associated with the Interaction Conference website. The default name is "InteractionConference".
ICSERVERNAME	Required. The name of the CIC server this web server and Interaction Conference connects to.

- Determine the command-line options you intend to use.

Option	Description
/l*v<pathlogfile>	This option allows you to specify the path and file name for the install to record its detailed steps in a log file. Without this parameter, the install uses its default logging file/location.
/qb	This option omits the installation wizard screens and just shows a progress bar and notification when the installation is complete.
/qn	This option requires full Administrator permissions and completely hides all visual indicators of the installation running. Check the log file output to determine the completion and success of the installation.

- Ensure that you have access to the InteractionConferenceWebServer\_20xx\_Rx.msi file, either locally on the web server or on a shared directory on the network.

### Running the command-line installation:

1. On the IIS server hosting Interaction Conference, open a Command Prompt window as an administrator and navigate to the drive where you want to run the installation.
2. Run the msixec command with the appropriate parameters, values, and command-line options, in the following fashion:

```
c:/ msixec /i "<pathToIConWebInstall>\InteractionConferenceWebServer_20xx_Rx.msi" /l*vx "
<PathToLogfile\LogfileName>" [/qb | /qn] WEBSITE_NAME="<Icon Site name>" WEBAPP_NAME="<Icon App Name>"
WEBAPPPPOOL_NAME="<Icon App Pool Name>" ICSERVERNAME="<ICServerName>"
```

**Note:** Use quotes around all file paths and values that include spaces; you can optionally use quotes even if no spaces are included.

3. Depending on the options you specified, the installation runs with full, minimal, or no visual interface and the results are recorded in an installation log file.

### Example

In this example, the InteractionConferenceWebServer\_20xx\_Rx.msi file is in a local directory on the web server, and the installation uses the following parameters and options.

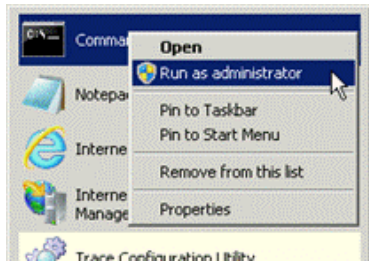
Parameter	Description
WEBSITE_NAME	"I3 Conferences", previously defined in IIS. See image.
WEBAPP_NAME	Use the default "InteractionConference" and omit this parameter.
WEBAPPPPOOL_NAME	Use the default "InteractionConference" and omit this parameter.
ICSERVERNAME	"HQCommServer"

Option	Description
/l*vx <pathlogfile>	Create the installation log file: "C:\Installs\IConferenceWebInstall.log"
/qb	Run the install in minimized mode.





Right-click and open a Command Prompt window with administrator permissions (if that is not the default).



The following command line reflects the example parameters and options:

```
C:\>msiexec /i "C:\Installs\InteractionConferenceWebServer_20xx_Rx.msi" /qb /l*vx
"C:\Installs\IConferenceWebInstall.log" WEBSITE_NAME="I3 Conferences" ICSERVERNAME="HQCommServer"
```

**Note:** There is a space between each option and parameter/value pair, but there is no space around the equal (=) sign within a parameter/value pair.

## Install Interaction Conference Plugins for CIC Server

The installation program named `ICServer_IConferencePlugins_20xx_Rx.msi` installs Interaction Conference components on the CIC server and enhances Interaction Administrator by adding the Interaction Conference container. You use the Interaction Conference configuration container to manage general configuration setting and details about conference rooms, including virtual conference rooms. For more information about what the IC Server IConference Plugin install does, see [Results of the Interaction Conference plugins Install on the CIC Server](#).

### Switchover Considerations

Special considerations apply if you are installing this software in a switchover environment. The upgrade process makes changes to Directory Services during the install. If a switchover server is active during the install, changes made by installation are lost.

To avoid this problem, make sure the servers in the switchover environment are not in a valid switchover state. Then install this update on both the primary and secondary servers. That step prevents the switchover system from wiping Directory Services entries before they are installed on the other machine.

## To install the Interaction Conference plugins and related components on the CIC server:

**Note:** Before you run this installation program, be sure you have completed the initial run of IC Setup Assistant on your CIC server. This ensures the CIC database properly exists and that the Interaction Conference plugins install can update the database when it runs.

1. Run `ICServer_IConferencePlugins_20xx_Rx.msi` on the CIC server.
2. When the Welcome page appears, click **Next**.
3. Review the Switchover considerations. When you are ready to proceed, click **Install**.
4. The installation program starts IC Setup Assistant to apply a required database update. The subsequent dialogs require you log on to your SQL or Oracle database server to apply the update. From the Database Configuration page, click **Proceed** to continue.
5. IC Setup Assistant detects the database platform your CIC system is using and selects it. Click **Next** to continue.
6. Use your CIC database credentials to log on and allow Setup Assistant to apply the needed script to prepare for Interaction Conference. Click **Next** to continue.

IC Setup Assistant applies the database script and continues to install the rest of the Interaction Conference plugin and client installs.

7. When installation ends:

- Read the "Important Note" in the Completed dialog box.
- Click **Finish** to close the setup program.
- Restart the CIC server to pick up the changes.

**Important Note:** To activate the changes, restart the CIC server. Interaction Conference does not work until the server is restarted. Restarting is necessary only the first time you run the install. You do not need to restart following an update install.

## Results of the Interaction Conference Plugins Install on the CIC Server

In addition to the database script update, the following changes occur on the CIC server after running the `ICServer_IConferencePlugins_20xx_Rx.msi` install.

### Server Parameter

Installation adds an CIC server parameter named "Interaction Conference Support," with a value of "1." This parameter tells Interaction Administrator to display the Interaction Conference container. Do not modify this server parameter.

### Client Install Share

The Interaction Conference Plugins install creates a folder that CIC users can access to install the Interaction Conference Outlook plugin. The Outlook plugin makes it possible for Outlook users to schedule a conference within an Outlook Appointment.

The install creates a directory `<drive>\I3\IC\Install\InteractionConferenceMSOutlookPlugin` and creates a shared directory with all users having Read and Execute permissions on the share. The shared directory is `\\<CICServerName>\IC_InteractionConferenceMSOutlookPlugin` and it contains the `MSOutlook_ICPlugins.msi` installation program.

The *Interaction Conference User's Guide* provides users with instructions for using the plugin.

### New Subsystem in IC System Manager

Installation adds an "IConference" subsystem to CIC, which you can manage using *IC System Manager*. Specifically it adds a process named `ICOnU.exe`. Installation also creates keys in Directory Services that CIC uses to detect the existence of the Interaction Conference plugin for Interaction Administrator. If you run IC System Manager on the CIC server, it displays the status of the IConference subsystem, as shown. The install starts this system automatically.

Subsystem	S	Status	Startup Type	PID	Elapsed Time	CPU Usage	Memory Usage	Virtual Memory	Thread Count	Handle Count
FacServer	28	Started	Automatic	5088	0 days, 0 hours, 1 minutes, 30 seconds	0	16336	6900	33	239
IConference	29	Started	Automatic	3504	0 days, 0 hours, 1 minutes, 28 seconds	0	16436	5984	10	176
IpServer	30	Started	Automatic	4380	0 days, 0 hours, 1 minutes, 26 seconds	0	15856	6024	10	159
IPSServer	31	Started	Automatic	4440	0 days, 0 hours, 1 minutes, 24 seconds	0	13076	4716	6	136
StatServer	32	Started	Automatic	4512	0 days, 0 hours, 1 minutes, 22 seconds	0	15124	5284	7	140
WebProcessor	33	Started	Automatic	4616	0 days, 0 hours, 1 minutes, 20 seconds	0	14192	5128	12	296
IP	34	Started	Automatic	4304	0 days, 0 hours, 1 minutes, 18 seconds	0	79128	66628	15	245
Thin IP Bridge	35	Started	Automatic	4552	0 days, 0 hours, 1 minutes, 9 seconds	0	14212	5608	15	235

### Related Topics

- [Installation Tasks](#)
- [Administration Procedures](#)

## Apply the Interaction Conference License

Interaction Conference requires a feature license on the main Customer Interaction Center license. The required license key is `I3_FEATURE_INTERACTION_CONFERENCE`.

If the features license is not present, Interaction Conference server does not start. As a result, a user cannot schedule a conference from Interaction Conference Web Server or Outlook. Also, attendees cannot connect to a conference room.

See the *License Configuration* topic in the Interaction Administrator help for instructions about applying licenses.

## Optionally install Session Manager IConference plugins on Off-Server Session Manager servers

Interaction Conference includes an optional install program that is required only when a site uses the Off-Server Session Manager server. Large CIC sites with more than 2000 users can choose to run Session Manager on stand-alone servers. Most sites do not require this level of performance, but for large sites that do, Interaction Conference requires you to install an additional component on each dedicated Session Manager server.

This install deploys a single component (ININ.SMExtIcon.dll) that provides an application layer between Interaction Conference and the Off-Server Session Manager. An Off-Server Session Manager must be installed as a prerequisite to running this install.

---

### From each Off-Server Session Manager Server:

1. Run **SessionManager\_IConferencePlugins.msi** from the distribution media.
2. Wait for the install to finish. A message appears when installation is complete. Dismiss this message to close the installer application.
3. Restart the Off-Server Session Manager server to apply the changes. If you do not restart now, Interaction Conference will not be functional until the next time the server is restarted. The restart requirement is necessary only the first time the install is run. There is no need to restart following an update install.

## Install Interaction Conference Outlook Plugin

This procedure explains how to install Interaction Conference Outlook plugin for Microsoft Outlook. This plugin enables you to schedule conferences within Microsoft Outlook 2010, Microsoft Outlook 2013, or Microsoft Outlook 2016. Run this installation on each workstation where a CIC user needs schedule conference calls. The **MSOutlook\_IConferencePlugins\_20xx\_Rx.msi** is located in the **IC\_InteractionConferenceMSOutlookPlugin** shared directory on the CIC server.

---

### Prerequisites for Installing Interaction Conference Outlook Plugin

The **MSOutlook\_IConferencePlugins\_20xx\_Rx.msi** installation program checks for the following requirements and does not continue until the prerequisites are met.

- **Microsoft Outlook 2010, Microsoft Outlook 2013, or Microsoft Outlook 2016**  
The Interaction Conference Outlook Plugin requires a 32-bit installation of Microsoft Outlook. The 64-bit versions of Microsoft Outlook are not supported.
- **Microsoft .NET Framework 4 (Full)**. The install looks for version 4.0.3031 or later.  
If you do not have this version of the .NET Framework installed, use the **dotNetFx40\_Full\_x86\_x64.exe** installation program on the **IC\_WorkstationPreReq** shared directory on your CIC server. For example, **\\CICServer\IC\_WorkstationPreReq**, where **CICServer** is the actual name of your CIC server.
- **Visual Studio Tools for Office version 4.0**. The install looks for version 10.0.31119 or newer.  
If you do not have these tools installed, use the **VSTOR40\_x64.msi** or **VSTOR40\_x86** installation program on the **IC\_WorkstationPreReq** shared directory on your CIC server version 4.0 SU3 or newer. For example, **\\CICServer\IC\_WorkstationPreReq**, where **CICServer** is the actual name of your CIC server.
- **2010 Primary Interop Assemblies for Microsoft Outlook 2010, Microsoft Outlook 2013, or Microsoft Outlook 2016**  
The primary interop assemblies are installed with certain features in Microsoft Office, but if those features are not installed, you must install them separately. For example with Microsoft Outlook 2010, use the **o2010pia.msi** installation program on the **IC\_WorkstationPreReq** shared directory on your CIC server version 4.0 SU3 or newer. For example, **\\CICServer\IC\_WorkstationPreReq**, where **CICServer** is the actual name of your CIC server.

The plugin supports both the 32-bit and the 64-bit version of Interaction Client.

Note: if you have Interaction Conference 3.0 Outlook plugin installed, uninstall it first before running the 4.0 install.

To install the Interaction Conference 4.0 Outlook plugin on a workstation:

1. Start Windows Explorer (for example, open Computer or your Documents folder).
2. Type **\\CICServerName\IC\_InteractionConferenceMSOutlookPlugin** in the address field, replacing *CICServerName* with the name of your CIC server. Press **Enter**. If this folder does not exist, contact your network administrator. It is created when Interaction Conference components are installed on the CIC server.
3. Run (double-click) **MSOutlook\_IConferencePlugins\_20xx\_Rx.msi** from the folder on the CIC server. If your workstation does not have one or more of the prerequisites installed, you see a message telling you to install it first. See the Prerequisites for Installing Interaction Conference Outlook Plugin for instructions. Otherwise, click **Yes** when prompted to allow the program to run.
4. Wait for the install to finish. A message appears when installation is complete. Click **OK** to close the installer application.
5. If Outlook was running when you ran the install, close and restart Outlook before proceeding. The Interaction Conference plugin does not appear until Outlook is restarted.

#### Related Topics

- [Installing the Interaction Conference Outlook Plugin using a Group Policy](#)

---

## Installing the Outlook Plugin using a Group Policy

Network administrators can optionally distribute the Interaction Conference Outlook Plugin installation file to client workstations instead of performing individual client workstation installations. A silent installation can provide this functionality. This topic explains how to distribute the .msi installation file across many workstations using a Visual Basic script in a network policy.

For more information about installing CIC workstation applications via group policy, see *Group Policy Deployment for CIC Applications Technical Reference* in the PureConnect Documentation Library.

A group policy script references the prerequisite installs and the Interaction Conference Outlook Plugin install, both of which must be accessible on a shared directory that all client workstations can access. If the workstation does not meet the requirements for the Interaction Conference Outlook plugin, the script

can apply the installs to meet those requirements before proceeding to the Outlook Plugin install itself. Record the \\Server\InstallShareName information for both the prerequisite and primary installation programs. These server/share names are needed in the group policy script.

In the following sample script, it looks for the three essential requirements:

- **Microsoft Outlook (32-bit version only)** – If not found, the script and installation program does not run.
  - **Visual Studio Tools for Office version 4.0** - The install looks for version 10.0.31119 or newer. If you do not have CIC 4.0 SU3 installed, search the Microsoft website and download vstor\_redist.exe to get the required installation program.
  - **Microsoft Office 2010 Primary Interop Assemblies** – Installs with o2010pia.msi
1. Create a Visual Basic script for the group policy to use. You can use the following script as a template or starting point, but you must customize it to fit your environment. You can copy and paste this script into Notepad as a starting point. Then edit the **<PathToOutlookAddInShare>** and **<PathToWorkStationPreReqShare>** placeholders and replace them with your local \\Servername\InstallShare names on your network.

'script to install version 4.x Interaction Conference plugins for Microsoft Outlook and pre-reqs

pluginShare="<PathToOutlookAddInShare>"

preReqShare="<PathToWorkStationPreReqShare>"

clientGUID="{0E65D294-C977-4420-B84E-D6CE2C850574}"

clientApp="MSOutlook\_IConferencePlugins\_20xx\_Rx.msi"

interopProductCode="{90140000-1146-0000-0000-00000000FF1CE}"

interopInstall="o2010pia.msi"

officeRuntimeAgnosticInstall="vstor\_redist.exe"

officeRuntime64Install="vstor40\_x64.exe"

officeRuntime32Install="vstor40\_x86.exe"

minVersion="10.0.31119"

Dim installer : Set installer = Nothing

Set installer = Wscript.CreateObject("WindowsInstaller.Installer")

Set WShell = Wscript.CreateObject("Wscript.Shell")

Set objShell = CreateObject("Shell.Application")

Const msilInstallStateLocal = 3

Const msilInstallStateDefault = 5

Const FILEVER\_RC\_F1\_EQUAL\_F2 = 0

Const FILEVER\_RC\_F1\_LESS\_THAN\_F2 = -1

Const FILEVER\_RC\_F1\_GREATER\_THAN\_F2 = 1

'creates a timestamp to make log name unique

timestamp=Year(Now) & Month(Now) & Day(Now) & Hour(Now) & Minute(Now) & Second(Now)

'sets defaultTempDir to user temp directory

strTempDir = WShell.ExpandEnvironmentStrings("%temp%") & "\"

Set fso = CreateObject("Scripting.FileSystemObject")

Set objTextFile = fso.OpenTextFile(strTempDir & "\IConferencePluginsMSOutlook\_script.log", 8, True)

logit("Script started " & Now())

numBits = GetBitness()

outlookInstalled=checkOutlook(numBits)

if outlookInstalled=true then

'checks pre-reqs

interopPreReqInstalled=checkPreReq(interopProductCode)

officeRuntimePreReqInstalled=checkVSTO(numBits)

```
agnosticOfficeRuntimeFound=fso.FileExists(preReqShare & "\" & officeRuntimeAgnosticInstall)
```

```
'Installs pre-reqs if needed
```

```
if interopPreReqInstalled=false then
```

```
logit("Microsoft Office 2010 Primary Interop Assemblies is not installed and is a pre-req. Installing Microsoft Office 2010 Primary Interop Assemblies")
```

```
InstallPath=preReqShare & "\" & interopInstall
```

```
commandline="msiexec /i " & InstallPath & " /!vx %temp%\ " & replace(interopInstall,".msi","_install_" & timestamp & ".log") & " /q REBOOT=R"
```

```
logit("Executing " & commandline)
```

```
r=wshell.run(commandline,0,true)
```

```
end if
```

```
'Installs VSTOR. Since the newer VSTOR is architecture agnostic, checks to see if that VSTOR is available and installs it.
```

```
'If the agnostic VSTOR is not available, then relies on the bitness of the system to install the correct VSTOR.
```

```
if officeRuntimePreReqInstalled=false then
```

```
logit("Microsoft Visual Studio 2010 Tools for Office Runtime is not installed and is a pre-req.")
```

```
if agnosticOfficeRuntimeFound=true then
```

```
logit("Universal Microsoft Visual Studio 2010 Tools for Office Runtime found. Installing Microsoft Visual Studio 2010 Tools for Office Runtime")
```

```
InstallPath=preReqShare & "\" & officeRuntimeAgnosticInstall
```

```
commandline=InstallPath & " /!vx %temp%\ " & replace(officeRuntimeAgnosticInstall,".exe","_install_" & timestamp & ".log") & " /q REBOOT=R"
```

```
logit("Executing " & commandline)
```

```
r=wshell.run(commandline,1,true)
```

```
elseif numBits="32" then
```

```
logit("Installing Microsoft Visual Studio 2010 Tools for Office Runtime (x86)")
```

```
InstallPath=preReqShare & "\" & officeRuntime32Install
```

```
commandline=InstallPath & " /!vx %temp%\ " & replace(officeRuntime32Install,".exe","_install_" & timestamp & ".log") & " /q REBOOT=R"
```

```
logit("Executing " & commandline)
```

```
r=wshell.run(commandline,1,true)
```

```
elseif numBits="64" then
```

```
logit("Installing Microsoft Visual Studio 2010 Tools for Office Runtime (x64)")
```

```
InstallPath=preReqShare & "\" & officeRuntime64Install
```

```
commandline=InstallPath & " /!vx %temp%\ " & replace(officeRuntime64Install,".exe","_install_" & timestamp & ".log") & " /q REBOOT=R"
```

```
logit("Executing " & commandline)
```

```
r=wshell.run(commandline,1,true)
```

```
end if
```

```
end if
```

```
'installs clientApp
```

```
InstallPath=pluginShare & "\" & clientApp
```

```
commandline="msiexec /i " & InstallPath & " /!vx %temp%\ " & replace(clientApp,".msi","_install_" & timestamp & ".log") & " /q"
```

```
logit("Executing " & commandline)
```

```
r=wshell.run(commandline,1,true)
```

```
end if
```

```
logit("Script completed" & vbcrLf & vbcrLf)
```

```
objTextFile.close
```

```
'writes message to logfile.
```

```
Function logit(strMessage)
```

```
objTextFile.WriteLine FormatDateTime(Now(),vbLongTime) & vbtabs & strMessage
End Function
```

```
function checkPreReq(productGUID)
If installer.ProductState(productGUID)=msiInstallStateLocal Or installer.ProductState(productGUID)=msiInstallStateDefault Then
    checkPreReq=true
Else
    checkPreReq=false
end if
End Function
```

'checks to see if Outlook is installed

```
Function checkOutlook(bitness)
Set oShellreg = CreateObject("WScript.Shell")
If bitness="32" Then sRegKey = "HKLM\SOFTWARE\Microsoft\Office\14.0\Outlook\InstallRoot\"
If bitness="64" Then sRegKey = "HKLM\SOFTWARE\Wow6432Node\Microsoft\Office\14.0\Outlook\InstallRoot\"

sRegValue = "" ' init value in case value does not exist
On Error Resume Next
sRegValue = oShellreg.RegRead(sRegKey & "Path")
On Error Goto 0

If sRegValue <> "" Then
    checkOutlook=True
    logit("Microsoft Outlook 2010 32-bit is installed.")
Else
    checkOutlook=False
    logit("Microsoft Outlook 2010 32-bit is not installed.")
End If

set oShellreg=nothing
End Function
```

'checks to see if VSTO is installed

```
Function checkVSTO(bitness)
Set oShellreg = CreateObject("WScript.Shell")
If bitness="32" Then sRegKey = "HKLM\SOFTWARE\Microsoft\VSTO Runtime Setup\v4R\"
If bitness="64" Then sRegKey = "HKLM\SOFTWARE\Wow6432Node\Microsoft\VSTO Runtime Setup\v4R\"

sRegValue = "" ' init value in case value does not exist
On Error Resume Next
sRegValue = oShellreg.RegRead(sRegKey & "Version")
On Error Goto 0

'compare retrieved value versus teh minimum required value
compResult=CompareFileVersions(sRegValue,minVersion)

If compResult=1 Or compResult=0 Then
    checkVSTO=True
    logit("VSTO version " & sRegValue & " meets requirement")
Else
    checkVSTO=False
```

```

logit("VSTO version " & sRegValue & " does not meet requirement and will be installed.")
End If
set oShellreg=nothing
End Function

```

```

function CompareFileVersions(VerF1, VerF2)
'WScript.Echo "CompareFileVersions() "" & VerF1 & "" with "" & VerF2 & ""
' logit("CompareFileVersions() "" & VerF1 & "" with "" & VerF2 & """)
on error resume next
CompareFileVersions = FILEVER_RC_F1_EQUAL_F2

'----- Split up the version numbers -----
dim VerBitsF1 : VerBitsF1 = split(VerF1, ".")
dim VerBitsF2 : VerBitsF2 = split(VerF2, ".")
'----- How many "bits" are there (use largest of the two) -----
dim LastIndex : LastIndex = ubound(VerBitsF1)
if ubound(VerBitsF2) > LastIndex then
    LastIndex = ubound(VerBitsF2)
end if

'----- Work through each of the bits (probably 4) -----
dim i
for i = 0 to LastIndex
    '- Work out the 2 "bits" to compare (use "0" on shorter versions) -
    dim BitF1, BitF2
    if i <= ubound(VerBitsF1) then BitF1 = VerBitsF1(i) else BitF1 = ""
    if i <= ubound(VerBitsF2) then BitF2 = VerBitsF2(i) else BitF2 = ""
    if BitF1 = "" then BitF1 = "0"
    if BitF2 = "" then BitF2 = "0"

    '----- Compare the values (exit when mismatch found) -----
    ' wscript.echo "Comparing level #" & i+1 & "": " & BitF1 & "" with "" & BitF2 & ""

    if cint(BitF1) > cint(BitF2) then
        ' wscript.echo "" & BitF1 & "" is greater than "" & BitF2 & ""
        CompareFileVersions = FILEVER_RC_F1_GREATER_THAN_F2
    else
        if cint(BitF1) < cint(BitF2) then
            ' wscript.echo "" & BitF1 & "" is less than "" & BitF2 & ""
            CompareFileVersions = FILEVER_RC_F1_LESS_THAN_F2
        end if
    end if

    if CompareFileVersions <> FILEVER_RC_F1_EQUAL_F2 then exit for
next
' wscript.echo "Compare answer is " & CompareFileVersions
end function

```

```

Function GetBitness()
Set WshShell = CreateObject("WScript.Shell")
Set WshProcEnv = WshShell.Environment("Process")

```

```
process_architecture= WshProcEnv("PROCESSOR_ARCHITECTURE")

If process_architecture = "x86" Then
    system_architecture= WshProcEnv("PROCESSOR_ARCHITECTURE")
    If system_architecture = "" Then
        GetBitness="32"
        logit("32-bit Operating System detected.")
    End if
Else
    GetBitness="64"
    logit("64-bit Operating System detected.")
End If

End Function
```

2. The script must be configured to run as a machine policy with local administrator rights.
3. After the script is finished, you can check the installation log files in the user's %temp% folder on the workstation, to see the results of the installation.

**Important:** Always test this procedure for one or two client workstations before attempting to distribute the install to many workstations.



## Define Servers and Server Options

Interaction Conference uses one or more servers to host conferences. If the primary CIC server that the Interaction Conference web server references changes, or if you add new CIC servers to your system, edit an XML file called **Configuration.xml** to reflect the change. This file is in the Interaction Conference folder on the web server. You do not need XML expertise to define your servers in this file, but you must carefully edit the file.

---

### To define servers and server options:

1. Locate the XML file **Configuration.xml** in your Interaction Conference folder on the web server. For example: C:\Program Files (x86)\Interactive Intelligence\Interaction Conference Web Server
2. Open the file in Windows Notepad or an XML editor. The file contains this XML code:

```
<?xml version="1.0" encoding="utf-8" ?>
<Config>
  <Servers>
    <Server>
      <Host>YourCICServerName</Host>
      <DisplayName>YourCICServerName</DisplayName>
    </Server>
  </Servers>
  <AutoSelectServer>>false</AutoSelectServer>
</Config>
```

3. The red text with YourCICServerName contains the name of the CIC server you entered as part of the Interaction Conference Web Administrator installation. If your CIC server changes, edit the Host and DisplayName fields.
  - a. Between **<Host>** and **</Host>**, type the name of the CIC server hosting Interaction Conference.
  - b. Between **<DisplayName>** and **</DisplayName>**, type a user-friendly CIC server name to display.
4. If needed, add more servers:
  - a. Copy the text from **<Server>** to **</Server>** and paste to the line just above **</Servers>**.
  - b. Repeat steps 3(a) and 3(b) to edit the server information.

Note: Do not add switchover (backup) servers here. This Configuration.xml file is only for the primary CIC server names.

5. Set the AutoSelect option:
  - a. To make Interaction Conference log on to all the servers you have defined, type **true** between **<AutoSelectServer>** and **</AutoSelectServer>**. The line looks like the following:

```
<AutoSelectServer>>true</AutoSelectServer>
```
  - b. To require the conference creator to select the server on the logon page, type **false** between **<AutoSelectServer>** and **</AutoSelectServer>**. The line looks like the following:

```
<AutoSelectServer>>false</AutoSelectServer>
```
6. Save and close the XML file.

# Administration Procedures

A user can use the Interaction Conference plugin for Microsoft Outlook or the Web interface to schedule calls. Administrators use containers in Interaction Administrator and the ASP.Net web application to manage settings and conferences.

- [Assign right to configure global settings.](#)

Once this right is assigned, a user can configure global Interaction Conference settings, using the Interaction Conference Container in Interaction Administrator.

- [Assign right to manage individual conference rooms.](#)

Users with this right can modify the configuration of specific conference rooms, or all conference rooms if \*[All] is granted.

- [Assign right to create and modify conferences.](#)

Users with this right can create and modify the conferences they created, or optionally manage all conferences.

- [Establish general configuration settings.](#)

This procedure explains how to use the Interaction Conference container in Interaction Administrator to configure settings that apply to all conferences. These settings are configured in the Interaction Conference Container and the Conference Rooms node. This procedure must be performed once before Interaction Conference can be used. The [right to configure global settings](#) must have been previously granted at the default user, user, role, or workgroup level.

- [Define conference rooms.](#)

When Interaction Conference components are installed on a CIC or EIC server, a new *Interaction Conference* container is added to Interaction Administrator, the primary application used to administer CIC servers. Define at least one conference room before scheduling an Interaction Conference. Additional conference rooms can be defined at any time.

- [Configure Interaction Conference phone numbers and stations.](#)

Before or after you define a conference room, create a phone number for external parties and an internal station with an extension and link them together, so internal (CIC users) and external guests are in the same room.

- [Define email templates.](#)

This procedure shows how the administrator can create email message templates for meeting invitations and cancellations.

## Related Topics

- [Installation Tasks](#)

## Assign rights to configure global Interaction Conference settings

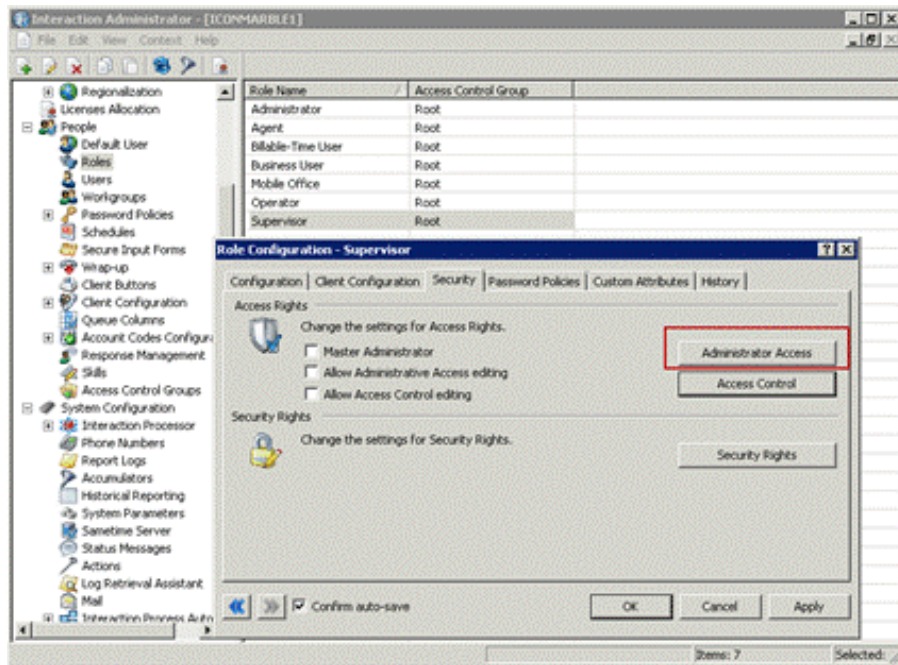
To configure Interaction Conference settings, a user must have the Interaction Conference administrative access rights. You can set access at the default user, user, role, and workgroup level. With these access rights, a user can configure global Interaction Conference settings, using the Interaction Conference Container in Interaction Administrator.

---

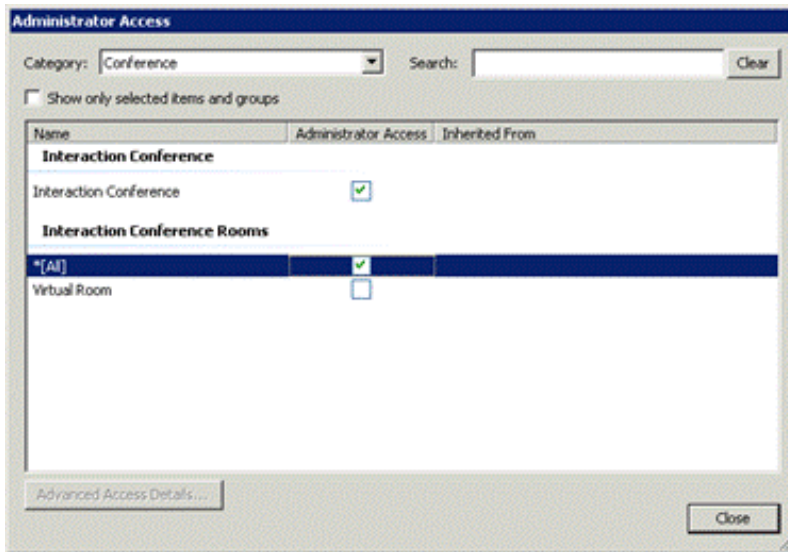
### To assign rights to configure global settings:

1. Start Interaction Administrator.
2. Open the tab for an individual user, role, or workgroup.
3. Select the **Security** tab and then click **Administrator Access**.

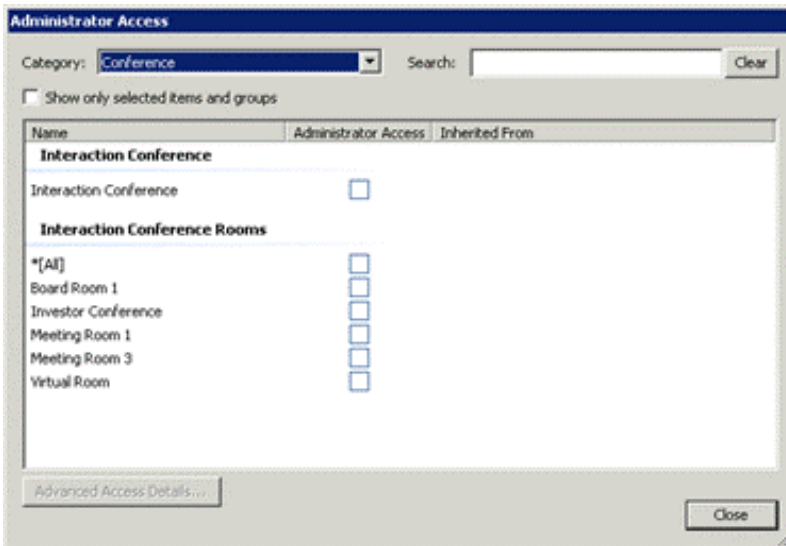
Note: If an administrator account has Master Administrator rights, the Administrator Access button is not available, and that account automatically has all administrator rights.



4. On the Administrator Access dialog, in the Category drop down list, select Conference to display the Interaction Conference Administrator Access options.



5. Select the **Interaction Conference** check box to give this user, role, or workgroup members administrator access to the Interaction Conference configuration container in Interaction Administrator.
6. If this user, role, or workgroup also needs access to control all Interaction Conference Rooms, select the **\*[All]** check box. Later, after configuring individual conference rooms, you can use the same dialog to grant individual users, roles, or workgroups access rights to manage specific conference rooms.



7. Click **Close** to exit the **Administrator Access** dialog, and click **Apply** on the **Security** page to commit the changes.

### Related Topics

- [Administration Procedures](#)
- [Installation Tasks](#)

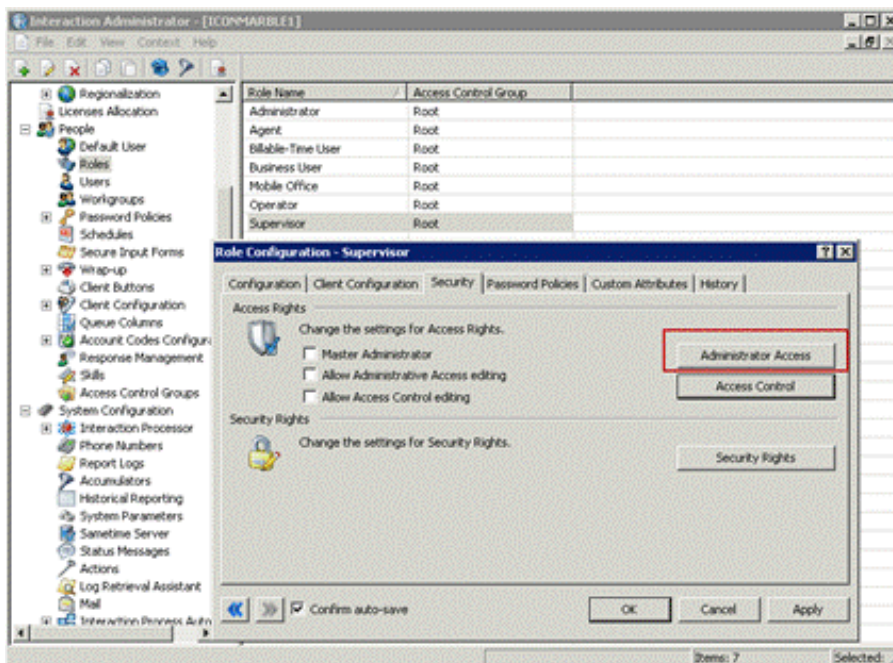
## Assign rights to manage individual conference rooms

To configure one or more Interaction Conference Room settings, a user must have the Interaction Conference Room administrative access rights. You can set access at the default user, user, roles, and workgroup level. With these access rights, a user can configure individual Interaction Conference Room settings, under the Interaction Conference Container in Interaction Administrator.

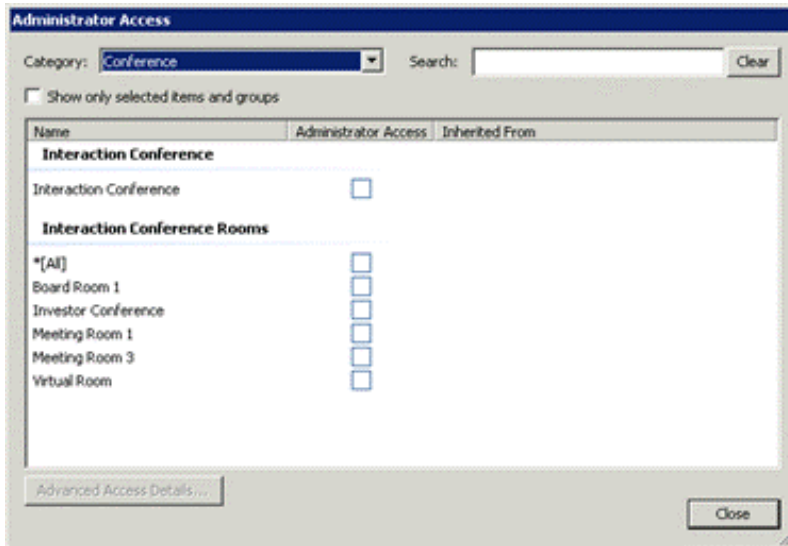
To assign rights to configure individual conference room settings:

1. Start Interaction Administrator.
2. Open the property sheet for an individual user, role, or workgroup.
3. Select the **Security** tab and then click **Administrator Access**.

**Note:** If an Administrator account has Master Administrator rights, the Administrator Access button is not available, and that account automatically has all Administrator rights.



4. On the **Administrator Access** dialog, in the **Category** drop down list, select **Conference** to display the Interaction Conference Administrator Access options.



5. Select the **\*[All]** check box to give this user, role, or workgroup members administrator rights to configure all Interaction Conference rooms in Interaction Administrator. You can optionally select individual rooms for each user, role, or workgroup member to control.
6. Click **Close** to exit the **Administrator Access** dialog, and click **Apply** on the **Security** page to commit the changes.

#### Related Topics

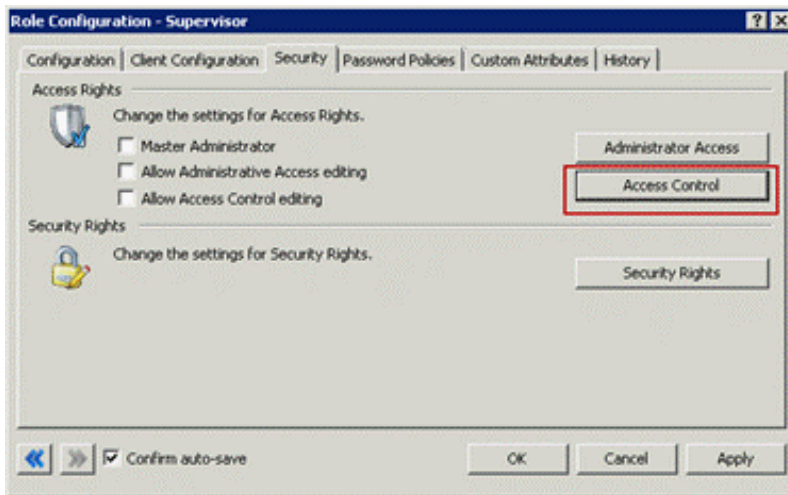
- [Administration Procedures](#)
- [Installation Tasks](#)
- For more information about using these pages in Interaction Administrator, see the Interaction Administrator help topic for Administrator Access.

## Restrict rights to use conference rooms

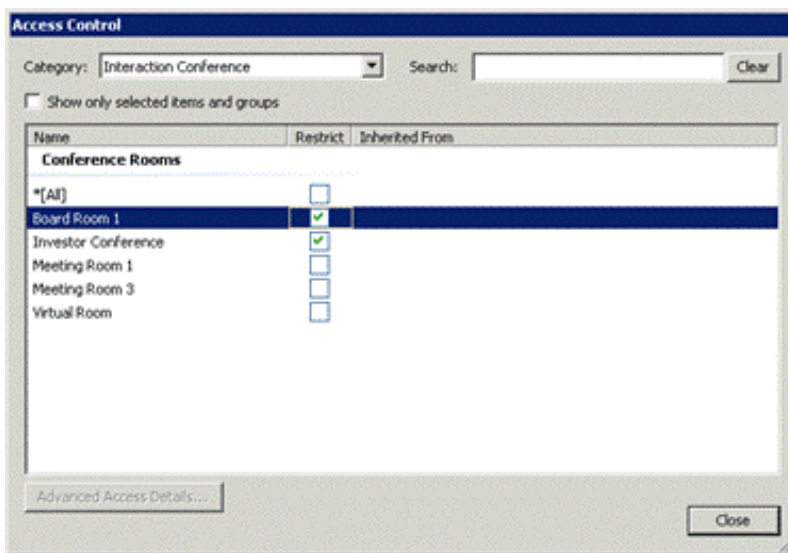
By default, users have access to all conference rooms. The administrator can block users, roles, or workgroups from having access to specific conference rooms.

### To restrict access to a conference room:

1. Start Interaction Administrator.
2. Open the property sheet for an individual user, role, or workgroup.
3. Select the **Security** tab and then click **Access Control**.



- On the **Access Control** dialog, in the **Category** drop down list, select **Interaction Conference** to display the Conference Rooms previously defined.



- Select the check box in the **Restrict** column beside one or more conference rooms that this user, role, or workgroup does not have access rights.
- Click **Close** to exit the **Access Control** dialog, and click **Apply** on the **Security** page to commit the changes.

**Note:** You can also set this restriction at the role or workgroup level for users to inherit. To inherit this restriction from a role or workgroup, set the:

- Conf Room Restrict Role server parameter to True to enable the role restriction inheritance.
- Conf Room Restrict Workgroup server parameter to True to enable the workgroup restriction inheritance.

Restart the IConference subsystem after you set either of the server parameters in order for the change to take effect.

#### Related Topics

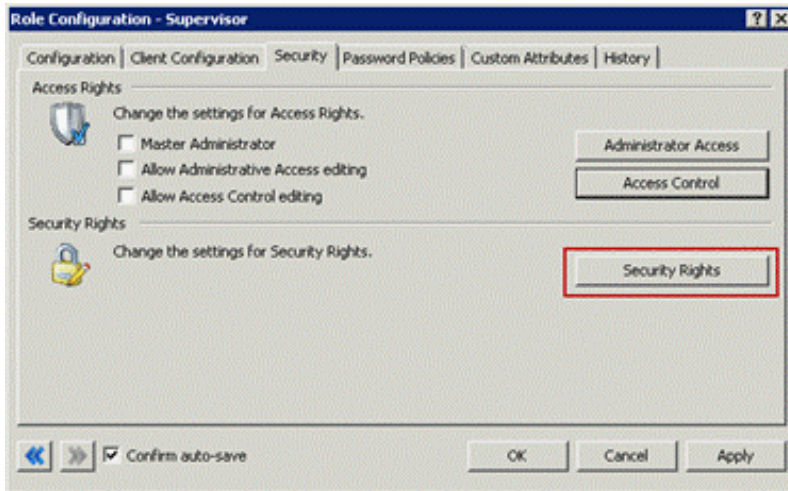
- [Administration Procedures](#)
- [Installation Tasks](#)
- For more information about using these pages in Interaction Administrator, see the Interaction Administrator help topic for Access Control.

## Assign rights to create and modify conferences

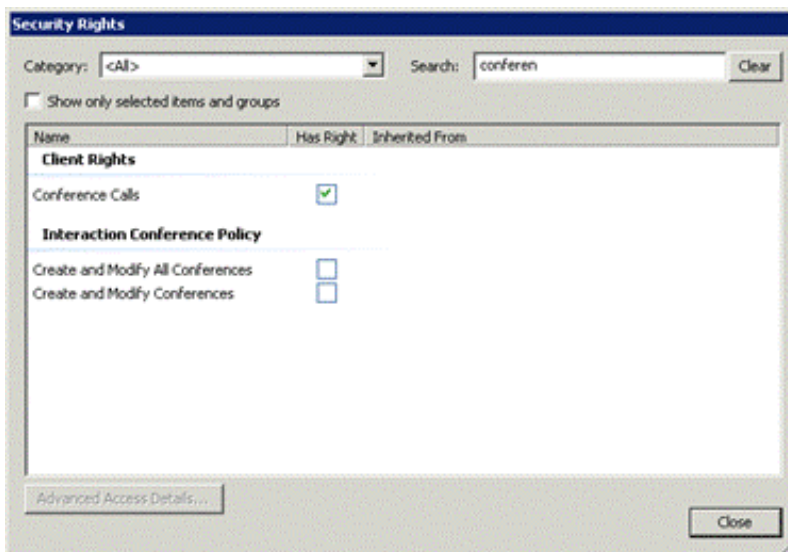
There are separate rights that enable users to create conference calls from Interaction Client, and other rights that enable users to create and modify conferences in Interaction Conference. These rights are controlled in the **Security Rights** dialog in Interaction Administrator.

## To assign rights to create conference calls and to create and modify conferences:

1. Start Interaction Administrator.
2. Open the property sheet for a user, default user, role, or workgroup.
3. Select the **Security** tab and then click **Security Rights**.



4. On the **Security Rights** dialog, the default Category is <All>, to display all security rights. To filter this list down to rights associated with Interaction Conference, in the **Search** field, start to type "*conference*". The list is trimmed down to **Client Rights** (at the **User** level) and **Interaction Conference Policy** (at the **Application** level). You can optionally display one category at a time in the **Category** drop-down list.



5. To give the user the rights to place conference calls, select the check box beside **Conference Calls**.

To give the user rights to create and modify all conferences in Interaction Conference, regardless of who created it, select the **Create and Modify All Conferences** check box.

To give the user rights to create and modify conferences that this user created (even as a member of a role or workgroup), select the **Create and Modify Conferences** check box.

6. Click **Close** to exit the **Security Rights** dialog, and click **Apply** on the **Security** page to commit the changes.

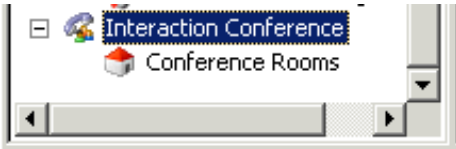
### Related Topics

- [Administration Procedures](#)
- [Installation Tasks](#)
- For more information about using these pages in Interaction Administrator, see the Interaction Administrator help topic for Security Rights.

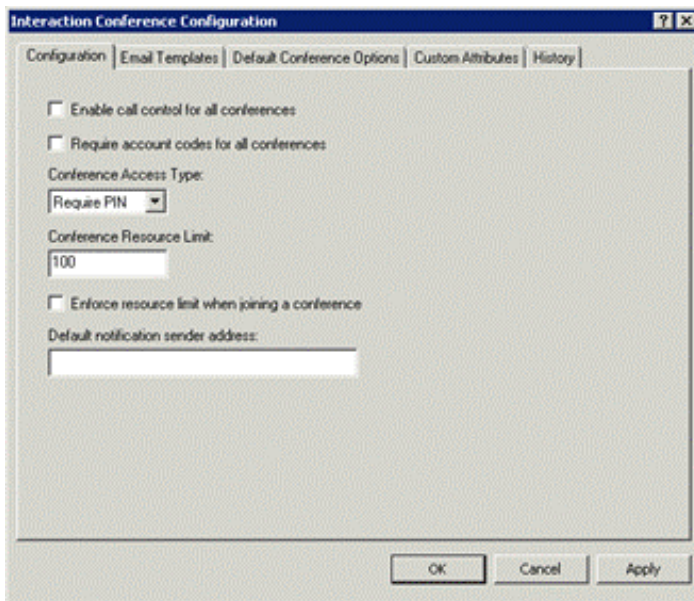
## Establish general configuration settings

This procedure explains how to use the Interaction Conference container in Interaction Administrator to configure settings that apply to all conferences. Configure these settings using the Interaction Conference Container and the Conference Rooms node. Set the relevant configuration options before using Interaction Conference. This procedure requires the [right to configure global settings](#) granted at the default user, user, role, or workgroup level.

1. Start Interaction Administrator on the CIC server.
2. Select the Interaction Conference Container.



3. Double-click the *Configuration* entry. The **Interaction Conference Configuration** dialog appears. The settings on these pages set defaults that apply to all conferences.



### Enable call control for all conferences

Select this check box to add call control options (mute, disconnect, and so on) next to names of conference attendees in the Interaction Conference web application. By default, this option is not enabled.

### Require account codes for all conferences

Select this check box to associate specific account codes (as defined in the Account Codes container) to conferences. By default, this option is not enabled.

### Conference Access Type

The settings in this drop list determine whether conference attendees are required to supply a personal identification number (PIN). You can specify PIN numbers to be required, not required, or optionally required by individual conferences. When PINs are used, Conference attendees are granted a system-generated PIN number when notification emails are sent. The options are:

- Disallow PIN— This option sets the default for all conferences not to allow PIN usage.
- PIN Optional— This option sets PIN usage as optional, meaning that conferences may or may not require them. Select this option if you want the option to use PINs on a case-by-case basis, using the web administration conference interface.
- Require PIN— (Default) This option sets PIN usage as a requirement, meaning that all conferences require a PIN by default.



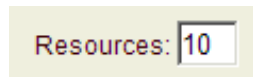
## Conference Resource Limit

This setting determines the maximum number of conference resources that Interaction Conference can use on the available Interaction Media Servers. Typically, the resources available for all CIC users to participate in ad-hoc conference calls combined with Interaction Conference calls is large and restricted only by the capacity of the Interaction Media Servers. This **Conference Resource Limit** setting specifies the maximum number of Interaction Conference users on the CIC system that can be actively using conferences at the same time. If you are unsure how to set this limit, leave this field blank.

As a rule of thumb, one conference resource is required for each conference invitee, but more conference resources are used for recording calls.

## Enforce resource limit when joining a conference

When an Interaction Conference user creates a conference, that person can optionally specify the number of conference resources to use for that conference. The default value is 10, but it can be set to any number (up to the Conference Resource Limit). Select this check box to enforce the limit set in the Resources field on the New Conference configuration page.



## Default notification sender address

If a conference host does not have a valid email address, Interaction Conference uses the **Default notification sender address** specified in this field to send notifications when a conference is created, updated, or deleted. Examples include a CIC administrator or a department manager's email address to use as a fallback for notifications.

The *Custom Attributes* and *History* tabs are common to dialog boxes in Interaction Administrator. For information about these tabs, refer to the Interaction Administrator help system.

### Related Topics

- [Administration Procedures](#)
- [Installation Tasks](#)

## Set default conference options

In Interaction Administrator, you can set default options for conferences. You can also either allow conference organizers to change the options or prevent them from doing so by using the Lock check box.

To set default conference options:

In Interaction Administrator, select the Interaction Conference container.

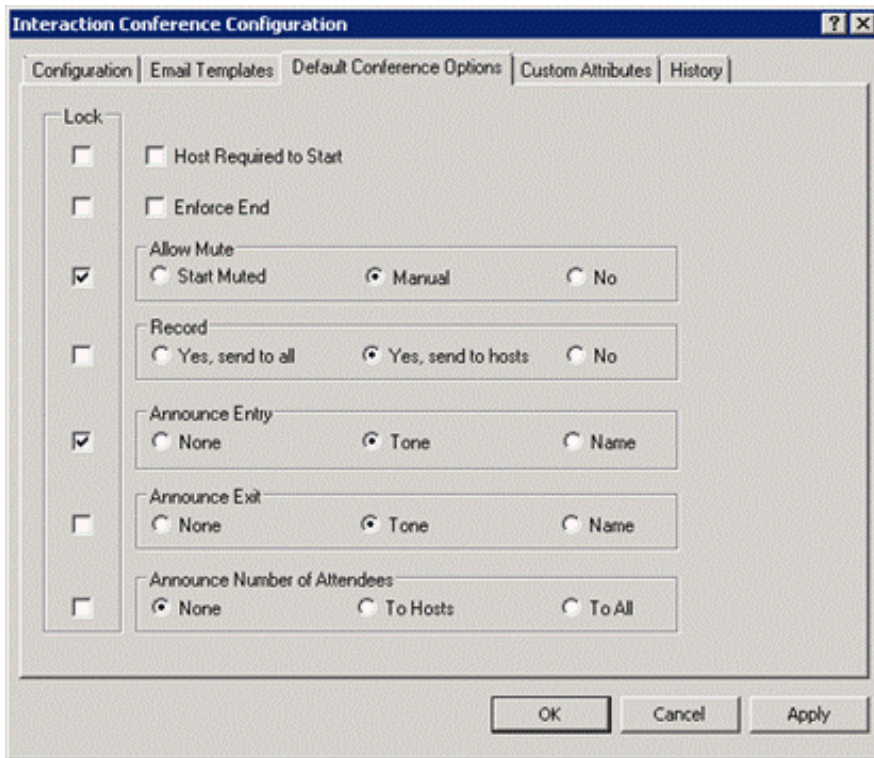


Double-click the *Configuration* entry.

The **Interaction Conference Configuration** dialog appears.

Click the **Default Conference Options** tab.

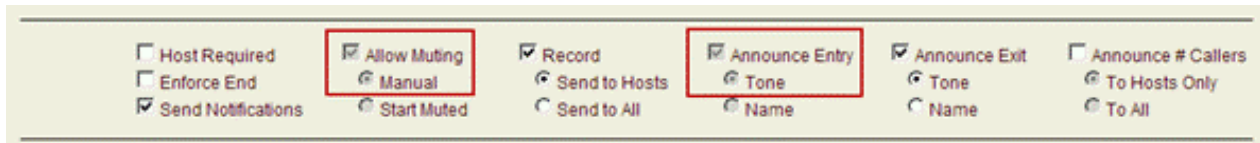
Interaction Administrator displays the tab (see figure).



Select the wanted options:

## Lock

Select the Lock check box to prevent conference organizers from changing the setting beside the Lock check box. These options appear in the selected state dimmed so the conference organizer cannot change them in the Interaction Conference Web Administrator interface, as shown



## Host Required to Start

Select this check box to delay starting a conference until a host attendee has joined.

## Enforce End

Select this check box to stop a conference call automatically at the specified ending time. If the ending is enforced, Interaction Conference automatically plays a warning message 2 minutes before the end of the conference.

## Allow Mute

Select one of the options to determine the default audio behavior for guests joining the conference and the level of control hosts have on muting.

**Start Muted** – Select this option to mute all guests by default; hosts are not muted by default. Conference guests enter the conference muted, but the conference host can unmute individual participants. Use this option if you plan to have more than 20 participants in the conference. The host can selectively unmute up to 20 participants to speak.

**Manual** – Select this option to give the host manual control over muting individual guests in the conference. In this case, hosts and guests join the conference unmuted. If there are more than 300 participants, only the first 300 to join the conference are audible. The 301<sup>st</sup> participant who is a guest (and other guests after) hear a prompt that they are joining the

conference muted. If the conference host unmutes a host or guest, and there are 300 audible participants, Interaction Conference automatically mutes an audible guest who has been unmuted the longest to stay within the 300-audible-caller limit.

Hosts (the names listed in the **Hosts:** section of the New Conference dialog in the Interaction Conference web application) automatically enter the conference unmuted, unless there are 20 Hosts already audible in the conference.

**No** – Select this option to prevent hosts from muting any guests in the conference.

## Record

Select one of the options to determine the default call recording behavior for conferences.

**Yes, send to all** – Select this option to have CIC record the conferences and send the recording to all of the hosts and guests listed on the conference.

**Yes, send to hosts** – Select this option to have CIC record the conference and send the recording to all of the hosts listed on the conference.

**No** – Select this option if you do not want to record conferences by default.

## Announce Entry

Select one of the options to determine the default announcement behavior when a guest or host joins a conference. By default, CIC plays a tone as each person joins a conference.

**None** – Select this option if you do not want any audio alert or notification when someone joins a conference.

**Tone** – (Default) Select this option if you want CIC to play a tone when someone joins a conference.

**Name** – Select this option if you want to prompt guests and hosts to say their name before joining the conference. Interaction Conference then plays that name for the rest of the conference participants to hear as they join.

## Announce Exit

Select one of the options to determine the default behavior when a guest or host exits a conference. By default, CIC plays a tone as each person exits a conference.

**None** – Select this option if you do not want any audio alert or notification when someone exits a conference.

**Tone** – (Default) Select this option if you want CIC to play a tone when someone exits a conference.

**Name** – Select this option if you want to hear the name of the guests and hosts as they exit the conference.

## Announce Number of Attendees

Select one of the options to determine the default behavior if Interaction Conference announces (by playing a prompt) the number of attendees in the conference.

**None** – (Default) Select this option if you do not want CIC to play an announcement of the number of attendees on a call.

**To Hosts** – Select this option if you want CIC to announce the number of attendees only to the hosts on the call.

**To All** – Select this option if you want CIC to announce the number of attendees to all guests and hosts on the call

5. Click **OK** to save the changes.

## Define conference rooms

When Interaction Conference components are installed on a CIC server, a new *Interaction Conference* container is added to Interaction Administrator, the primary application used to administer CIC servers. Define at least one conference room before scheduling an Interaction Conference. Additional conference rooms can be defined at any time.

To define a conference room:

1. Run Interaction Administrator from a workstation or on your CIC server.
2. Expand the **Interaction Conference** container. Then click the **Conference Rooms** container. This container lists

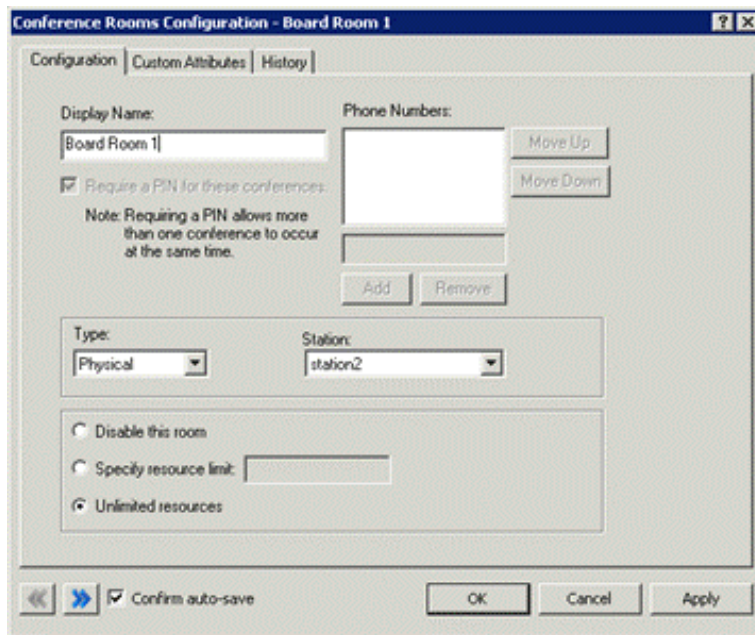
conference rooms that have been defined.

Name	Type	Display Name
Board Room 1	physical	Board Room 1
Investor Conference	virtual	Investor Conference
Meeting Room 1	physical	Meeting Room 1
Meeting Room 3	physical	Meeting Room 3
Virtual Room	virtual	Virtual Room
Weekly Sales Status	virtual	Weekly Sales Status

- To edit an existing container, double-click the name of a conference room.
- To add a conference room, click the **Add New** (Ctrl+N) icon, or right-click and then select **New...** and enter a descriptive name for the new conference room. Click **OK**.



The *Conference Rooms Configuration* property sheet appears:



3. Enter a name in the **Display Name** field. This is the name that appears in notification emails sent to attendees later, when a conference is scheduled to use this room.
4. If the General Configuration Settings allow PIN numbers to be defined, you may optionally check **Require a PIN for these conferences**. When checked, attendees must specify a personal identification number when joining a conference held in this room. Selecting this check box also allows more than one conference to occur at the same time in the room, because the PIN routes each caller to the correct conference.
5. Conference rooms can be physical (a room with a station phone on your premises) or virtual, meaning that the conference is associated with a telephone number. When you select **Physical**, the **Station** drop list is enabled. When you select **Virtual**, you can specify a telephone number. The telephone number associated with a conference room must be configured in your telephony hardware (in a gateway, for example) to route calls to the CIC server running Interaction Conference.

To add one or more phone numbers to the Phone Numbers text box, type the number in the second text box under Phone Numbers, then click **Add**. You can remove a number by selecting it in the list and clicking **Remove**. You can determine the order which phone numbers are used by moving a phone number up or down in the list by selecting it in the list and clicking **Move Up** or **Move Down**.

**Note:** The first number at the top of the list is the one that the default email notification includes. We recommend moving the number given to external invitees to the top of the list and a station extension for internal invitees after under it.

### Special Considerations for Toll-Free Numbers

Special considerations apply to the use of toll-free numbers in Interaction Conference.

- Due to the limitation of call routing in CIC, callers cannot directly reach a physical room using a toll free number. However, a physical station can call into a virtual room that is configured to be reachable by a toll free number.
  - Use toll free numbers with virtual rooms so guests can call directly to that conference room.
6. To limit the resources available for the room (by default, resources are unlimited up to the limit set in [general configuration settings](#)):
    - a. Select the **Specify Resource Limit** radio button.
    - b. In the corresponding text box, type the maximum number of resources to allow.
  7. If necessary, you can select the **Disable this room** option to prevent the conference room from appearing in the list of available rooms, but without deleting the configuration.
  8. Click **OK** to save changes.

The *Custom Attributes* and *History* tabs are common to property pages in Interaction Administrator. For information about these tabs, refer to the Interaction Administrator help system.

### Related Topics

- [Administration Procedures](#)
- [Installation Tasks](#)

## Configuring Interaction Conference Phone Numbers and Stations

If you are using an Interaction Conference virtual room, CIC identifies Interaction Conference calls based on the phone numbers defined in the **Phone Numbers** list on the **Conference Room Configuration** page.

Conference calls that include external (non-CIC users) and internal (CIC user) invitees require two phone numbers, one for each group. The internal invitees call a local station extension, and external guests call the full phone number. Configure the station to map to the external number.

Conference Rooms Configuration - Virtual Room

Configuration | Custom Attributes | History

Display Name: Virtual Room

Phone Numbers: 317-555-6000, 6000

Require a PIN for these conferences.  
Note: Requiring a PIN allows more than one conference to occur at the same time.

Type: Virtual

Station:

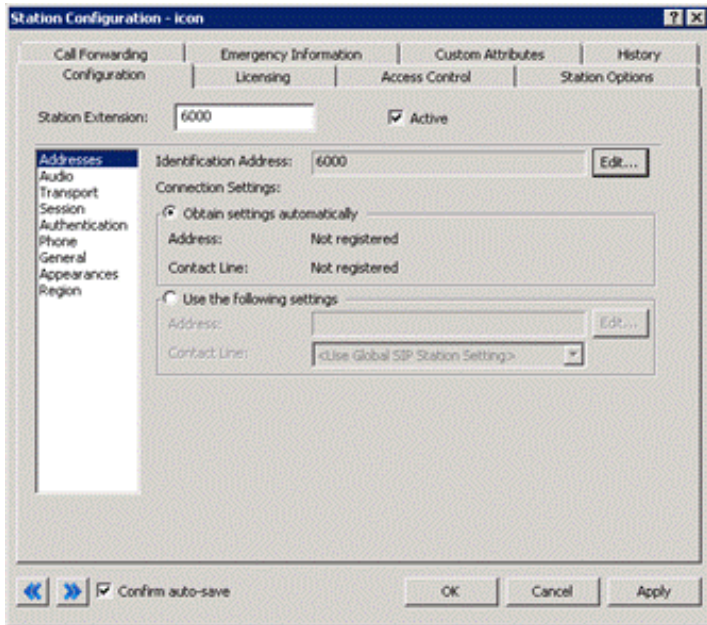
Disable this room  
 Specify resource limit:   
 Unlimited resources

OK Cancel Apply

**Note:** The first number at the top of the list is the one that the default email notification includes. We recommend moving the number given to external invitees to the top of the list and a station extension for internal invitees after under it.

## Interaction Conference Stations

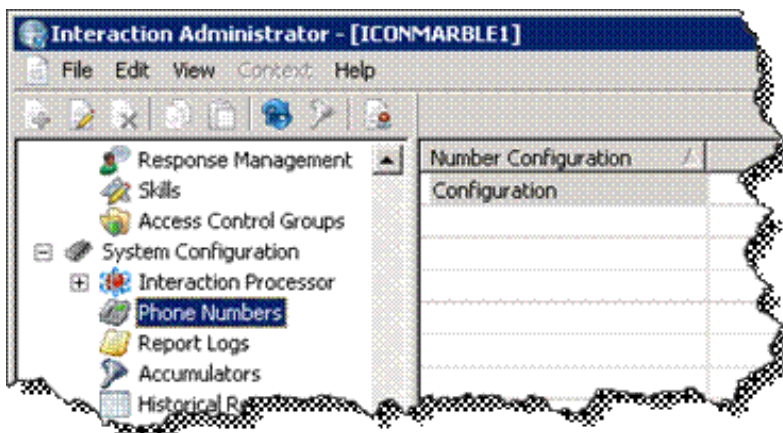
If calls to Interaction Conference originate from the CIC server (for example, internal calls by CIC users), then create a stand-alone station for an Interaction Conference virtual room with the same extension as one of the phone numbers for the room. **Without this relationship, calls loop out and back into the system using unnecessary resources (tromboning calls).** The station requires the Basic Station license.



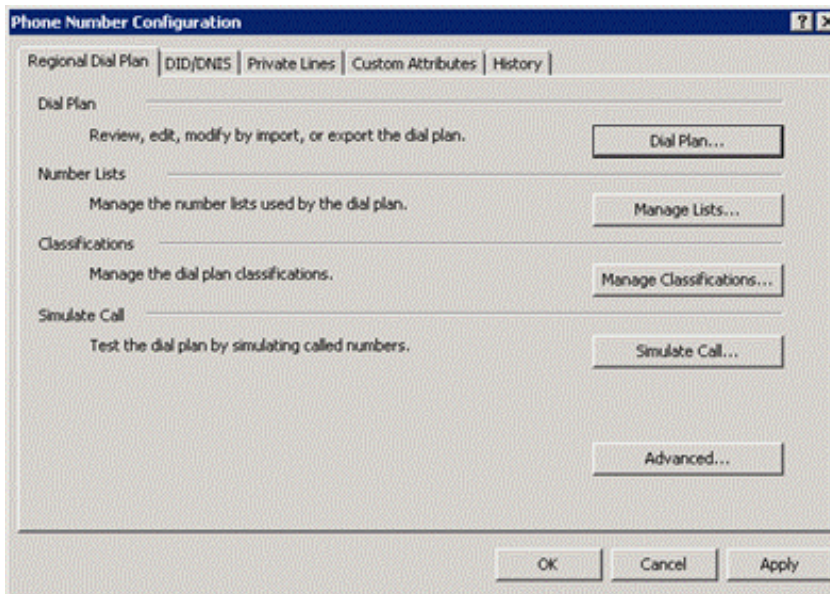
To configure Interaction Conference external and station number pairs:

Use dial plan entries to resolve external or internal phone numbers to the Interaction Conference room phone number. This configuration is useful when matching groups of numbers for a single conference.

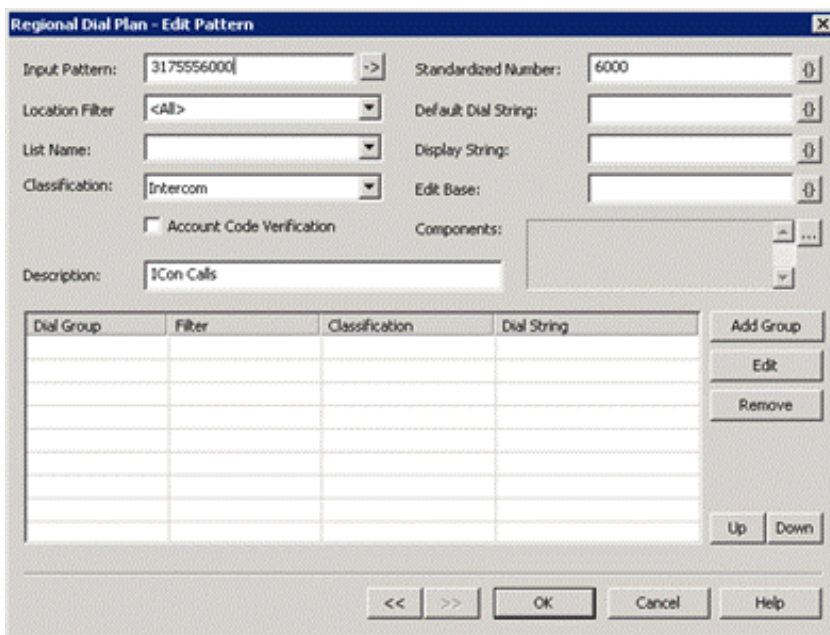
1. In Interaction Administrator, select the Phone Numbers container and then double-click the Configuration entry.



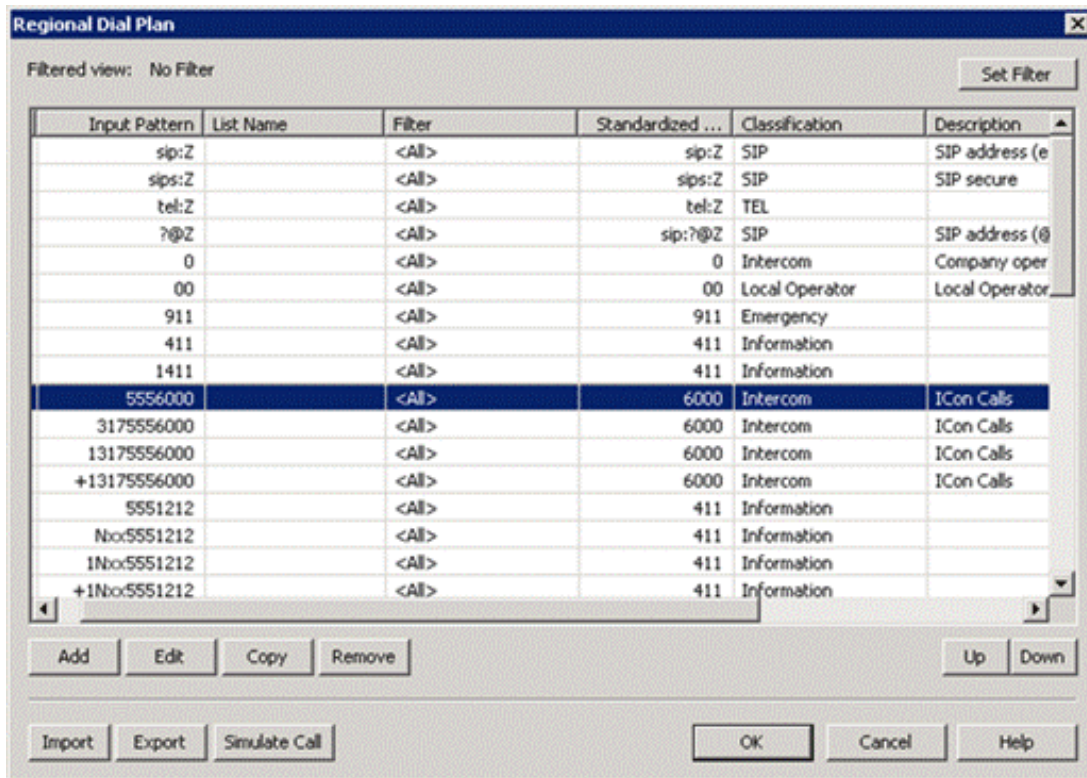
2. On the Regional Dial Plan page, click the Dial Plan... button.



- On the **Regional Dial Plan** page, click **Add** to add a phone number for a conference room. If an existing number exists, double-click that entry to edit it. Enter the external number as the **Input Pattern** and the internal station number as the **Standardized Number**. In the **Classification** drop list, select **Intercom**.



- Create an entry for each variation of the external number, or use an **Input Pattern** that precisely represents all variations of the conference room phone number that maps to the same station number.



## Define Email Templates

Interaction Conference allows the administrator to define email templates for meeting invitations and cancellations. Features include:

- The ability to create separate templates for invitations, updates, and cancellations.
- The ability to create separate templates (of all three types) for use by hosts and guests.

### To create an email template:

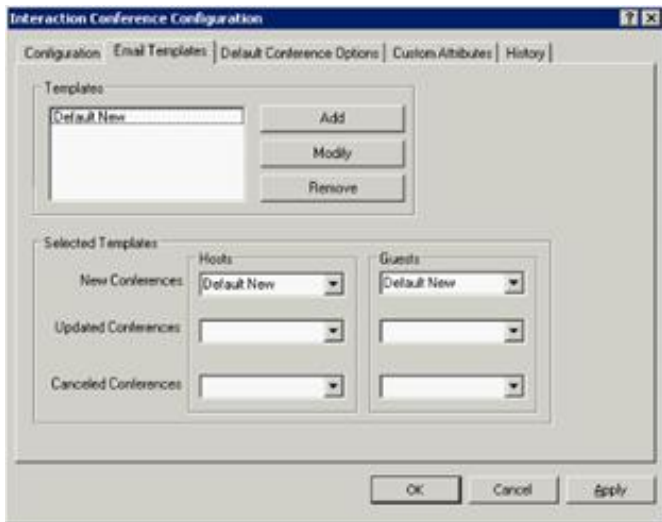
1. In Interaction Administrator, scroll to the Interaction Conference container and double-click **Configuration**.

Interaction Administrator displays the Interaction Conference Configuration dialog.

2. Click the **Email Templates** tab.

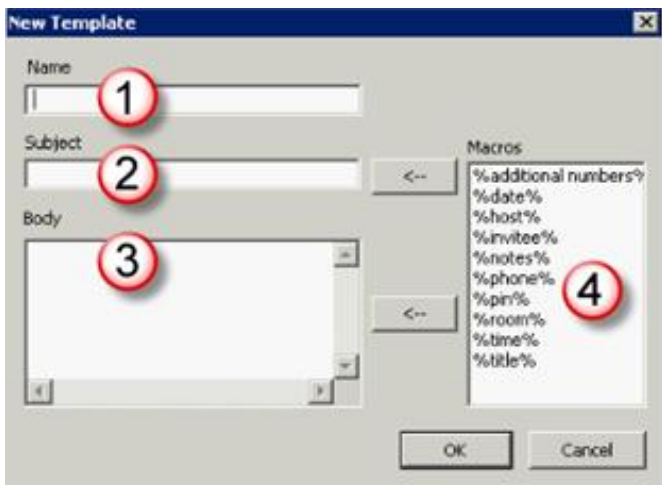
Interaction Administrator displays the Email Templates tab.





3. Click Add.

Interaction Administrator displays the New Template dialog.



4. Design the template:

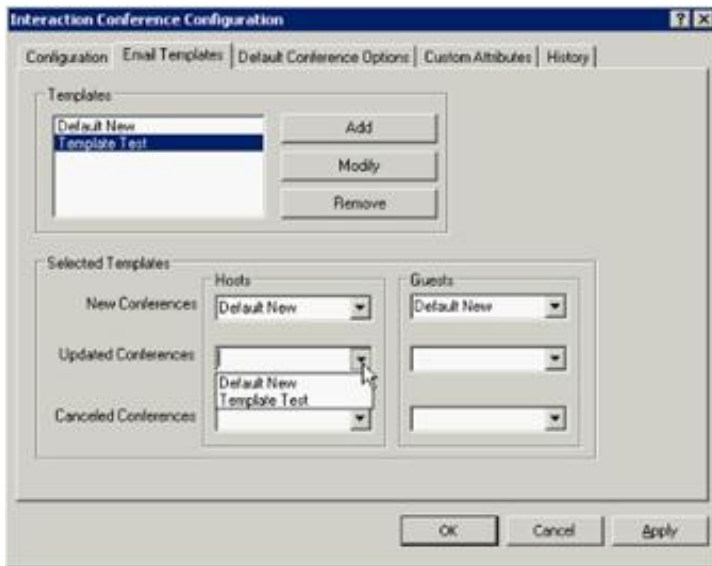
- a. In the **Name** text box (1), type a name for the template.
- b. In the **Subject** text box (2), type a default subject for the email message (for example, "Meeting invitation").
- c. In the **Body** text box (3), type the default text of the email message, inserting macros (4) as needed:

- **Additional numbers:** Phone numbers, other than the main conference number, on which attendees can call into the conference.
- **Date:** The date of the conference.
- **Host:** The host of the conference.
- **Invitee:** The name of the invitee (the recipient of the email message).
- **Invitees:** The names of the invitees (the recipients of the email message).
- **Notes:** Any explanatory notes about the conference.
- **Phone:** The main (or only) phone number that attendees use to call into the conference.
- **PIN:** The PIN number attendees use to gain access to the conference.
- **Room:** The room identifier for the conference.
- **Time:** The time at which the conference is scheduled.
- **Title:** The title of the conference.

d. Click OK.

Interaction Administrator creates the template and lists it on the Email Templates tab of the Interaction Conference Configuration dialog.

- In the Selected Templates area, use the list boxes to assign the template to a message type.



## Change the default time for unused conferences

Interaction Conference purges open conferences that have not had calls for the previous 365 days. To change the default number of days, use the Windows Run menu choice to start *DSEditu*, then change the value in this DS key: [Production | Interaction Conference | Open Conference Inactivity Days](#).

## Change the default to display only my conferences in the Conference List page

In the Conference List page, a user can select the Display only my conferences check box at the top of the conference list to display only their conferences. By default the Display only my conferences check box is not selected so that all conferences appear in the list. You can change the default of the Display only my conferences check box so that only the conferences of the user appear in the list. To change the default, change the value of the `<DefaultDisplayOnlyMyConferences>` element from false to true in the configuration.xml.

Example:

```
<?xml version="1.0" encoding="UTF-8"?>
- <Config>
  - <Servers>
    - <Server>
      <Host>localhost</Host>
      <DisplayName>Default Server</DisplayName>
    </Server>
  </Servers>
  <AutoSelectServer>false</AutoSelectServer>
  <DefaultDisplayOnlyMyConferences>false</DefaultDisplayOnlyMyConferences>
  <NetTcpAddress>net.tcp://localhost:4502/interactionconference/</NetTcpAddress>
</Config>
```

# Change Log

Change Log Date	Changes Made
05-December-2012	Updated for Interaction Conference 4.0: Outlook 2010 plug-in support, announce number of attendees, iCalendar attachments, migration to Interaction Conference 4.0.
08-February-2013	Updated screen images and instructions for Interaction Administrator, updated installation instructions, updated instructions for editing the Configuration.xml file, change Conference Resource Limits, and Enforce Resource Limits configuration descriptions, and added instructions for configuring stations and phone numbers to join internal and external callers in the same virtual room.
20-February-2013	Applied edits, cleaned up text, clarified configuration options, and added a note about the requirement to complete the initial run of CIC Setup Assistant before running the Interaction Conference plug-ins install on the IC server.
28-August-2015	Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to Interactive Intelligence Product Information site URLs, and copyright and trademark information.
11-April-2016	Updated copyright and trademark information. Updated 20 participant limit to 300 for audible conference participants for ICONF-827. Updated to include support for Microsoft Outlook 2013.
19-May-2016	Updates for ICONF-853.
26-April-2017	Updated Microsoft Outlook requirement section in the Install Interaction Conference Outlook Plugin topic to indicate 64-bit versions not supported. Updated copyright and trademark information.
03-October-2017	Updated license requirements to explain if the features license is not present, Interaction Conference server does not start. As a result a user cannot schedule a conference from Interaction Conference Web Server or Outlook. Also, attendees cannot connect to a conference room.  Updated Requirements to include Windows Server 2016.
24-October-2017	Rebranding terminology, screen captures, copyright.
26-June-2018	Updated requirements to include Microsoft Outlook 2016. Miscellaneous corrections.
31-July-2018	Updated Restrict rights to use conference room topic to include note about inheriting restriction from role or workgroup.
26-February-2019	Updated Configuring Interaction Conference Phone Numbers and Stations topic to indicate the Basic Station license is needed in terms of licensing for Interaction Conference Stations.
07-March-2019	Change log modified to include correct date format.
12-July-2019	Updated Install Interaction Conference Web Server and Installation Tasks topics to include link to download page for WebServer msi.
24-September-2019	Added "Change the default to display only my conferences in the Conference List page" topic under Administration Procedures.
04-March-2020	Updated requirements to include Windows Server 2019.
27-April-2020	Updated links from my.inin.com to new locations.