Getting Started with TrueConf

For Windows, macOS and Linux users

To make the most of your application, connection to TrueConf Server 5.5.0+ is required.

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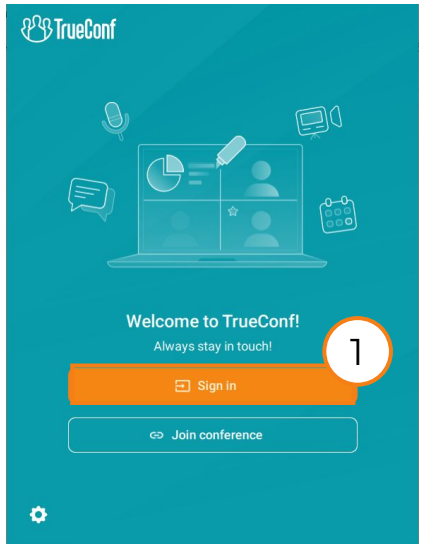
First steps

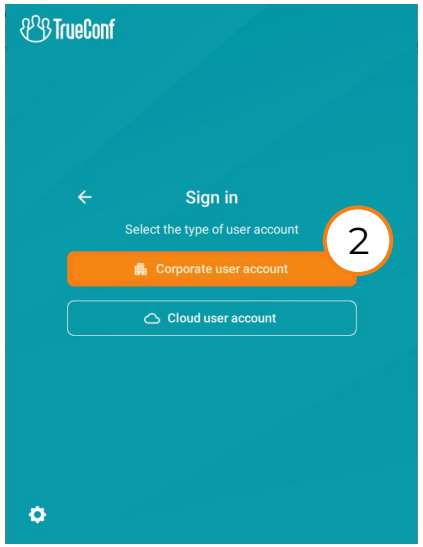
Sign in

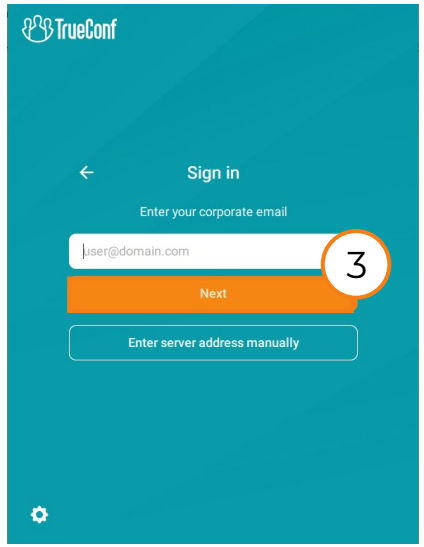
The application supports three authentication methods depending on server settings:

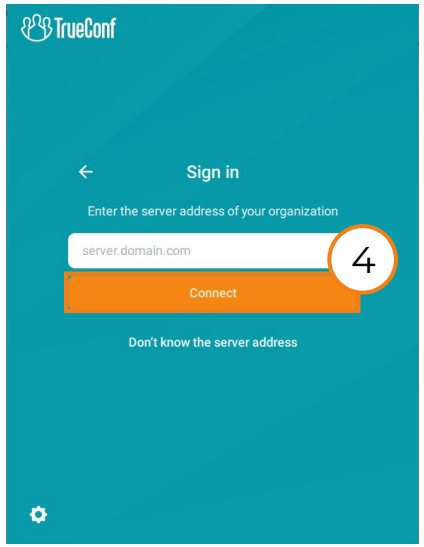
- Single Sign-On (SSO)
- Two-factor authentication providers (AD FS, Keycloak etc.)
- Corporate email
- Username and password.

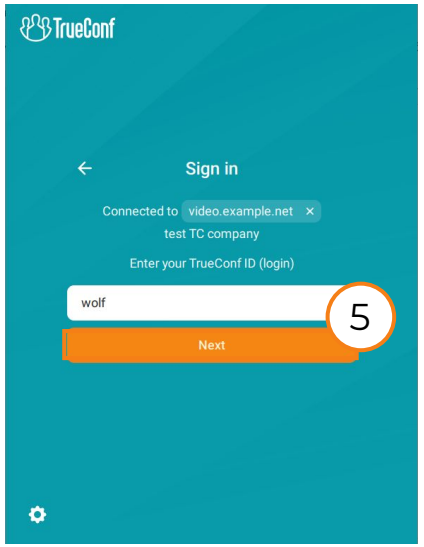
When using SSO, all you need is to authenticate within the system. Login and password authentication is described below, and **AD FS** authentication is described on the corresponding slide.

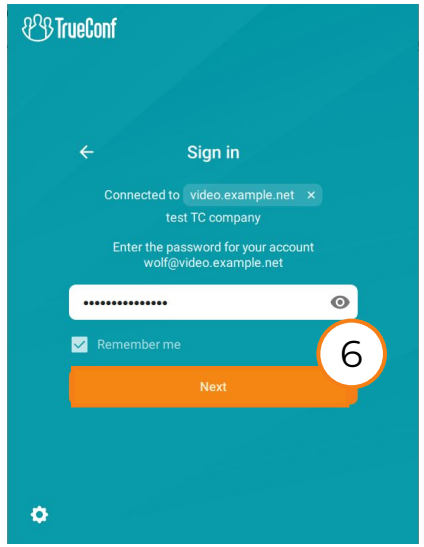












1. Start the app and click the **Sign in** button.
2. Click the button **Corporate user account**.
3. Click the button **Enter server address manually** (if you know this address) or specify your corporate email and click **Next.**
4. If you choose to enter the server address, enter it and click **Connect**.
5. Enter your **TrueConf ID** and click **Next**.
6. Enter your **password** and click **Next**.

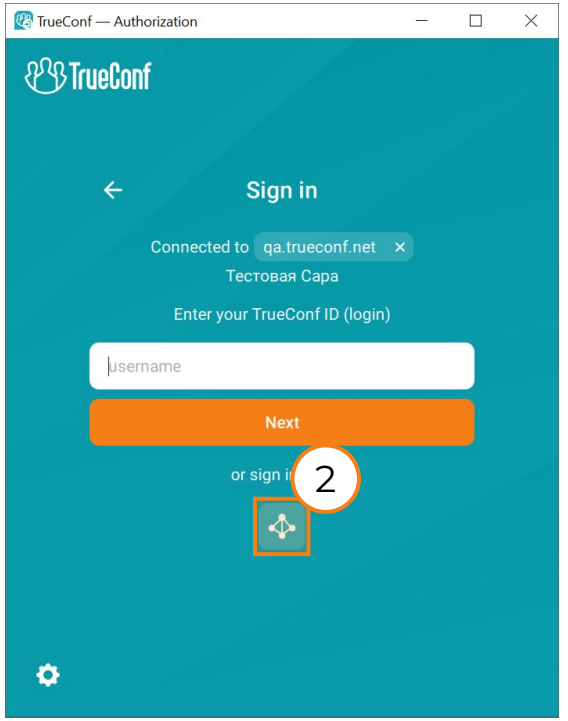
Two-factor authentication

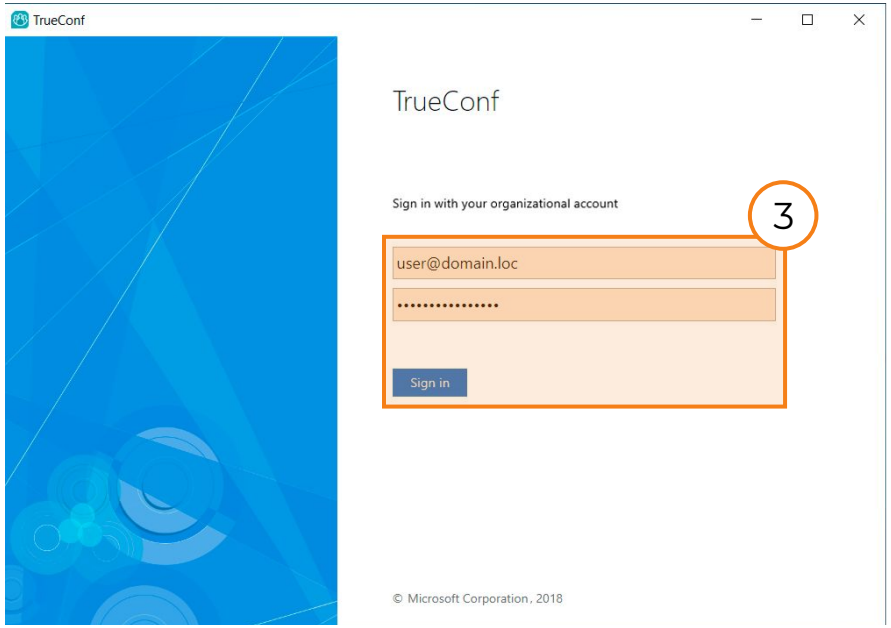
! This authentication method will be available only if your TrueConf Server supports it.

1. Follow steps 1–4 from the **Sign in** slide.

2. On the server side, the administrator can also allow users to choose the type of authentication: with the login and password or two-factor authentication. In this case by clicking the **Connect** button, you will open the form for entering the login. This form will also include the authentication button

3. You will open the pop-up window with the selected authentication provider (e.g., AD FS). Enter your TrueConf ID and password in the corresponding fields and click **Sign in**.

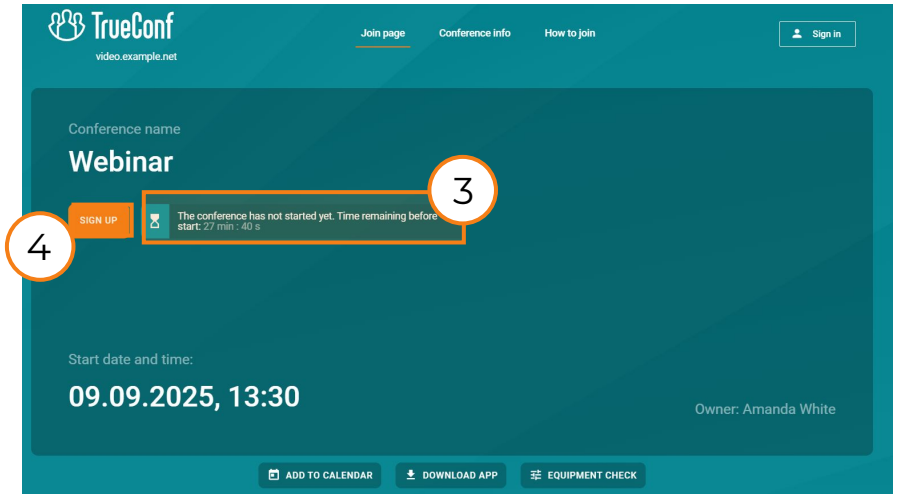


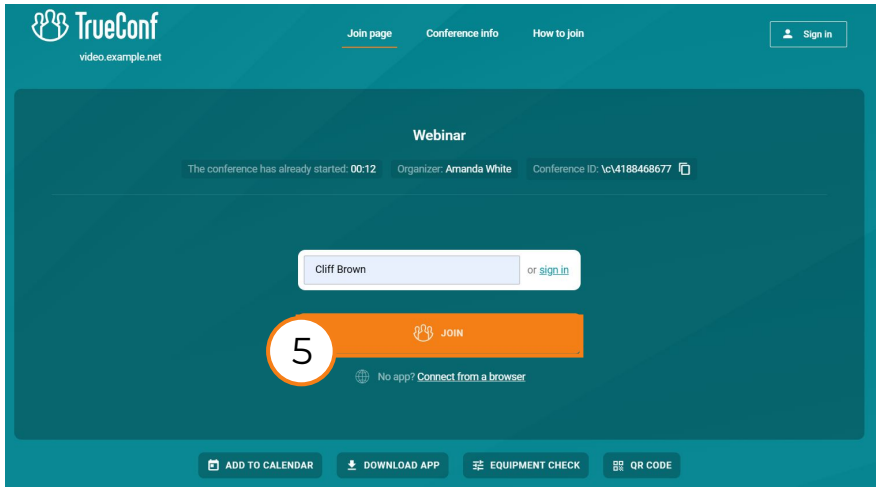


How to join a webinar as a guest

Even if you do not have an account on TrueConf Server, you can be invited to a webinar (public conference) as a guest. In this case you can use a browser, but we recommend joining the event from our client application.

1. Install our application from this page.
2. Follow the conference page link sent to you.
3. If you see a countdown timer, the event has not started yet, Just visit this page later. You can add this event to your calendar so you don't miss it.
4. If you see the **Sign up** button, click it and fill out the registration form. The direct link for joining the event will be sent to the specified email.
5. In case you see the buttons for joining the webinar on the page, enter your first and last name and click **Join.**

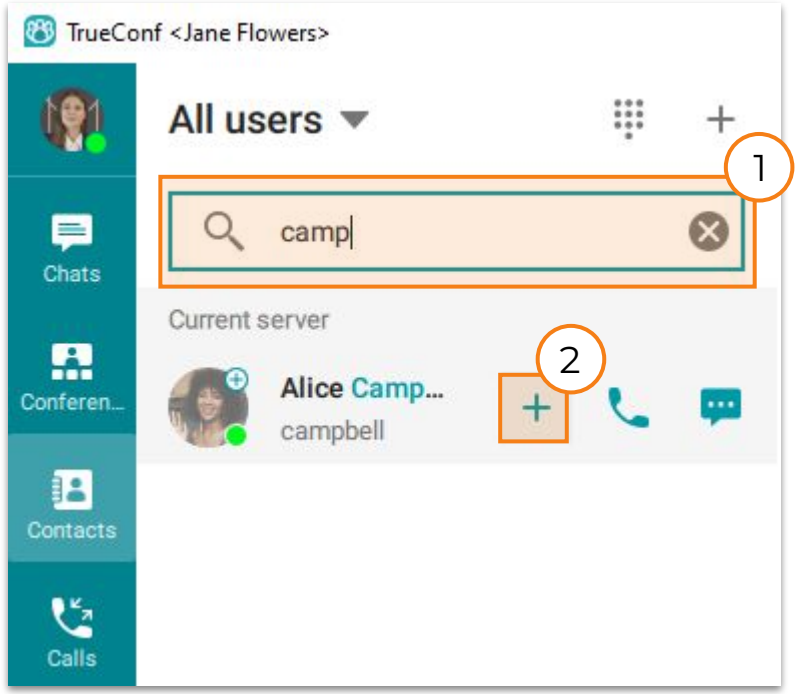




How to find and add contacts to your address book

To open your address book, click in the application menu.

When you start the application for the first time, your address book may be empty.



1. To find a contact, enter a user's name in the search field.
   A list of matching contacts will be displayed below.

2. If you want to add a contact to your address book, move the mouse over the user's name and click + .

! Your address book can be pre-filled by your TrueConf Server administrator. In this case you can also add contacts manually.

After filling out the address book, you will see the list of all added contacts and their statuses:

- – online
- - online from a smartphone or tablet
- - online from a hardware or software SIP/H.323 endpoint
- - participates in a conference as its owner
- - busy (in a video call or conference)

- – away (automatically set after some period of inactivity, the default value is 15 minutes)
- – recently active: the network status for users who previously signed in to the mobile application, but are currently offline
- – do not disturb (can be set manually in the profile)
- – offline

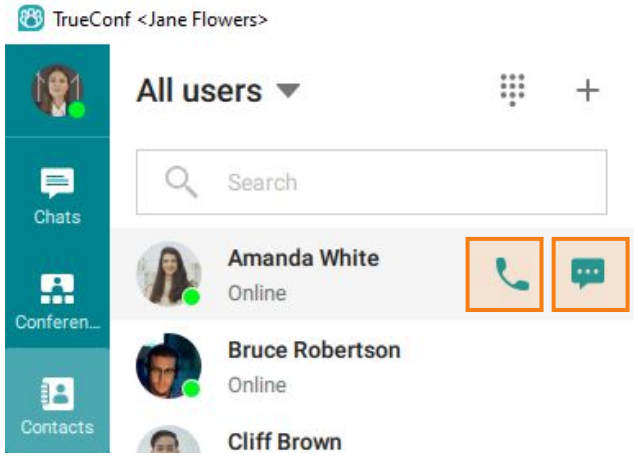
Actions on address book contacts

To call a user:

- hover the mouse pointer over a user's name and click the call button
- or double-click the user's name.

To send a message, hover the mouse over the user's name and click the chat icon

You can also view information about a user, block or delete a user (if you added the user manually). To do it, right-click and select the corresponding option.

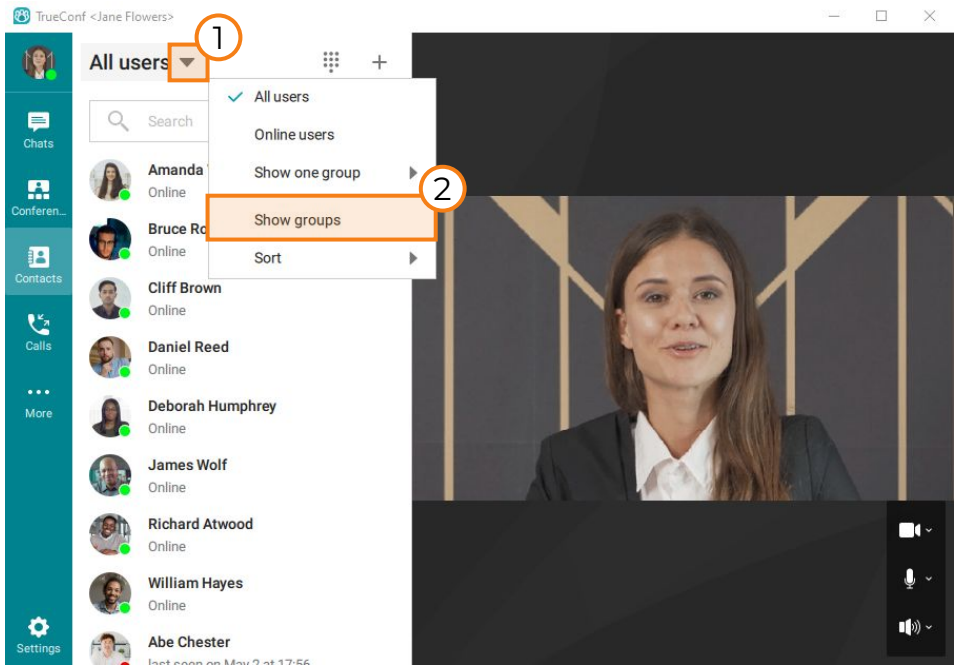


If the contact is not available (the status is different from "online"), you can use the option **Notify when user goes online**. As a result, you will receive the notification when this user goes online.

User groups

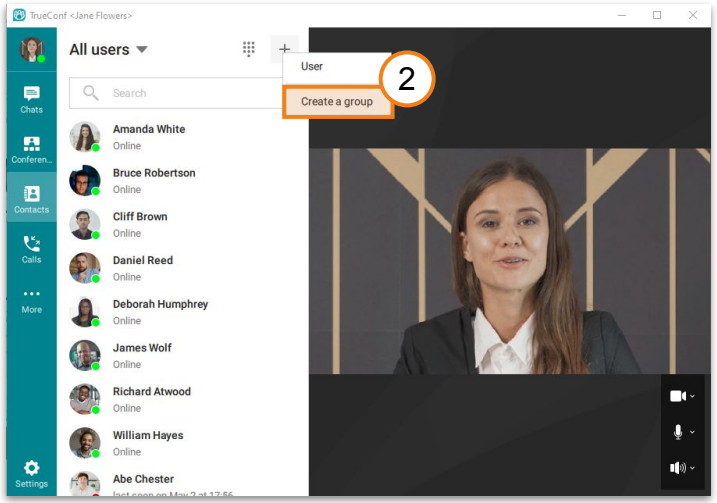
By default, your address book displays the list of all users (i.e. user groups are not displayed). To enable the display of user groups:

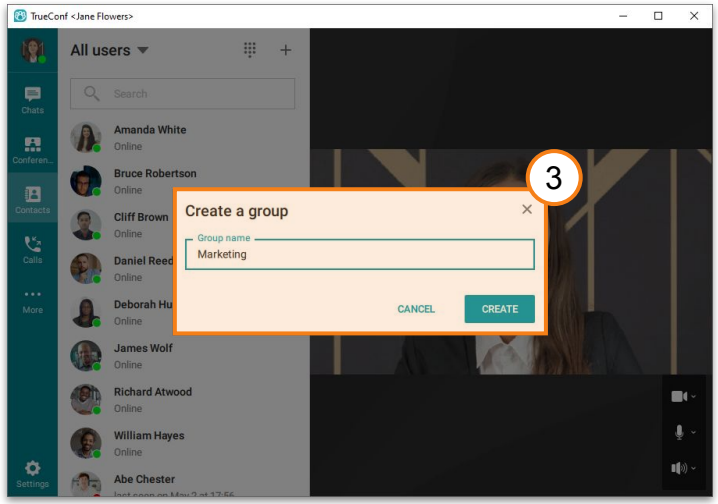
1. Click the arrow above the search field.
2. Select **Show groups**.



To create a new user group:

1. Click + button at the top right corner of the address book.
2. Select **Create a group** in the context menu.
3. Enter a name for the new group and click **Create**.





4. After creating a user group, you can:
   - invite all group users to a conference
   - add users to the group
   - rename the group
   - delete it.

   To do it, right-click on the group name and select the corresponding option.

Chats

To open the list of your conversations, click in the application menu.

Apart from texting and exchanging files, in a chat you can also:

1. Search for messages

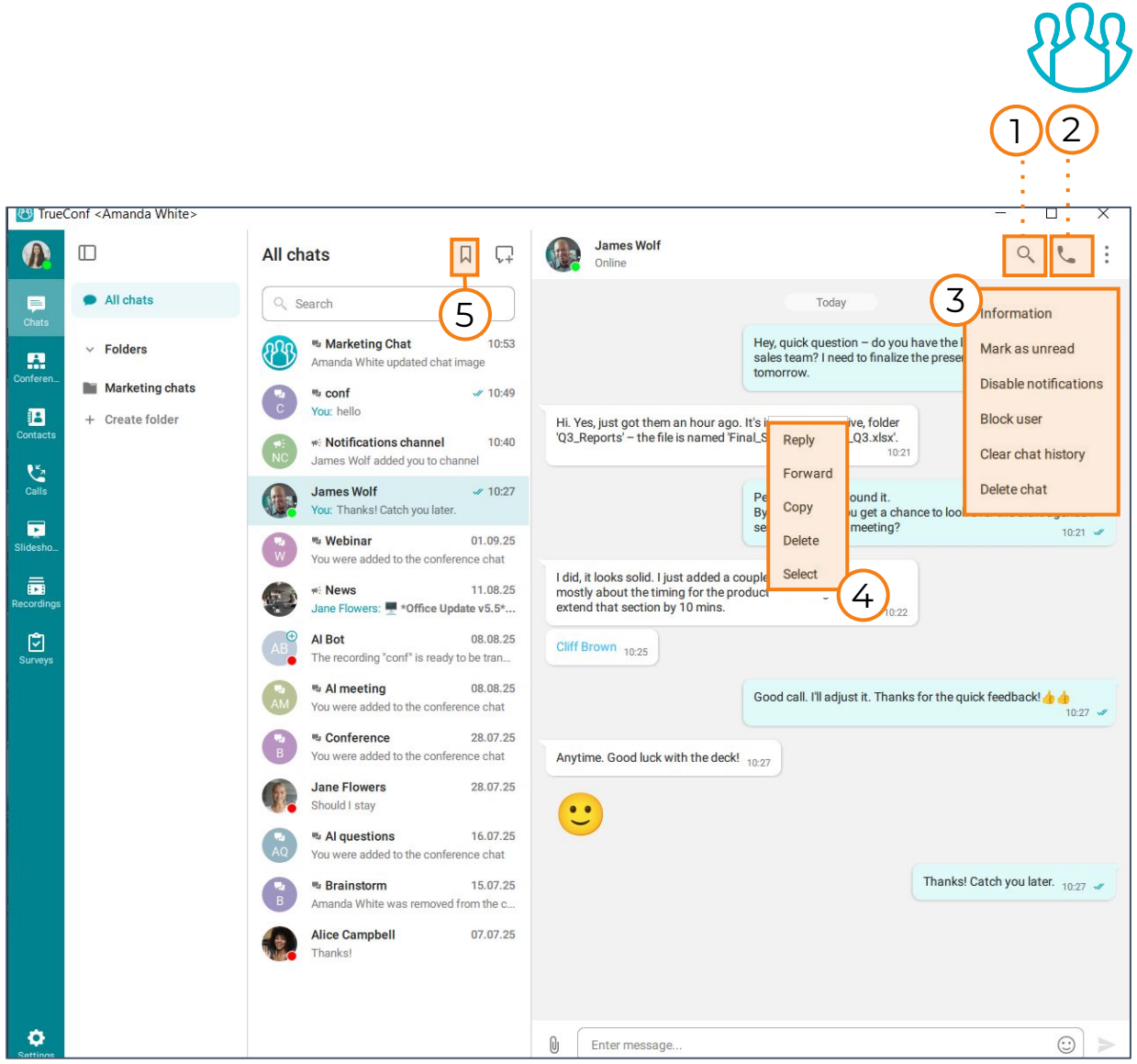
   To do it, click and enter your query in the search field. As you type, the matching results will be highlighted.

2. Call a user.

3. Tap for more options:
   - view information about a contact or group chat
   - mark a chat as read or unread
   - mute chat notifications
   - block a contact
   - clear the chat history
   - delete a chat.

4. Right-click a message to:
   - reply to it
   - edit
   - forward it to another user
   - copy
   - delete
   - select (for example, select multiple messages and delete, copy or forward them all at once).

5. Use the **Favorites** chat to save messages and files from other chats. To open it, click the button



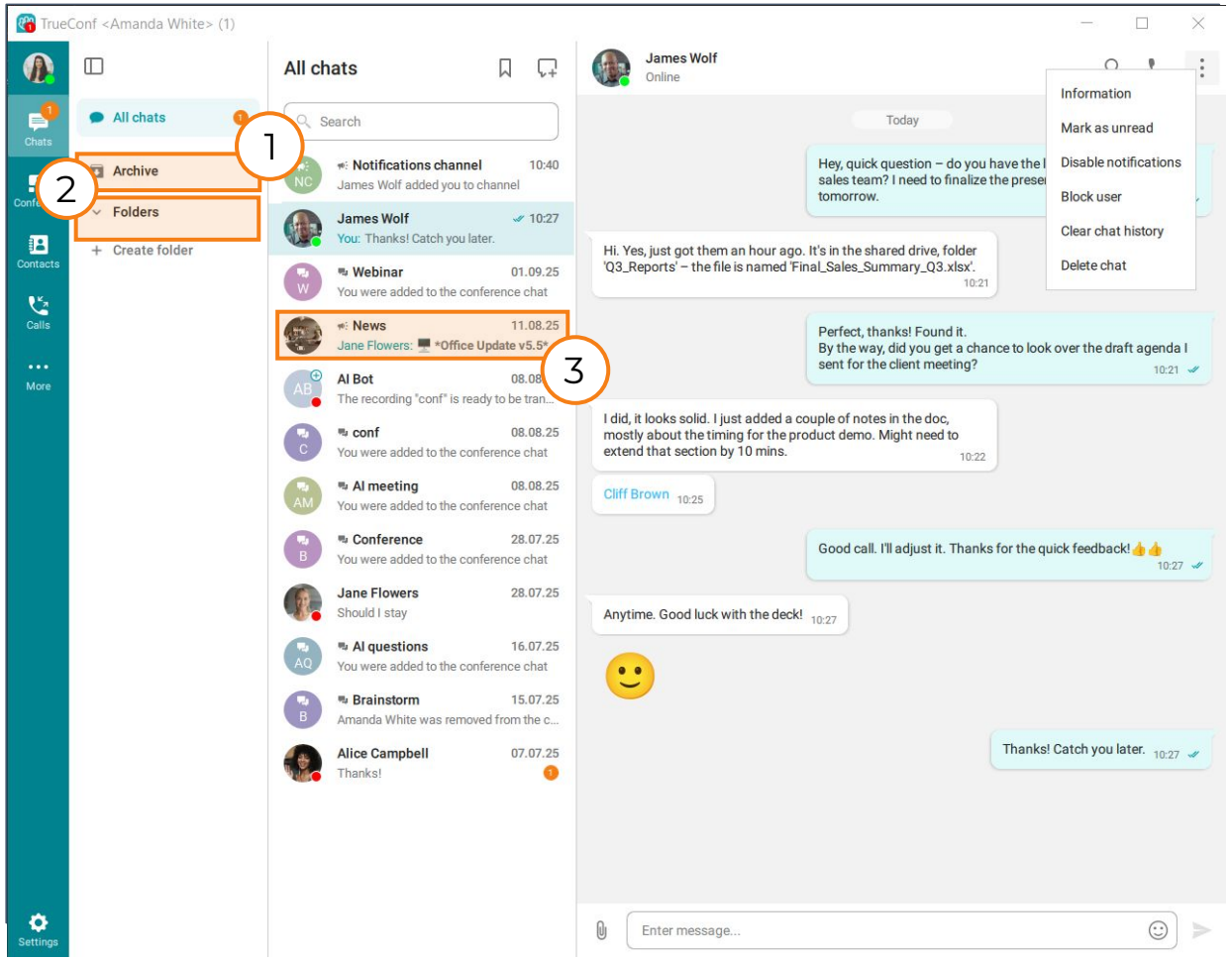
Chat folders, archive, channels

1. The archive is a system folder that cannot be deleted or renamed. You can move your private or group chats here to better organize the main list of your chats.

2. Chat folders enable you to structure your chats or group them in a certain way. By right-clicking on the folder, you will open the context menu with the following options:
   - Configure the settings of this folder
   - Delete the folder.

! **Archive** and **All chats** are the system folders that cannot be deleted or renamed.

3. A channel is a group chat in which only the group chat owner and moderators can send messages. It can be used to notify users about news and updates. It is marked with this icon



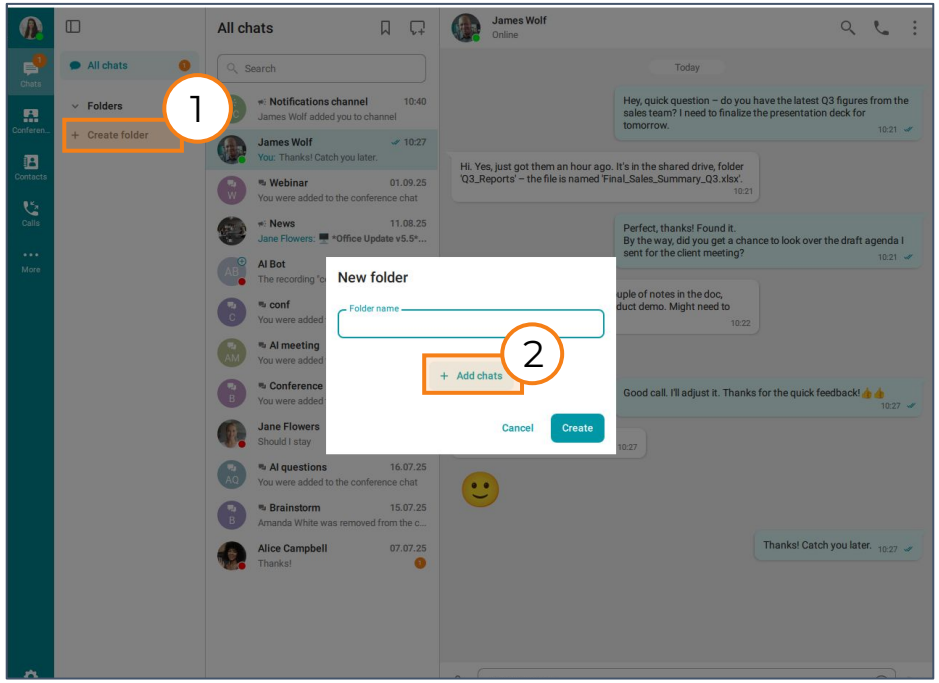
Creating a folder for chats and channels

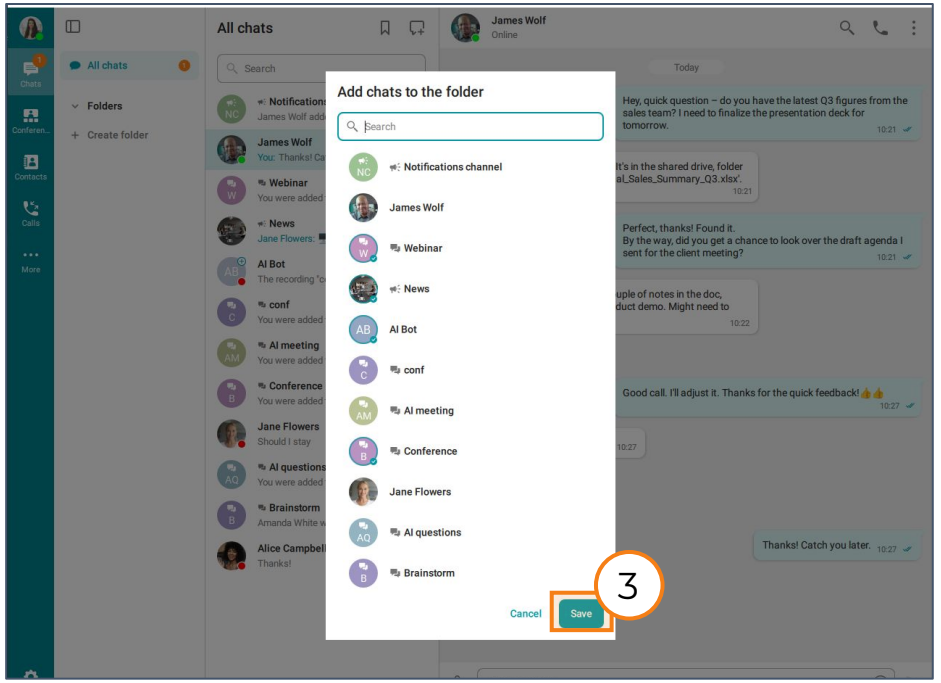
1 To add a folder, click **+ Create folder** in the side panel. Fill out the **Folder name** field in the **New folder** pop-up..

! To create a folder, you need to add at least one chat or channel to the folder. It is impossible to create an empty folder.

2 By clicking on the **+Add chats** button, you will open the pop-up window where one can choose chats.

3 Select chats and channels that will be added to the folder, click **Save** and **Create.**

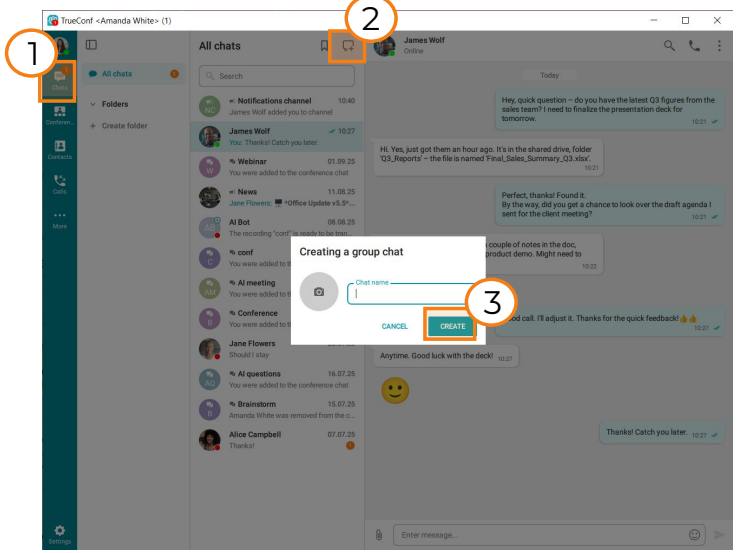




Group chats

To create a group chat:

1. Click in the application menu to open your chats.
2. Click and enter the chat name. Here you can also upload a chat avatar by clicking on the icon to the left of the chat name.
3. Click **Create**. Select the users from your address book and add them to your chat.

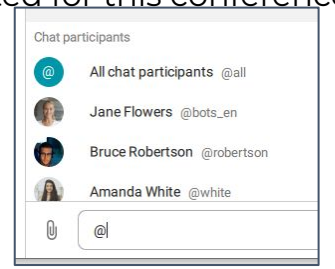


Group chat features

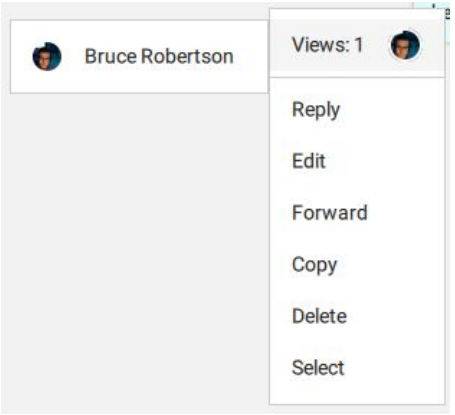
For all participants

Start the conference – go to the selected chat and click the button in the upper right corner of the application. The selected chat will turn into the chat of the created conference. However, it is possible to remove this binding which means that a new chat can be created for this conference.

To mention a user, enter the character **@** to display the list of users. You can find a participant by login (TrueConf ID) or name, e.g., **@robertson**. To mention all participants of the group chat, type **@all**.



In a group chat, you can check which of the participants have read your message. To do it, right-click on a message.



For the owner and moderators

Appoint chat moderators – go to a chat and click the button To give moderator rights to a participant, right-click on this person and select the option **Appoint as moderator** in the context menu. A moderator can add/remove participants, appoint new moderators, delete chat messages, and change the chat name or its avatar.

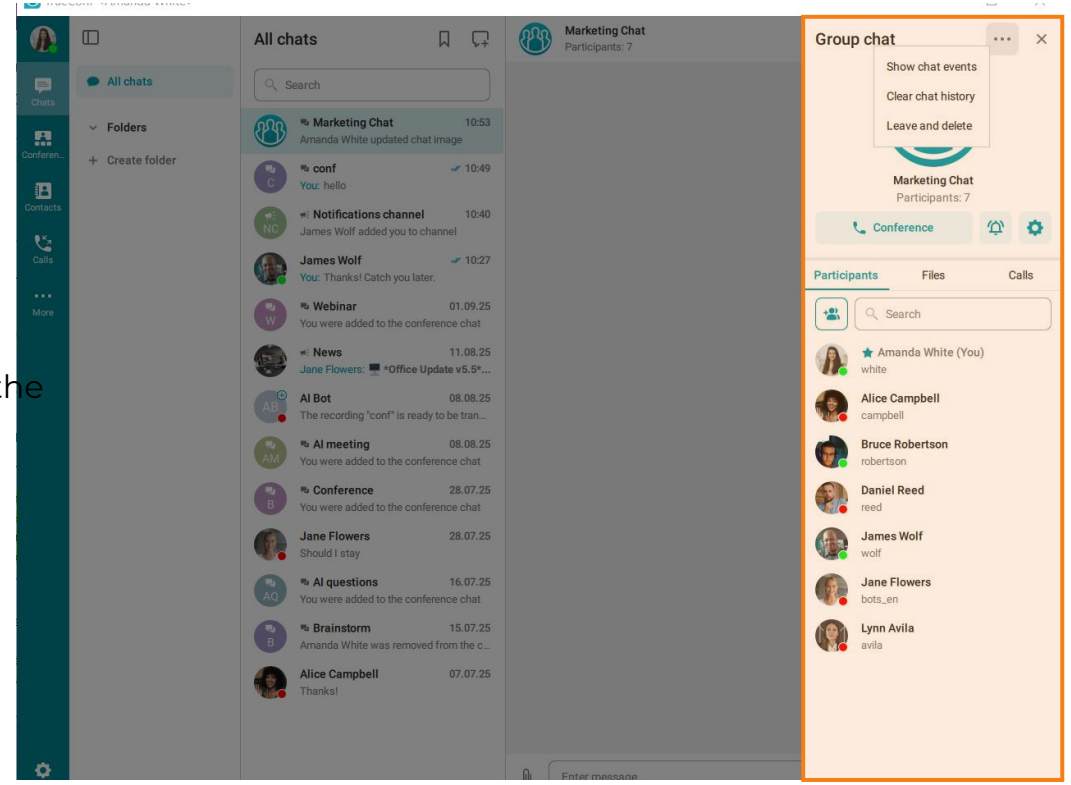
Add or remove a participant: select a chat in the list of chats and click the button in the upper right corner of the application.

! Only the owner can delete the chat for all participants.

Chat settings

If you are the owner or moderator of a chat, you can change some of its settings. To do it:

Right-click on the chat and select **Group chat info** in the context menu.



On the chat info panel you can:

- set the chat avatar
- change its name by clicking on
- mute chat notifications by clicking on
- configure the display of chat events (a participant is added or removed, the chat avatar/name is changed) by clicking on
- allow the display of chat history for new participants (if this box is unchecked, these users will not see the messages sent before they were added to the chat)
- add new participants to the chat by clicking on

You can also view lists of chat participants and sent files at this panel.

! A virtual room and a scheduled repeating meeting will use the same group chat synchronised with its conference.

Creating surveys

You can create surveys and send link to these surveys to your co-workers.
To do it, take these steps:

1. Go to the list of your surveys by clicking on the Surveys button in the application menu.

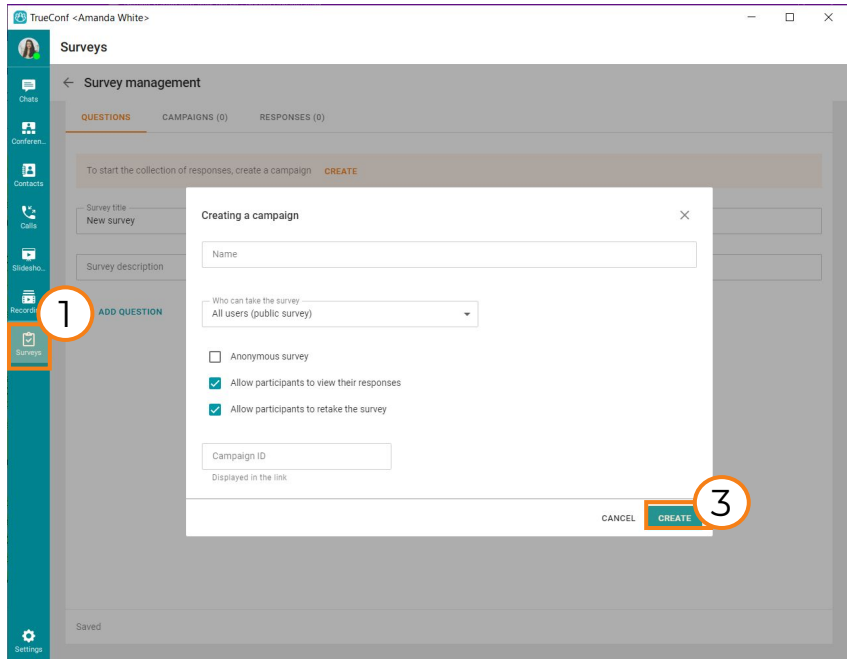
2. Click on **+Create survey**. A survey campaign is needed for creating a survey. So, you need to click **Create** in the corresponding notification.

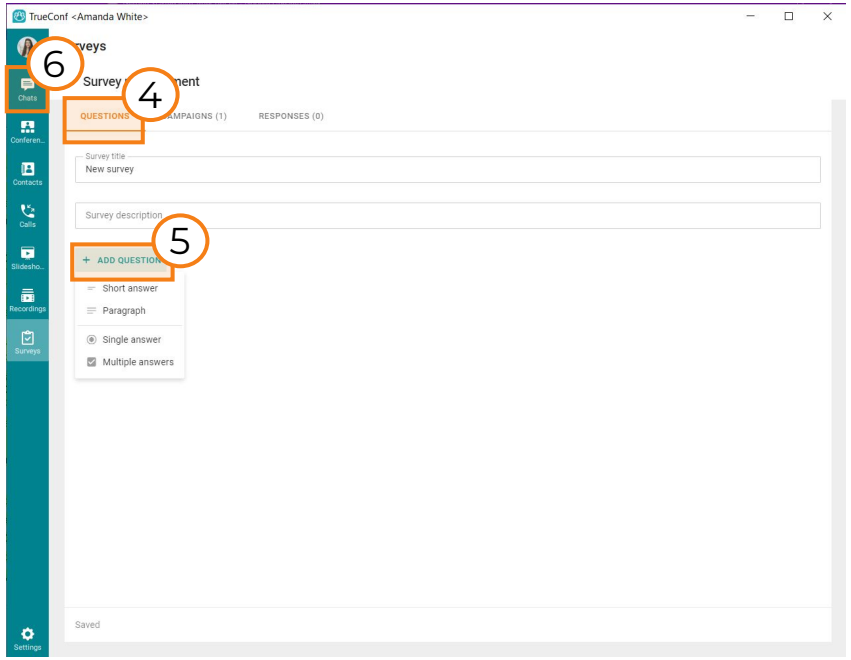
3. Fill out all required fields in the pop-up **Creating a campaign** and then click **Create**.

4. The campaign you have created will be displayed in the list. Next, to create a survey, you need to open the **Questions** tab.

5. Enter the name and description of the survey in the corresponding fields. Click **+Add question** and select the type of question in the corresponding field.

6. The survey parameters are saved automatically, the **Saved** notification will be displayed in the bottom left corner. When a survey is edited, the **Saving...** notification will be displayed. When you have added all the questions, go to **Chats** to use the survey.





!

The survey you have created can be quickly sent to a group chat. To do it, click on to send the survey as an attachment and select the option **Send survey.** In the pop-up **Creating a campaign**, set the survey parameters and then click **Create and send**.

Creating a conference

You can create a quick conference with a minimum of settings, and this meeting will start immediately. It is also possible to schedule a conference or create a virtual room (a conference without a schedule).

! Quick conference can only be private, i.e. without guest connections.

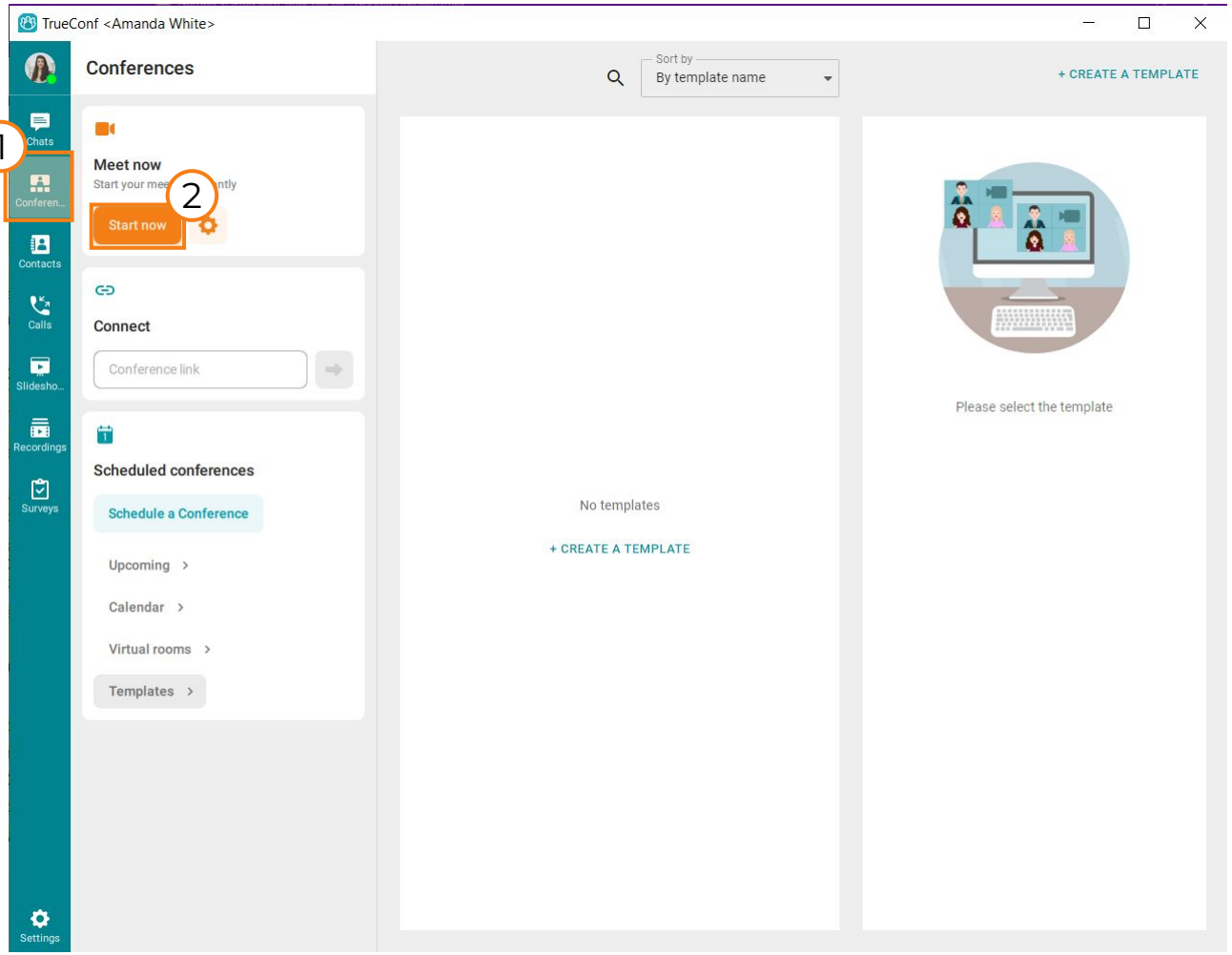
Every TrueConf conference can be held in four modes:

	Description	Who can be on screen (podium)
Smart meeting	Participants can see and hear only the speakers or those who share content. Maximum number of speakers on podium is set when a conference is created.	Every participant who speaks or shares content. Moderator can pin any participant in the conference layout.
Role-based	All participants can see and hear only the speakers on the podium. The maximum number of speakers is set when creating the conference. When this number is reached, no one else can go to the podium, including the moderators.	• Moderators. • Any participant invited to the podium by the moderator.
All on screen	All participants can see and hear each other.	All participants
Video lecture	Participants can see and hear only the moderators on the podium. The moderators can see and hear everyone.	Moderators

To create a quick conference:

1. Click the button in the application menu to open the **Conferences** section.

2. Click the **Start now** button.



!

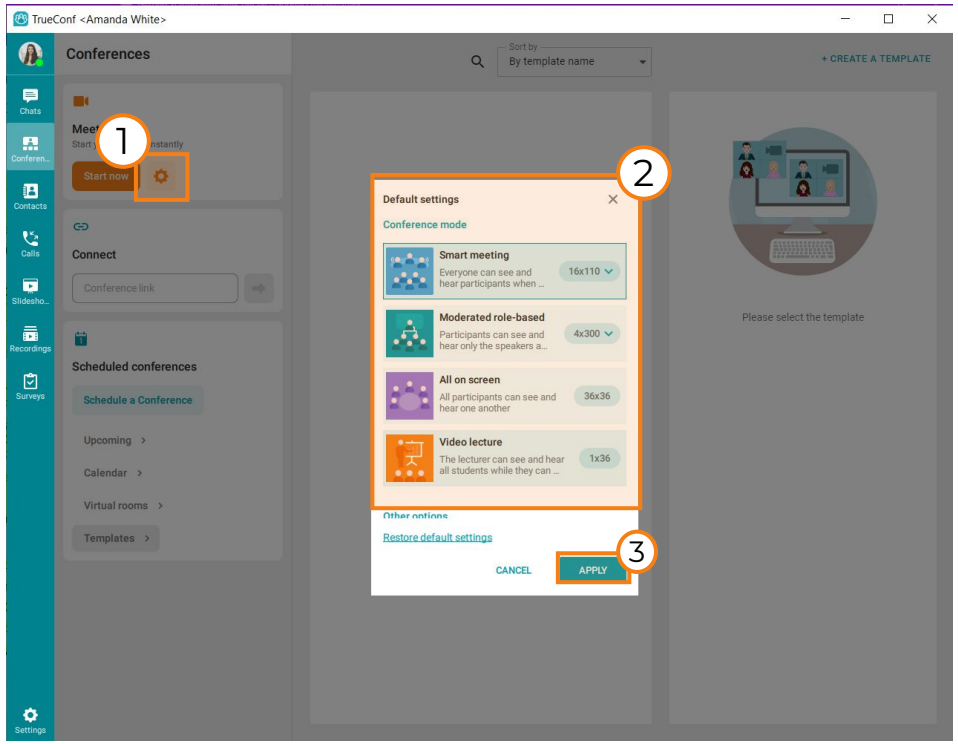
When a quick conference is created, smart meeting mode is selected by default. When participants join a conference, their microphones are automatically muted. You can also change the default parameters. Below, we will show how it can be done.

To set the parameters for quick conferences:

1. Click the button ⚙ and select the option **Change Default Settings:**

2. Set the parameters in the **Conference mode** and **Other options** sections

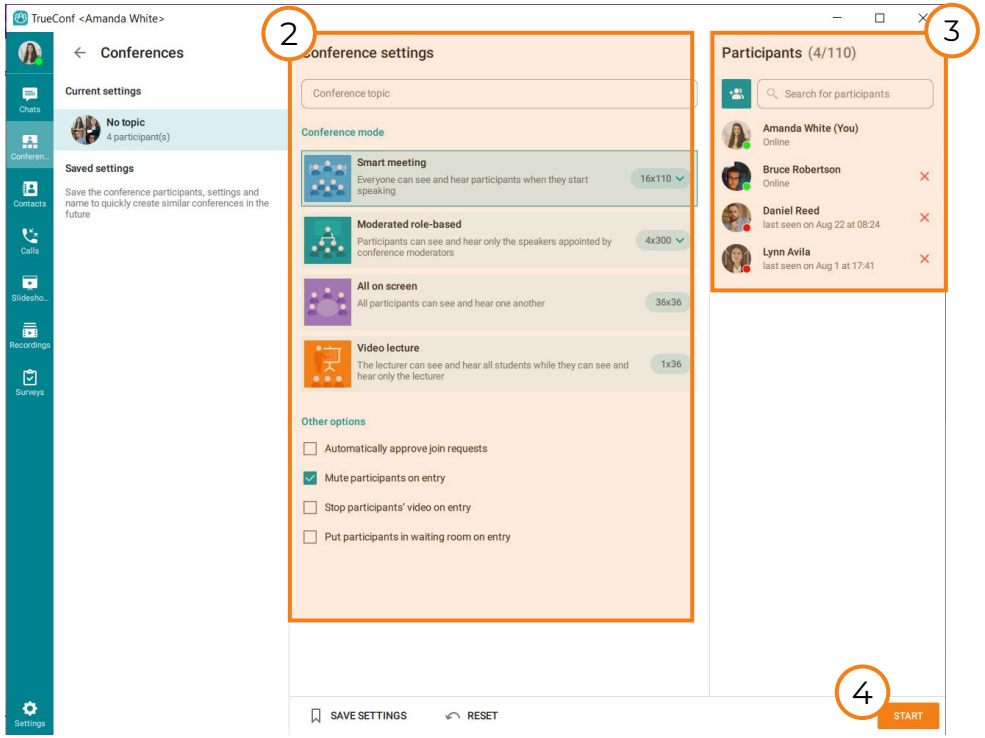
3. After setting the parameters, click **Apply** to save changes. Now when the **Start now** button is clicked, the meeting will always start with selected settings.



! When configuring default settings, you can also activate the **waiting room**.. To learn more about this feature, refer to this section.

To set conference parameters before the start:

1. Click the button and select the option **Configure and Start** .
2. Set the parameters in the **Conference mode** and **Other options** sections.
3. In the **Participants** section, click on the **Add participants** button if the list is empty or on the button if some participants have already been added. Select the participants who will be invited to the conference and click **Add**.
4. To start the conference, click **Start**.

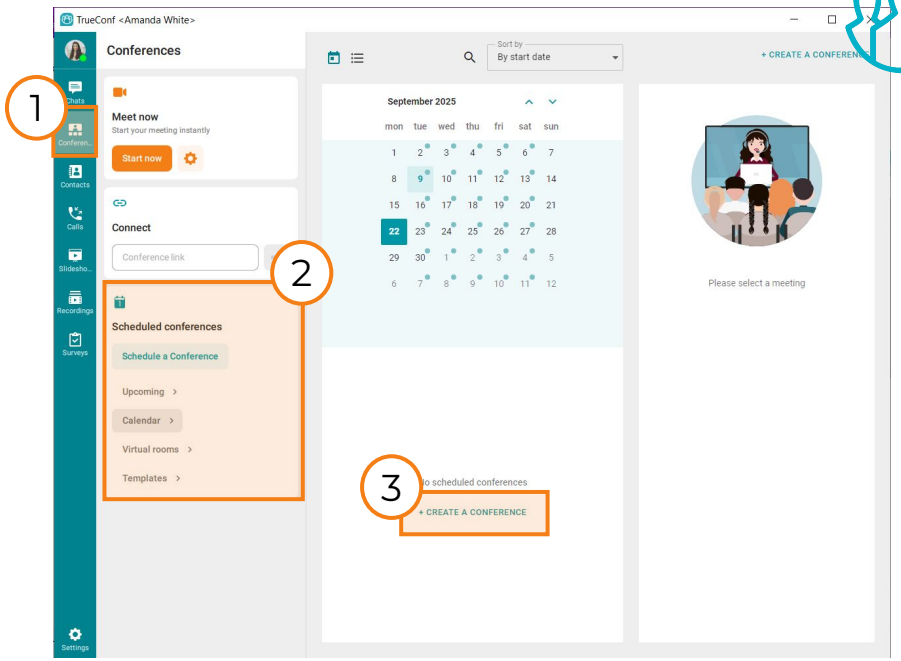


! When creating a conference, you can activate the **waiting room**. To learn more about this feature, refer to this section.

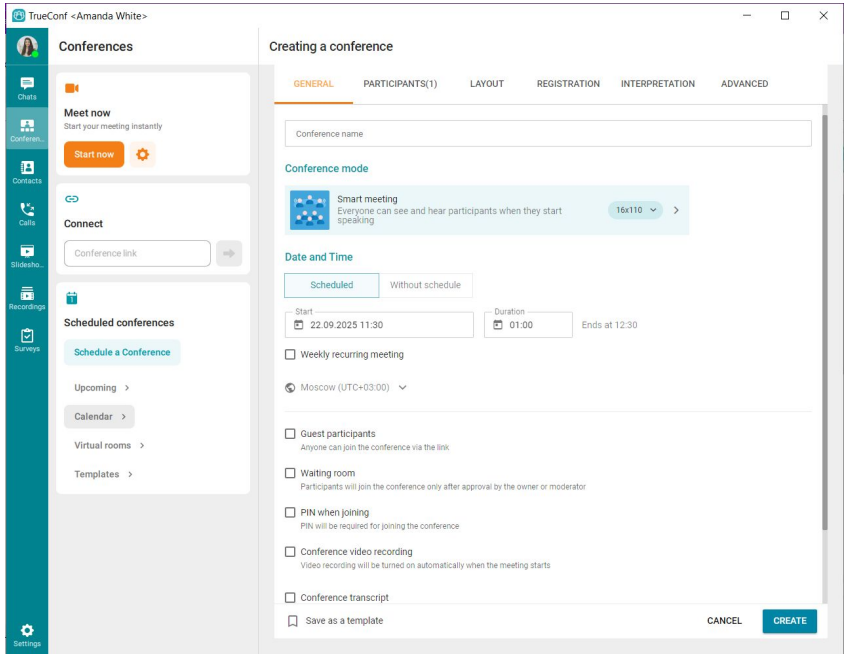
Conference scheduling:

A quick conference will be started at once and will be deleted immediately after its ending. If this option does not meet your needs, you can create:

- a **scheduled conference** that will start at the specified time. Only the owner (the person who created this conference) can join this event before its start.
- a **virtual room** which is a constantly available meeting that can be joined by participants at any time until this event is deleted.



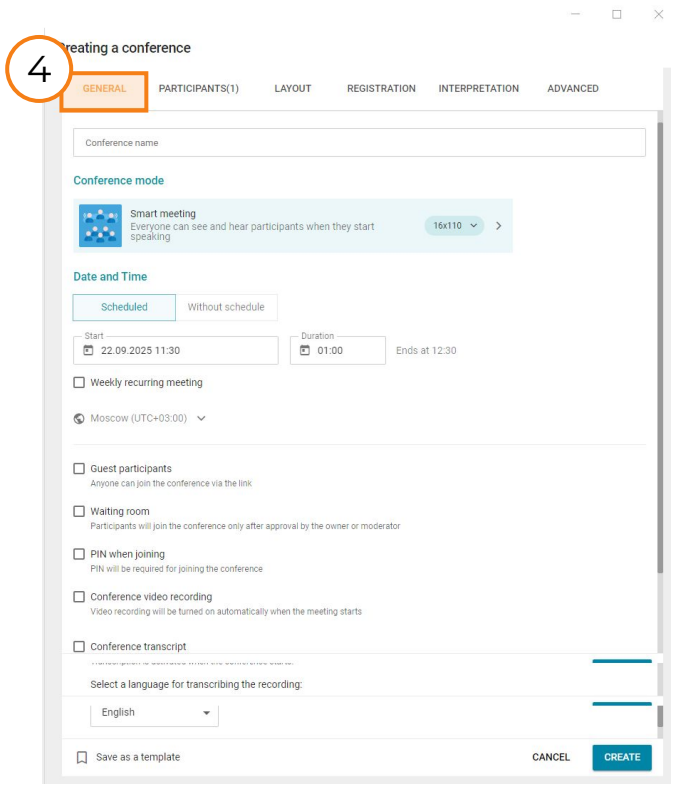
1. Go to the **Conferences** section.
2. Select either **scheduled conferences** or **virtual rooms**.
3. Click the button **+ Create a conference** in the selected section.



! **Simultaneous interpretation mode** enables you to appoint interpreters who will translate the presentation of speakers. This mode is helpful when you intend to hold an international conference with speakers from different countries.

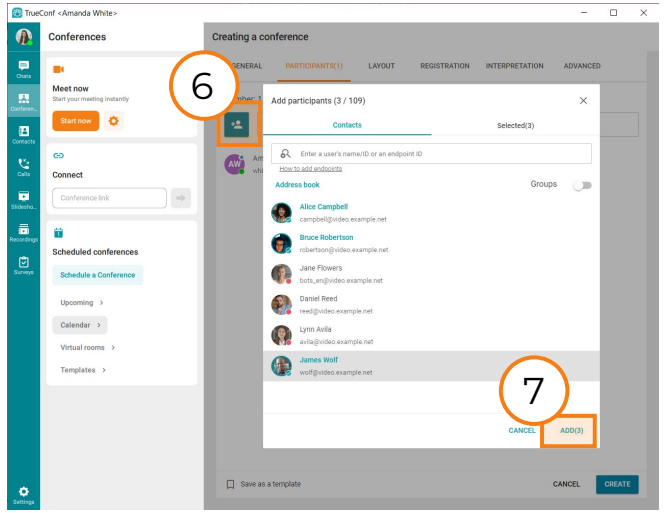
4 The **General** tab will open. Here, you need to specify:

- Conference name
- Conference mode. For role-based conference you can also specify the number of speakers on the podium and total number of participants.
- Launch type: a scheduled conference or unscheduled meeting (virtual room)
- Conference time and recurrence
- Choose if guest users should be allowed to join the conference
- Waiting room
- The use of PIN when participants join the conference
- Conference video recording
- Choose whether the conference transcript should be created. Integration with ***TrueConf AI Server*** is needed for using this feature.



5 Click on the **Participants** tab to start adding participants (or click).

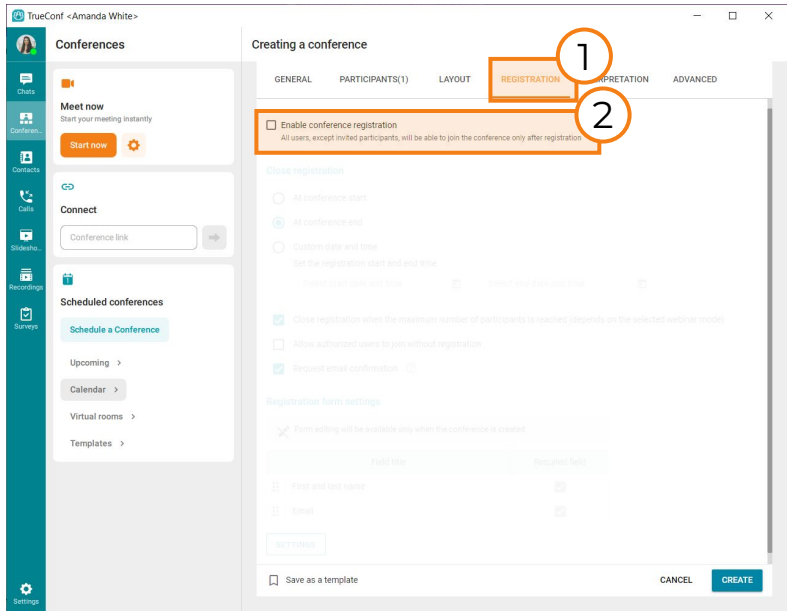
6 Select participants and click **Add**. If you are creating a conference with simultaneous translation, go to the **Interpretation** tab to select interpreters among participants and set language pairs.

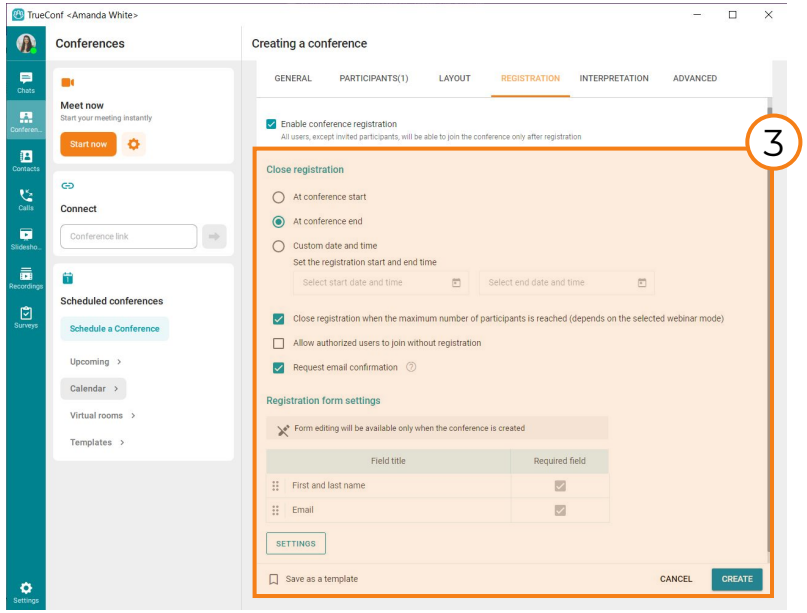


7 Double-check your settings and click **Create**.

! If you had previously activated conference video recording, as the conference owner, you will be able to download the recording when this event ends. To do it, just select a conference and click **Download recording** or **Conference recordings** (if there are many). To learn more, refer to the **Conference recordings** section.

Registration for public conferences





When a public conference is created, you can configure mandatory registration for guest participants. This means that anyone wishing to join your conference will have to complete the registration form first. This allows you to collect information about the participants and restrict access to unwanted guests.

1. Select the **Registration** tab when creating/editing conference.

2. Check the **Enable conference registration** box at the opened tab.

3. Then, configure the registration for your conference. Please note that you will not be able to change the fields of the registration form if you do it when a conference has already been created.

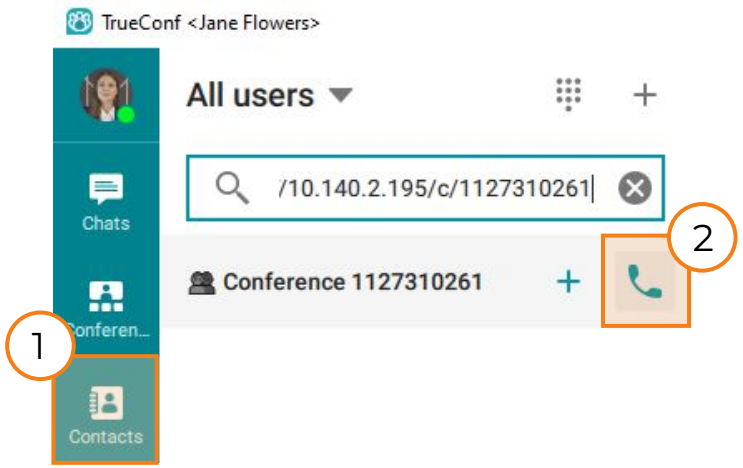
! Please note that the webinar registration is unavailable for SIP/H.323 endpoints and RTSP devices (such as IP cameras). They can join a public meeting only if the moderator adds them to the list of participants during when creating or editing the event, or invites them when the conference has already started.

Joining a conference

For TrueConf Server users

If you have a conference join URL

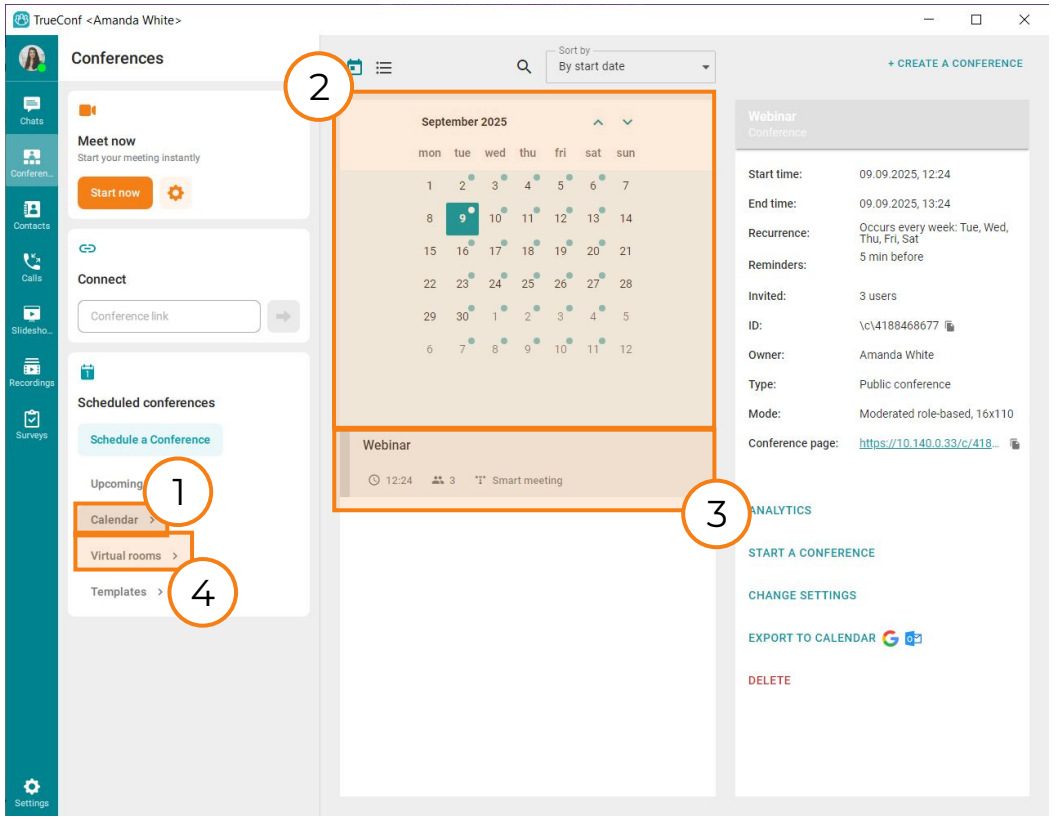
1. Click in the application menu to open your address book.
2. Enter the conference join URL in the search field and click the call button .



From the conference scheduler:

! In the scheduler you can see the list of the conferences you have created, as well as the meetings to which you have been invited as a participant.

1. Click in the application menu and select **Calendar.**
2. Choose a necessary date in the calendar.
3. Select a conference from the list and then click **Start a conference**, to start it, or **Connect to the conference** to connect to the ongoing meeting.
4. Go to **Virtual rooms** tab for a list of permanently available conferences.

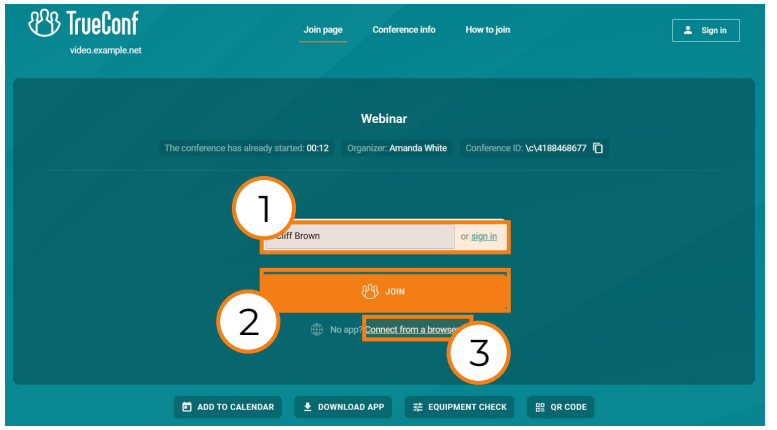


! If the conference is scheduled in advance, all participants will be automatically invited when the conference starts.

For guests (users who don’t have an account on your TrueConf Server)

Connecting via a browser:

To join the conference, you should have a conference join link. Open it in your browser.



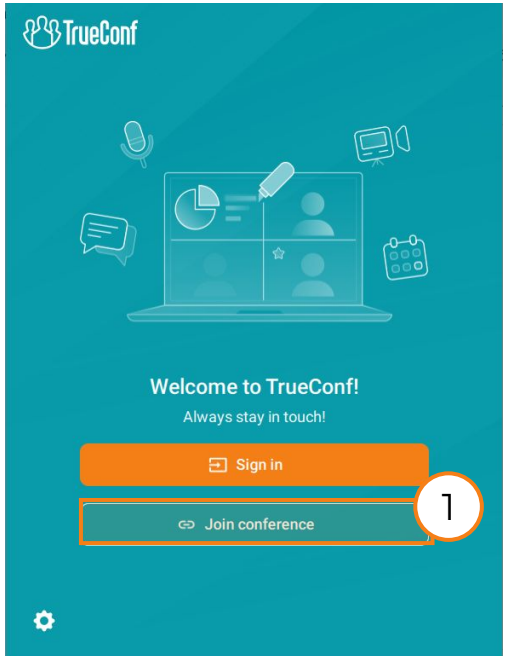
1. Enter your full name and click ✓.
2. If you have TrueConf client application installed, click **Join**. You will be connected to the conference right away.
3. If you don't have TrueConf application and you don't want to install it, click the button **Connect from a browser**. After granting your browser permissions to access your camera and microphone click **Connect**.

! If the conference hasn't started yet, you will see the meeting countdown on the conference web page.

You can add the conference to your Google Calendar or any other calendar right away by clicking **Add to calendar**.

Connecting from a client application:

To join a conference from a client application, you will need to have a link to this event. However, if you are already connected to the server where the conference is hosted, you will only need to know the conference ID (CID). Note that this method is not suitable for joining a conference in which registration is required.



1. Click the **Join Conference** on the application’s home page.
2. Enter the conference link (or the Conference ID if you are already connected to the server where conference is hosted).
3. The menu for configuring a guest connection will open. Enter your name, configure devices, and click the **Join** button.

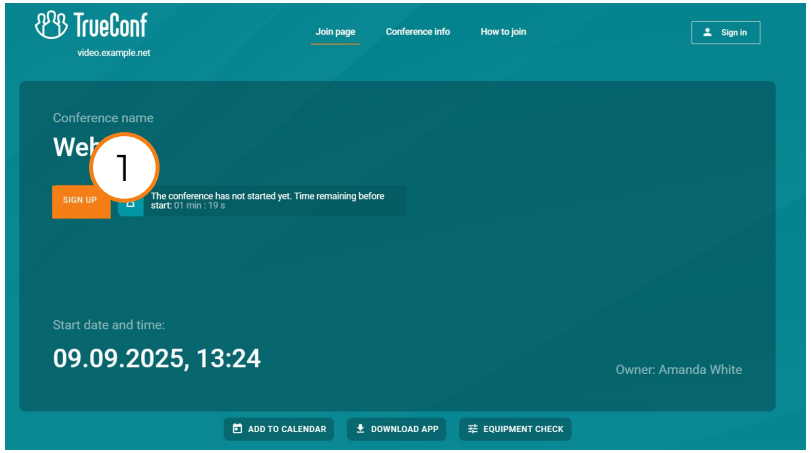
Webinar registration

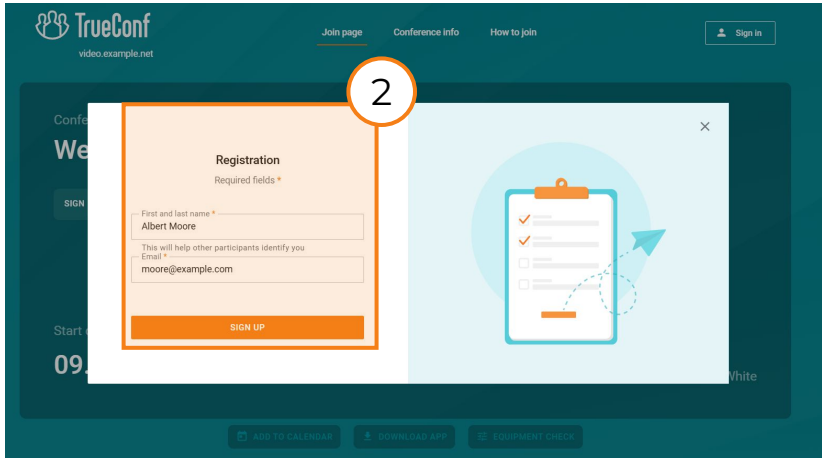
To join a public conference (webinar), registration may be required:

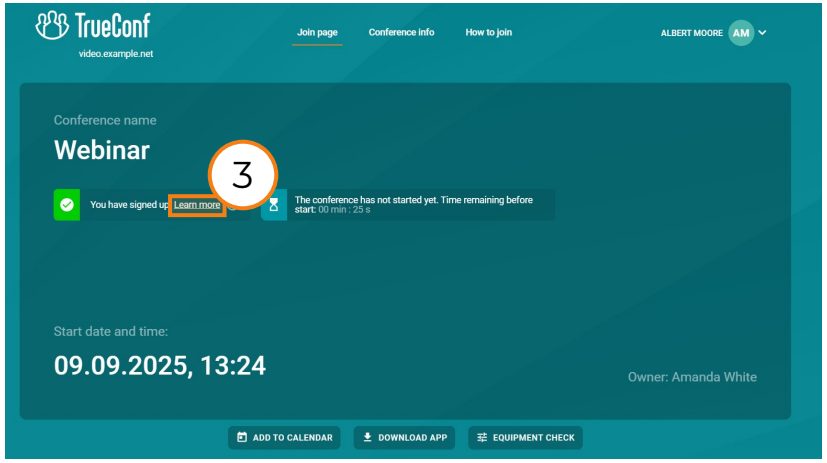
1. Click the **Sign up** button at the conference guest page.

2. Enter your details (required fields are marked with an asterisk) and click **Registration**. If the server is configured to send invitations, you will receive a connection link in your email. Otherwise, you will have to click the **Copy link** button in the pop-up window, and save the link somewhere.

3. If needed, you can change your details by following your conference connection link and clicking on **Learn more**.







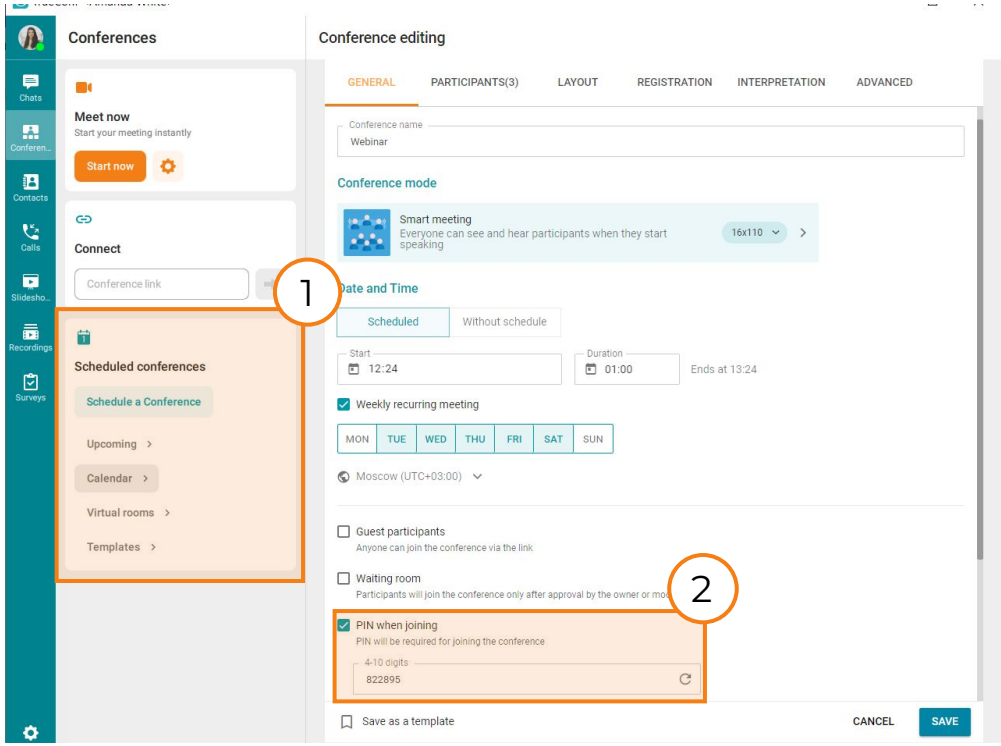
! Please note that the webinar registration is unavailable for SIP/H.323 endpoints and RTSP devices (such as IP cameras). They can only join a public meeting if a moderator adds them to the list of participants when a conference is edited or created, or invites them when the conference has started.

PIN-protected conference

To create a PIN-protected conference:

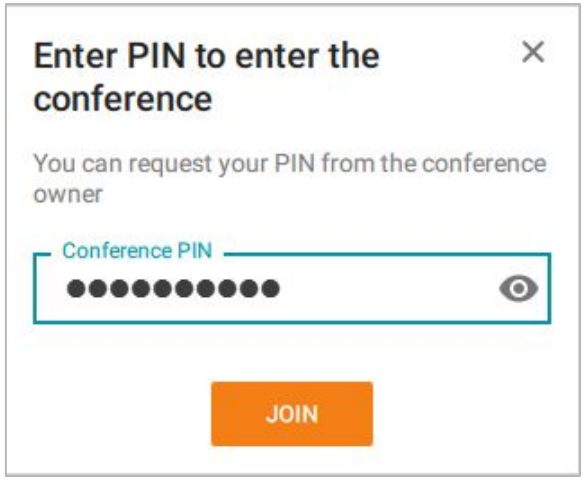
1. Click in the application menu and select **Scheduled conferences**.

2. On the **General** tab, check the box **PIN when joining**. The PIN code will be generated automatically. You can click to refresh or set your own PIN in the field below.



! You can limit access to unregistered webinar guests with **Registration** tab. This feature is described above.

Joining a PIN-protected conference



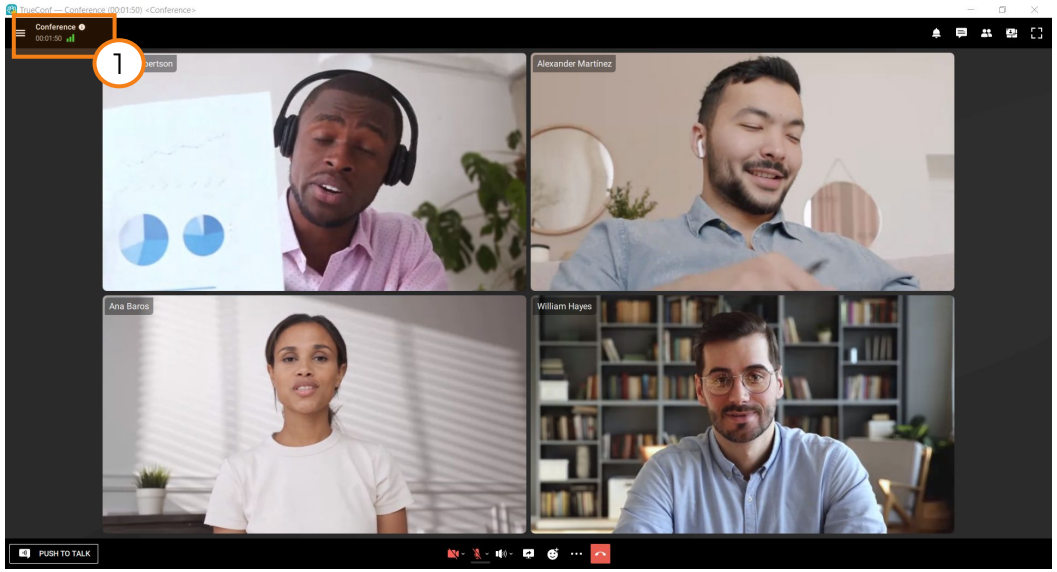
If the conference is PIN-protected, enter the PIN in the corresponding field and click **Join**.

! TrueConf Server provides multiple security levels: from basic to cryptographically impregnable. TrueConf meetings are encrypted and protected from third-party access, while user data is safely stored within your company's infrastructure.

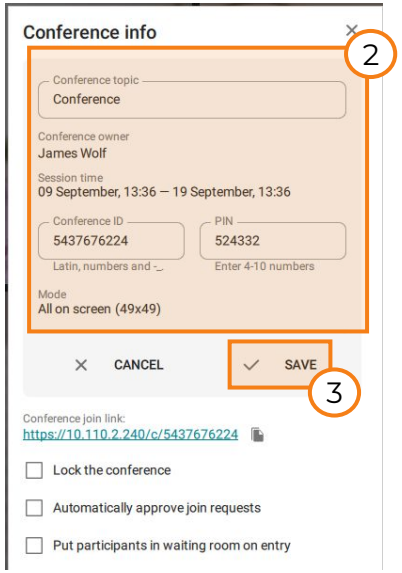
How to change a PIN-code for the ongoing meeting

If you are a conference moderator, you can set or change the PIN code right during the meeting. To do it:

1. In the window of an ongoing conference, click the button in the upper left corner.



2. In the **Conference info** pop-up, click the **Edit** button and you will be able to set a new PIN code.



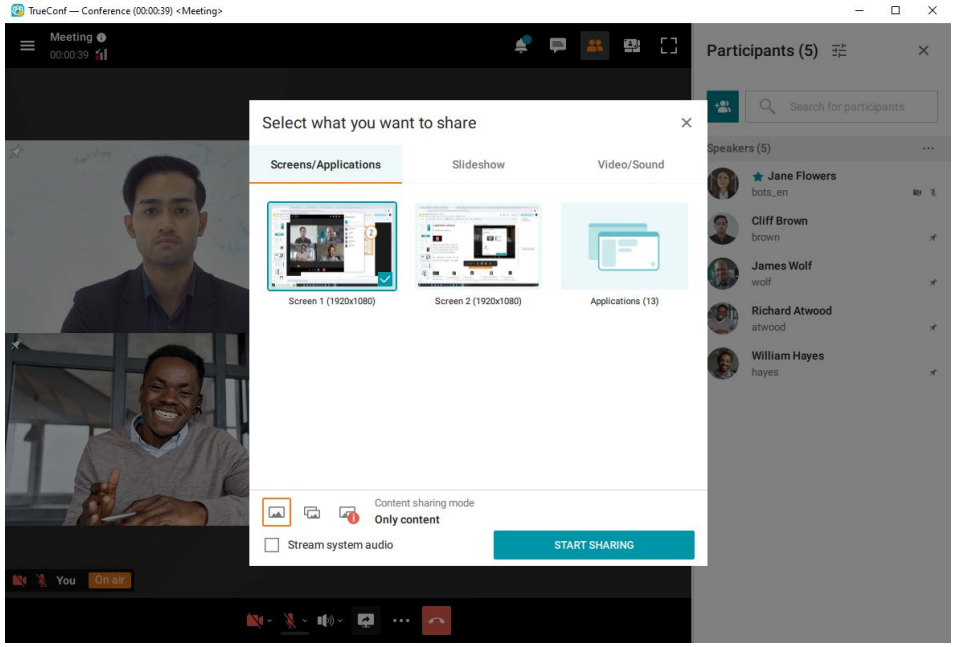
3. Next, click **Save**. The specified PIN code will be saved and used every time when the conference is started.

Conference features

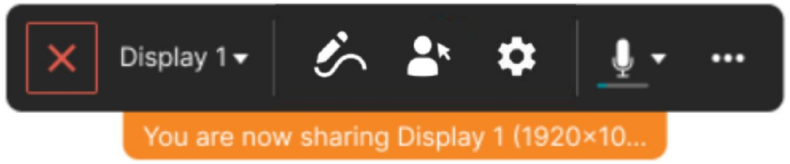
Sharing a screen or separate application windows

1. Click at the bottom of the conference window or press the **Ctrl + S** shortcut.

2. Select the screen or application you would like to share with other meeting participants. If you need to share audio also, check the corresponding box in the left bottom corner. Then click **Start sharing**. Content sharing will start immediately.

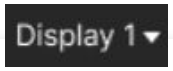


When content sharing starts, the application window will be minimized and the floating meeting controls will be displayed in the upper right corner of the screen:



Minimize / maximize widget

Stop content sharing



Selection of content source and management of audio streaming (button text changes depending on the content source)

Annotating over the shared content (check next slide to learn more about this feature)

Shows list of participants who gained remote control over your desktop

The button for adjusting the settings of content sharing (select if content should be shared in the user's video window or in a separate stream).

Opens advanced conference controls.

Annotations over shared content

Content annotation tools are available only when the entire screen (not just one of the application windows) is shared in the user's video window. If content is shared in a separate stream, annotation tools will be unavailable.

You can always make annotations over the shared content. To start annotating, click on the button in the stream control panel. The panel with drawing tools will be displayed in the left part of your screen.

Enables a user to switch to the OS mouse cursor

Button to drag annotations

Button for drawing

Button to create text blocks

Button to add standard figures like a rectangle, square, or star

Button to activate the pointer which helps to draw the audience's attention

Button to select the color of drawings and text

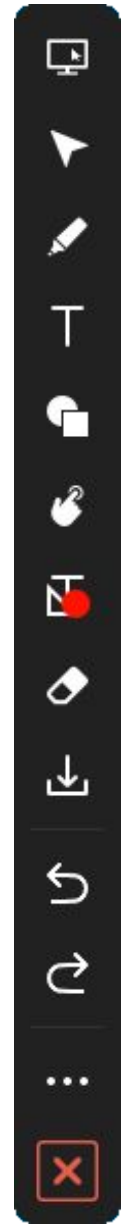
Button to delete created objects

Download the annotation as an image

Button to delete created objects

Button that opens the menu with additional options

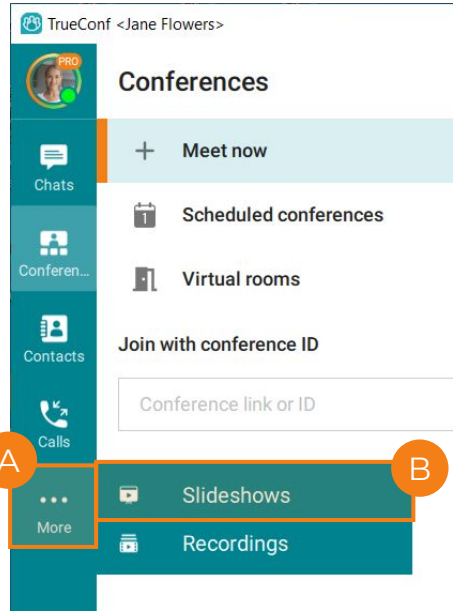
Exit annotation mode

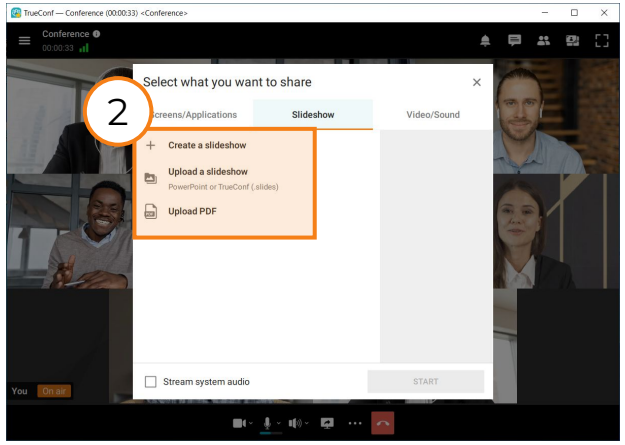


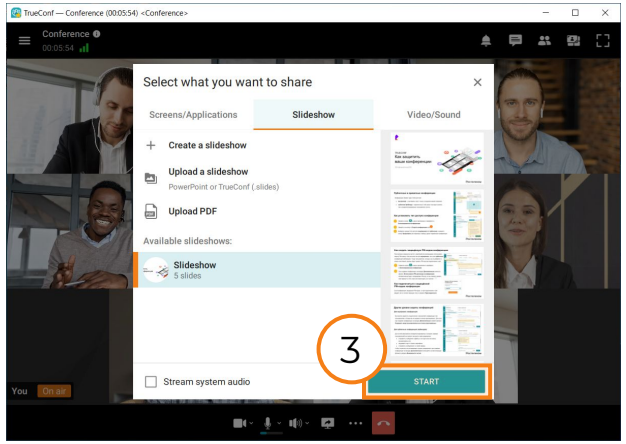
Sharing slides and PDF files

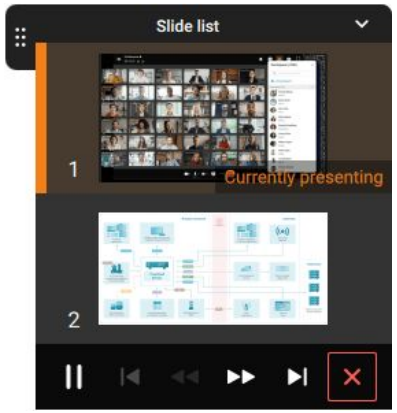
Before the conference starts, you can prepare your slides in advance.

To do it , click More in the application menu and select **Slideshows**.









If you are a Windows user and have a Microsoft PowerPoint installed, you can import your presentations from **PPT** and **PPTX** files. If you are a Mac user, you can import images and pages from PDF files.

1. Click on the at the conference control panel. Select **Slideshow** in the context menu.

2. A slideshow window will open:
   - Click to create a slideshow from images.
   - To import a *.ppt / .pptx / .pdf / .odp / .slides* click **Upload slideshow.** After uploading the slideshow, click the **Start** button in the bottom right corner.
   - It is also possible to choose the slideshow created in advance.

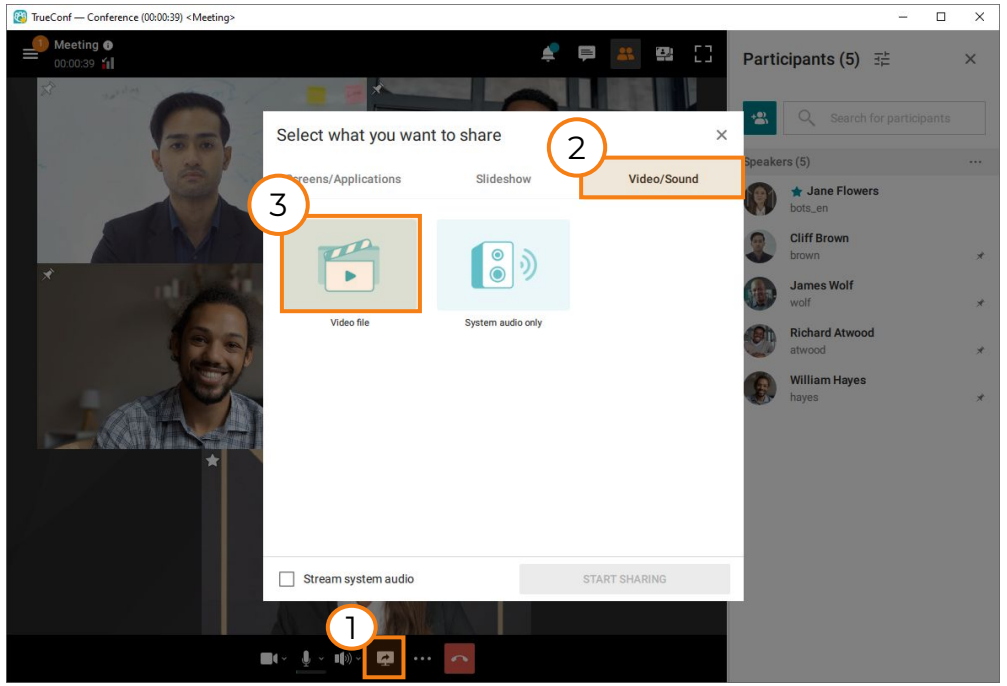
   If you need to stream sound along with the slideshow, check the corresponding box in the bottom left corner.

3. After importing the file, click **Start sharing**.

During content sharing a management widget is displayed. This widget includes buttons for navigating through the slides, a button to pause the slideshow (slideshow will not be shared when paused) and a button to stop slideshow.

Streaming video files and system audio

You can stream video files during a conference. To do it, take these steps:



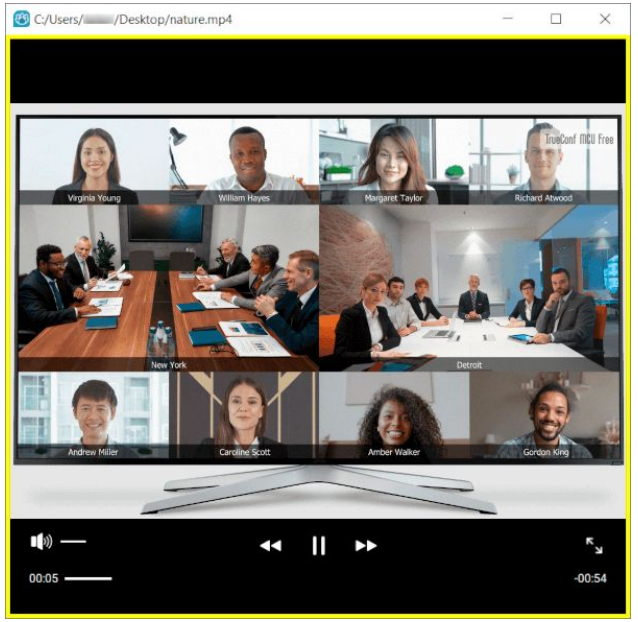
1. Click on the button in the meeting control panel.

2. Go to the **Video/Sound** tab in the pop-up window.

3. Select **Video file** in the opened tab.

4. The file explorer will open on your OS; here, you need to select the file that will be streamed.

5. Then in the Video file section, you will see the name of the uploaded file. Additionally, there will be the button .
   By clicking on it, you can select a different file for streaming.



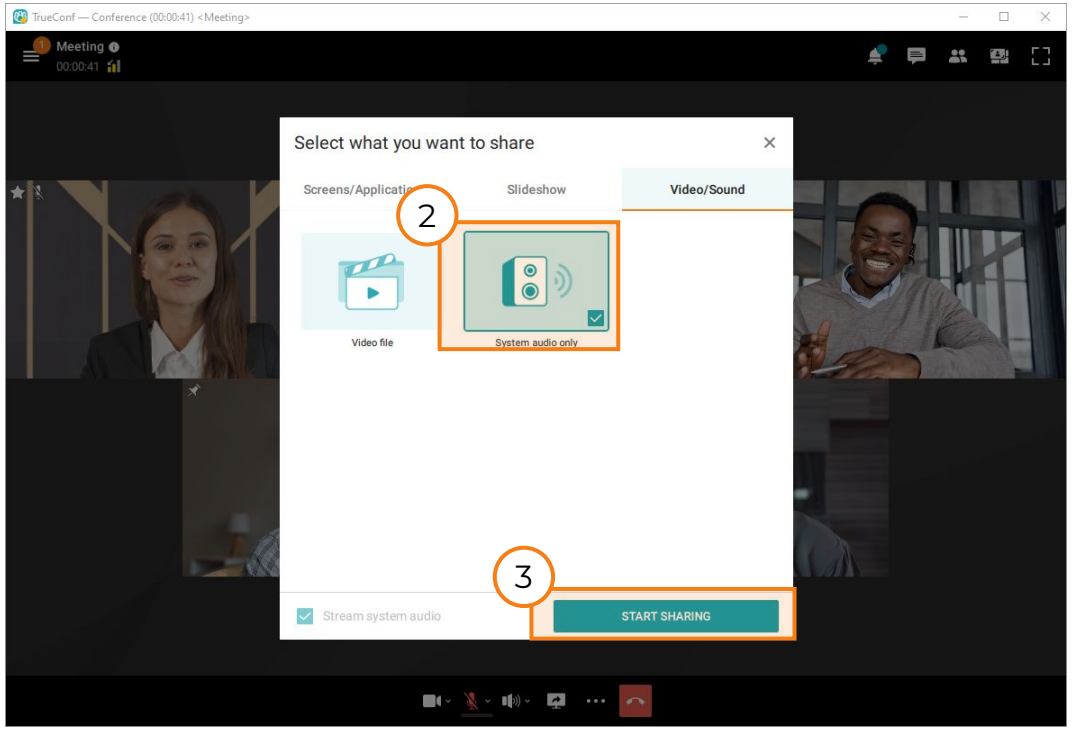
! The box **Stream system audio** will be checked by default. If you uncheck this box, meeting participants will not be able to hear the audio track from the video file.

6. Click on the button **Start sharing**. Video file streaming will begin. There will be a separate window for managing this stream. To end streaming, close the stream management window.

! The following file formats can be used for streaming: avi, mkv, mp4, and webp.

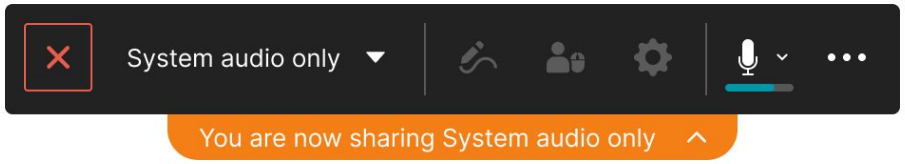
You can stream the audio from your operating system without sharing video. For example, you can play a sound track in the media player for your colleagues. To do it:

1. Follow the steps 1 and 2 from the video file streaming guide at this slide.
2. Select **System audio only** in the opened tab.
3. Click the **Start sharing** button.



The content management widget will be displayed and conference participants will hear all sounds played at the system level.

To stop sharing system audio, click on the ✕ button on the content management widget.



Turning on/off your microphone, camera, and speakers

During a conference you can turn on/off your audio and video devices in the bottom of the window:

- to mute/unmute microphone, click
- to turn on/off camera, click
- to mute/unmute speakers, click .

A muted device is indicated with a crossed icon, e.g., . Click on this icon to turn your device on.

! Even if you have turned off your microphone, you still can send an audio remark at any time during the conference.

To do it, click **Push to talk** on the left side of the conference control panel (or **Space / CTRL + T** shortcut).

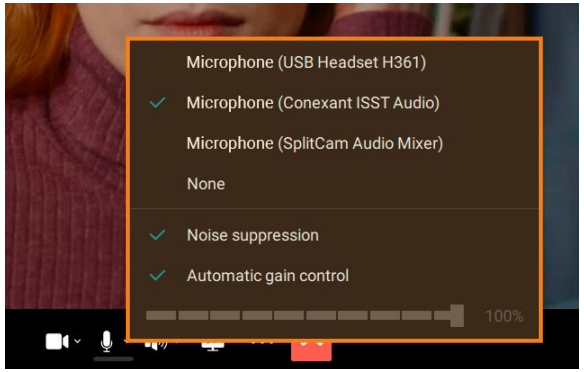
Choosing other microphone, camera, speakers:

To switch to another device during a conference:

1. Click the button near the selected device icon or right-click on the device icon.

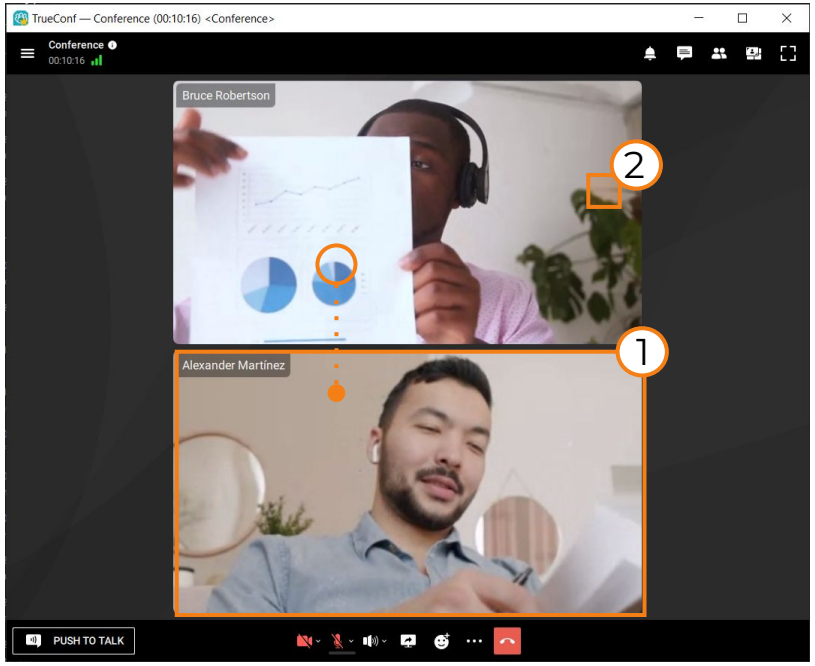
- – change your microphone
- – change your camera
- – change your audio output device.

2. Select a device in the list. In this menu you can also enable noise suppression and automatic gain control.



! You can also quickly switch between your cameras by clicking icon on your self-view during the conference.

Video layout settings

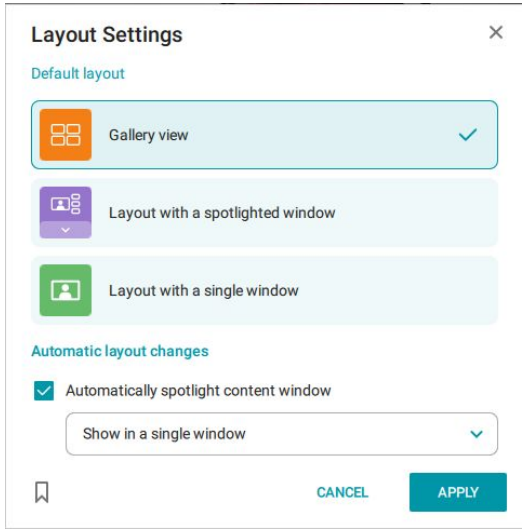


1 To swap participants' windows in the layout:

- Click and hold the window that you want to move.
- Drag it over the window that has to be replaced.
- Release the mouse button and participants' windows will swap.

2 To display a participant in a larger window.

To enlarge a window and display it in the center of the layout, double-click on this window. Other windows will be made smaller and placed around the enlarged window. To restore the previous layout, double-click on the enlarged window.

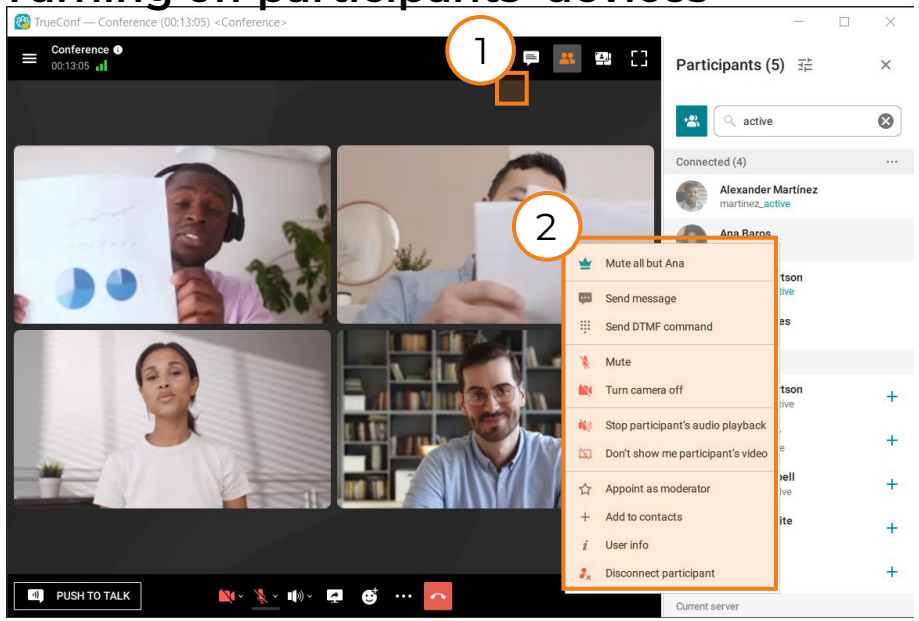


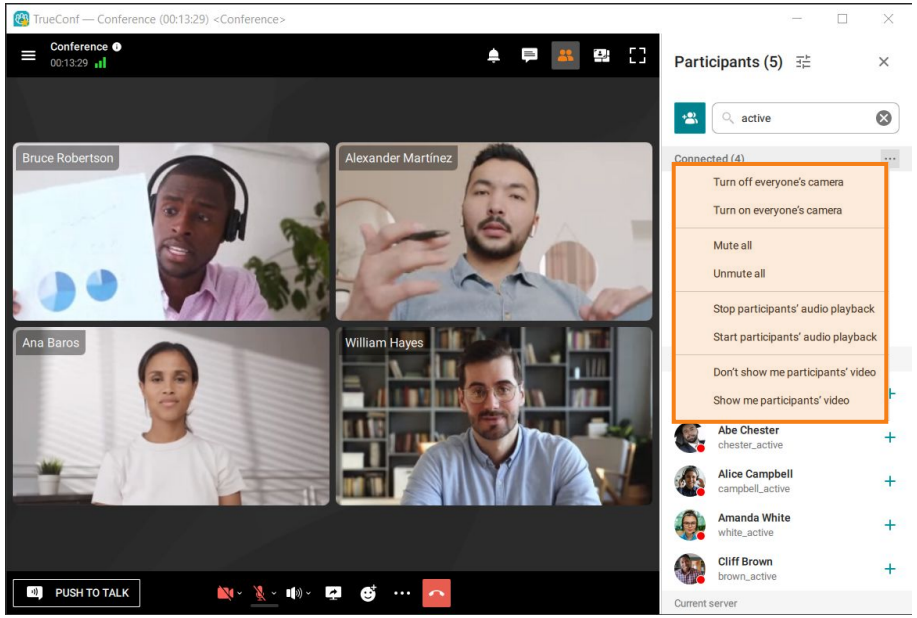
3 To make larger changes in the local layout, click

You will open a pop-up window where users can select one of the three layout types, configure the parameter Automatic layout changes and specify the behavior of the layout in cases when a participant's window is automatically enlarged:

- Show only the enlarged window while the windows of other participants will be hidden.
- Display the participant's video in a separate application window.
- Display the video in a spotlighted (enlarged) window in the layout.

Turning off participants' devices





1. Click the button in the upper right corner of the conference window to open the list of participants.

2. Right-click on a participant and select one of these options:

   - **Mute all, but Participant's Name** (mute microphones of all participants, except the selected user);
   - Turn on/off microphone/camera (available only for conference **moderators**) to start/stop audio and video of those users to other meeting participants;
   - Do not receive audio or video (available **for all participants)** - only you will stop receiving audio/video from the selected participant.

! The actions described above can be performed for multiple participants at the same time. To do it, click in the list of participants and select the required action.

Waiting rooms

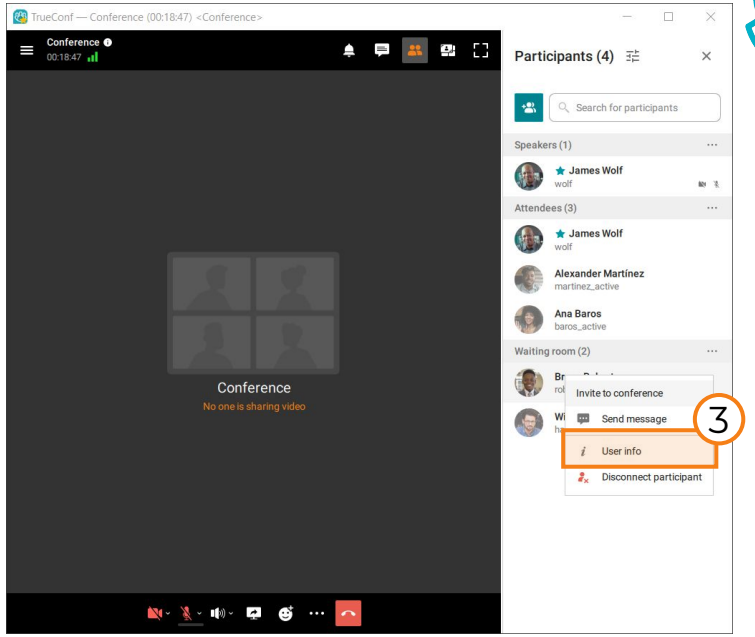
When creating or editing a conference of any type, you can check the box **Waiting room** in the **General** tab. You will also be able to select the category of users who will be directed to the waiting room instead of joining the conference directly. The user, who is put in the waiting room, will be unable to see or hear other participants (and vice versa). Additionally, this person will be unable to access collaboration tools. A participant can be moved to the waiting room only by moderators (including the owner).

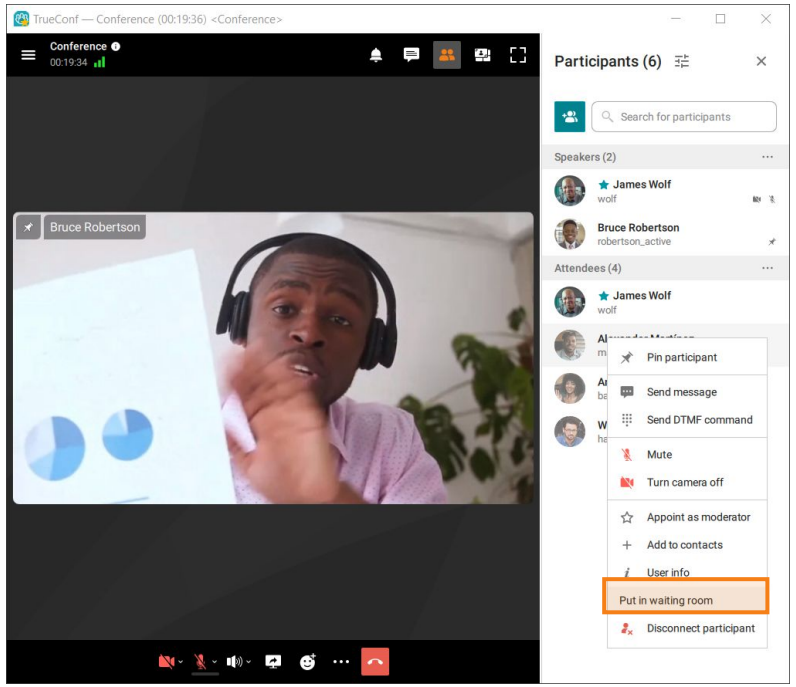
To invite a user from the waiting room to the conference, follow these steps:

1. Click in the upper right corner of the conference window.

2. Right-click on the participant In the **Waiting room** section.

3. Select **Invite to conference** in the context menu.





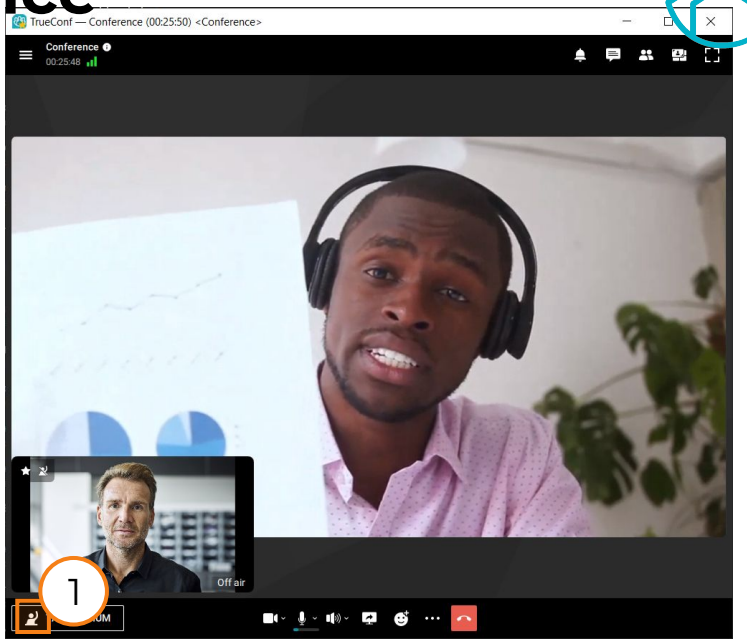
Similarly, you can send a participant to the waiting room. To do it, right-click on a user in the list of participants and select the option **Put in the waiting room**.

! Waiting rooms are also available when creating a quick conference, if you check the **Waiting room** box when creating or editing the event (refer to the slide about creating a quick conference).

Moderated role-based conference

Roles description

In a **moderated role-based conference**, only the speakers on the podium can be seen or heard. Besides, only a speaker can share the screen and show slides. Any attendee can make an audio remarks without taking the podium. However, if necessary, this option can be sometimes disabled in the conference settings for everyone (except the owner and moderators). In this mode, all users can be divided into two groups: moderators and regular participants.



If you are a speaker, you can:

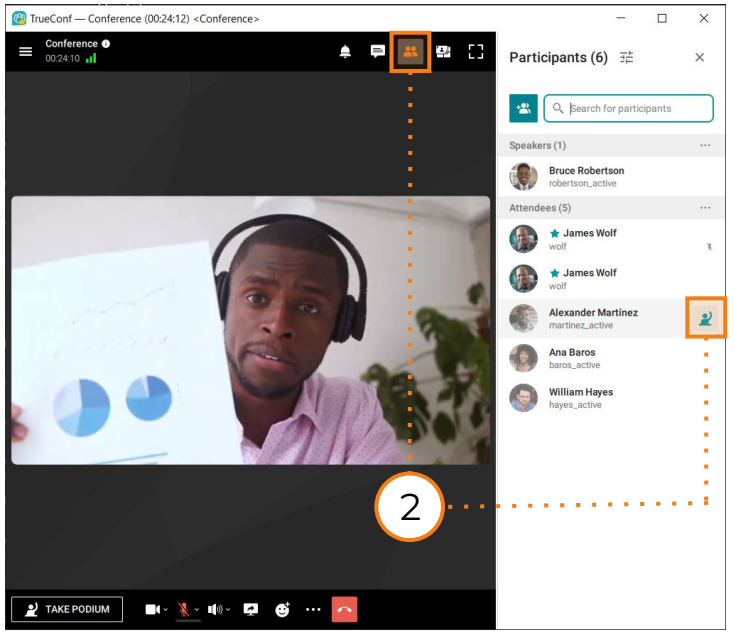
1. **Take the podium**

   To do it, click the **Take podium** button in the control panel, or use the **Ctrl + U** shortcut.

   To stop your presentation, click the **Leave podium** button which will be displayed instead of the **Take podium** button.

2. **Invite another participant to the podium**

   To do it, click the button in the upper right corner of the conference window. When the list of participants opens, move your mouse over the attendee and click .



! Note: when a role-based conference starts, only the conference owner automatically takes the podium (not the other speakers).

If you are an attendee, you can:

1

Make an audio remark without taking the podium

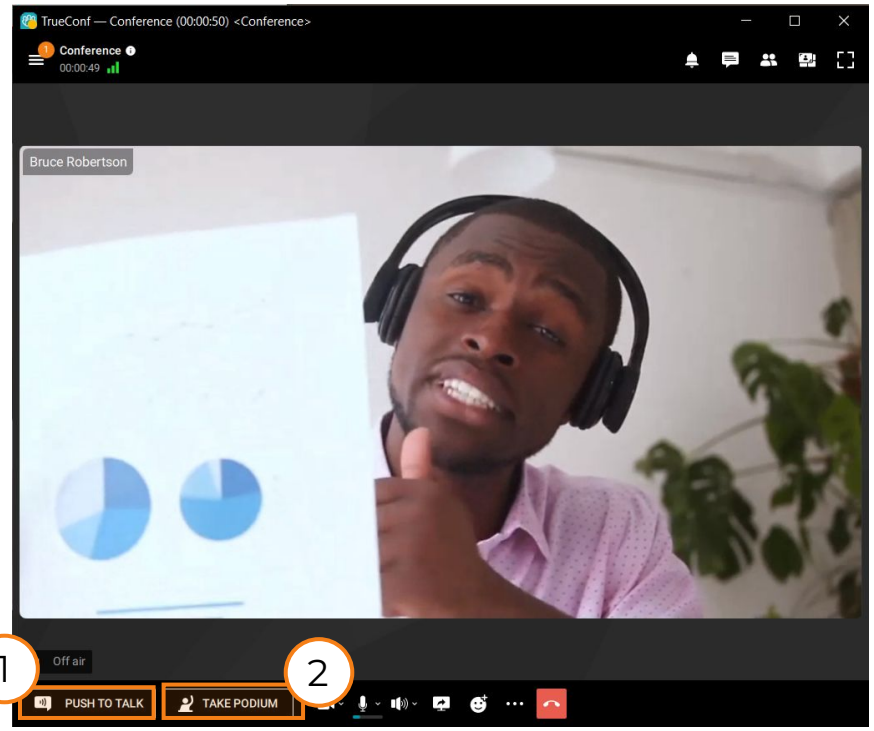
To do it, click and hold down the **Push to talk** button at the bottom of the screen (or use the **Space**/**Ctrl + T** shortcut).

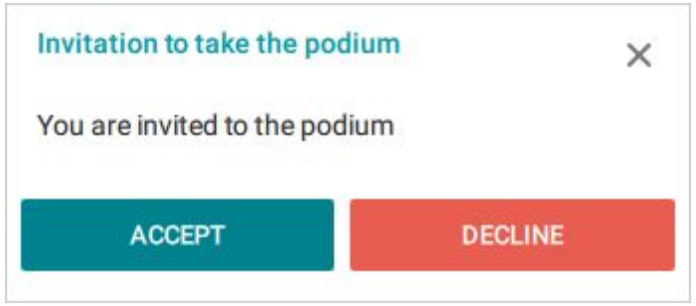
2

Make a presentation

To do it, you need to send a request for the podium: click **Take podium** at the bottom of the screen or use the **Ctrl + U** hotkey.

A request will be sent to the moderator and, if confirmed, you will be added to the podium as a speaker.





!

The moderator can invite you to the podium, and then you will get a corresponding request. If you agree to speak, click **Accept**.

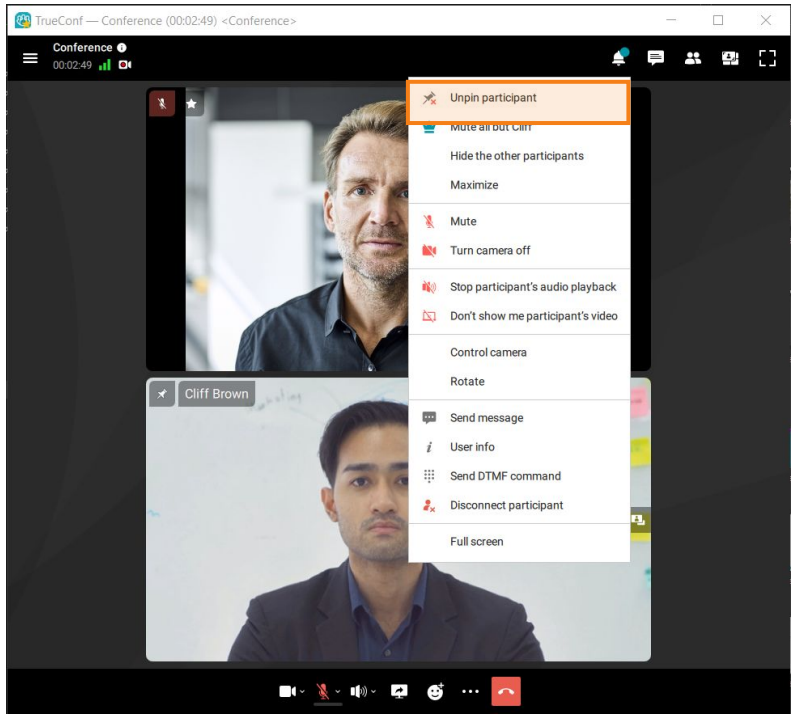
Smart meeting

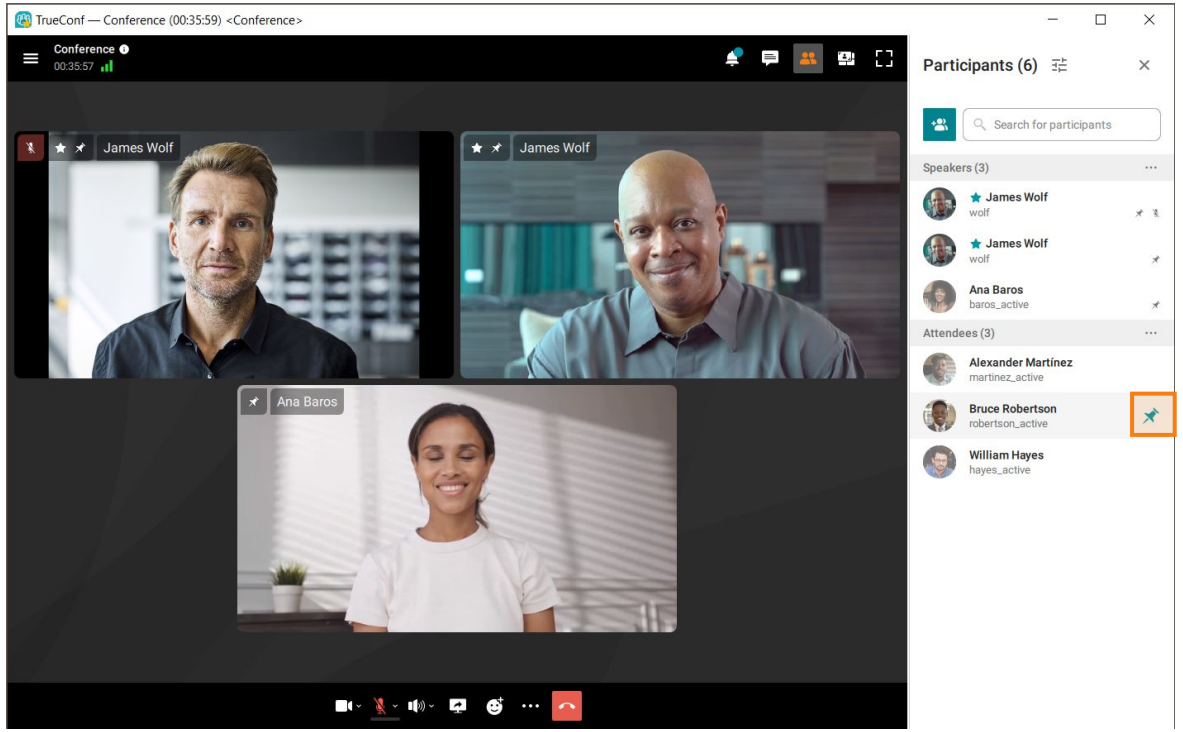
Features of smart meeting

Smart meeting mode is similar to a moderated role-based conference. The difference is that in this case the participant, who is speaking or sharing content, will be automatically displayed in the layout. If several participants are speaking at the same time, the priority will be given to the participant who is speaking louder. In smart meeting mode, the number of spots on the podium is set when a conference is created. If you are configuring the layouts manually, you can select different window types, but at least one of these windows have to be of the **Active speaker** type.

The moderator can pin any participant on the podium to make sure that this user is not replaced even when he/she is silent. To do it, right-click on this participant's video window. Select **Pin participant** in the context menu. It is also possible to click on the button displayed when hovering the mouse over a speaker in the list of conference participants. Similarly, you can unpin a participant with the icon or via the context menu. When a participant is pinned in the layout, microphone will be automatically unmuted.

Please note: when a smart meeting is created, the **Mute participants on entry** box is checked by default. It is done to make sure that a participant cannot take the podium by accident until he/she intentionally unmutes the microphone. This setting does not mute microphones on the side of SIP/H.323 endpoints.





Smart meeting with different types of connections

Client applications that do not support smart meeting mode

Smart meeting mode is available for TrueConf client applications starting from version 8.2.1. If a participant joins a smart meeting from the application that does not support this mode, this meeting will become a moderated role-based conference for this user. In other words, he/she will need to click on the **Take podium** button to take the podium and the moderator will see the corresponding join request. When this participant takes the podium, he/she will be automatically pinned. The moderator can also pin this participant on the podium by clicking on the button; in this way, this participant will become a presenter. To leave the podium, this user will need to click on **Leave podium** or the moderator can unpin him/her with the button.

SIP/H.323 endpoints and RTSP devices

The participants, who join a smart meeting from SIP/H.323 endpoints, and RTSP connections (for example, IP cameras) take the podium when they start speaking or if they are pinned in the layout just as client applications. If an endpoint with a muted microphone starts sharing content in the secondary stream, it will also be added to the layout.

Browsers (via WebRTC)

The participants who join a smart meeting from a browser (via WebRTC) take the podium when they start speaking or when they are pinned in the layout by the moderator. Such participants can become speakers even with a muted microphone when they start content sharing.

Switching between conference modes

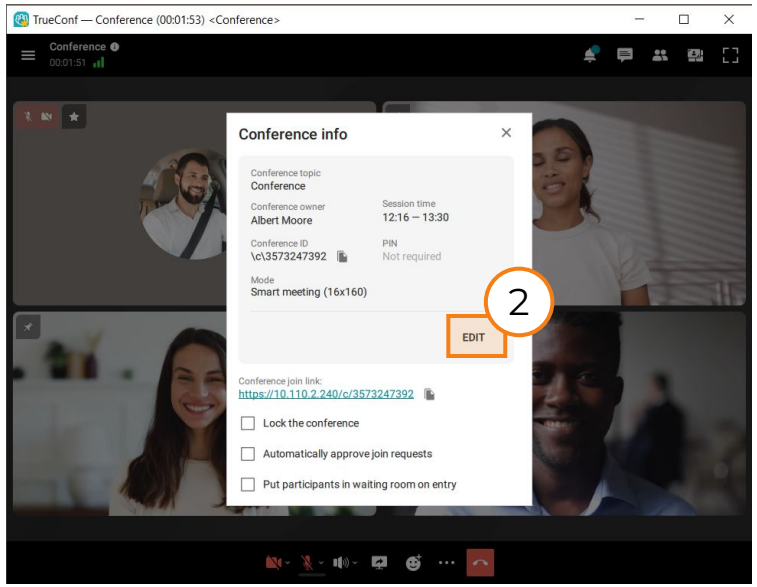
During a smart meeting conference you can switch to a **moderated role-based** conference. To do it:

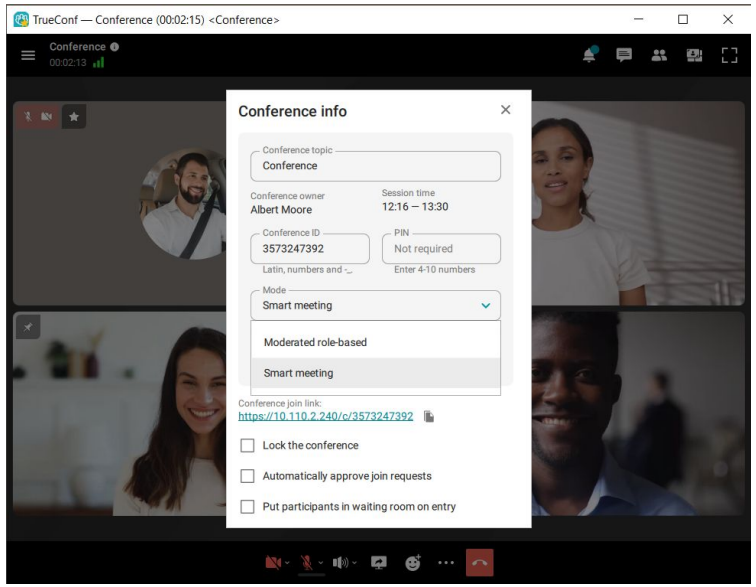
1. Click the ⓘ button, in the top left corner of the conference window.

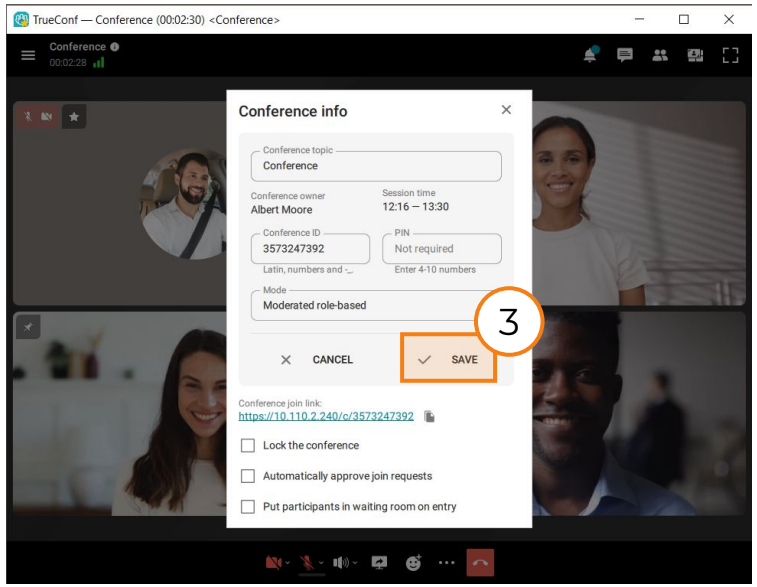
2. Click the **Edit** button in the pop-up window.

3. Select the **Moderated role-based** option in the **Conference mode** drop-down list and click **Save**.

> ! In the same way you can switch conference mode from **moderated role-based** to **smart meeting**.

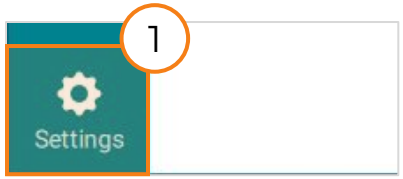




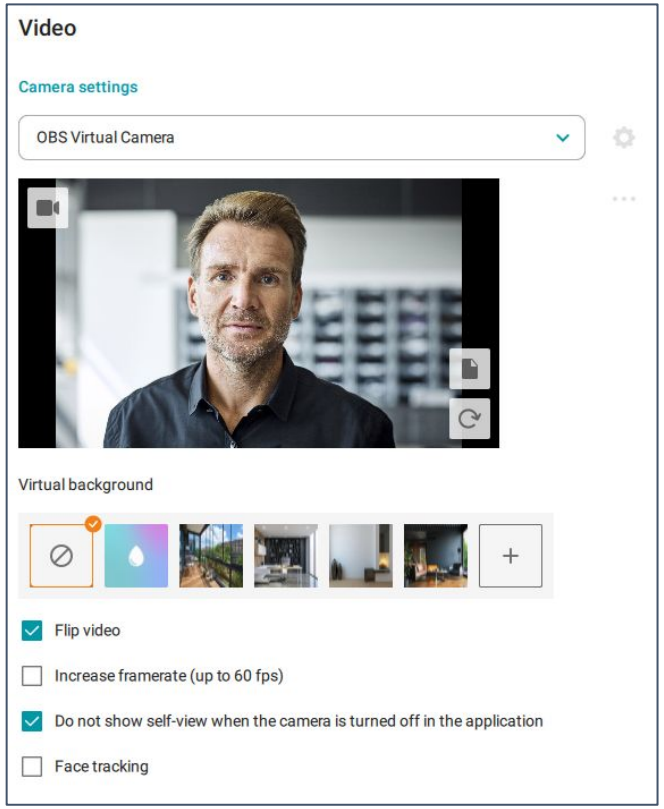


Application settings

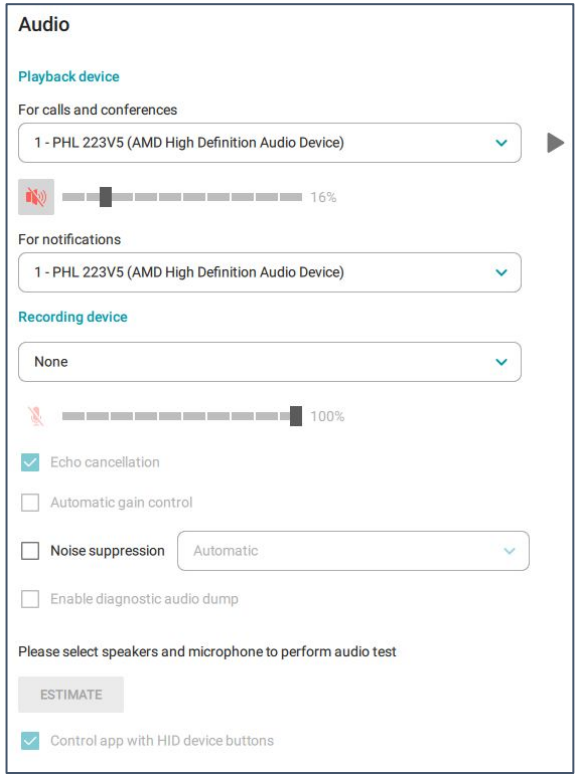
1 Click Settings in the application menu to open the settings.



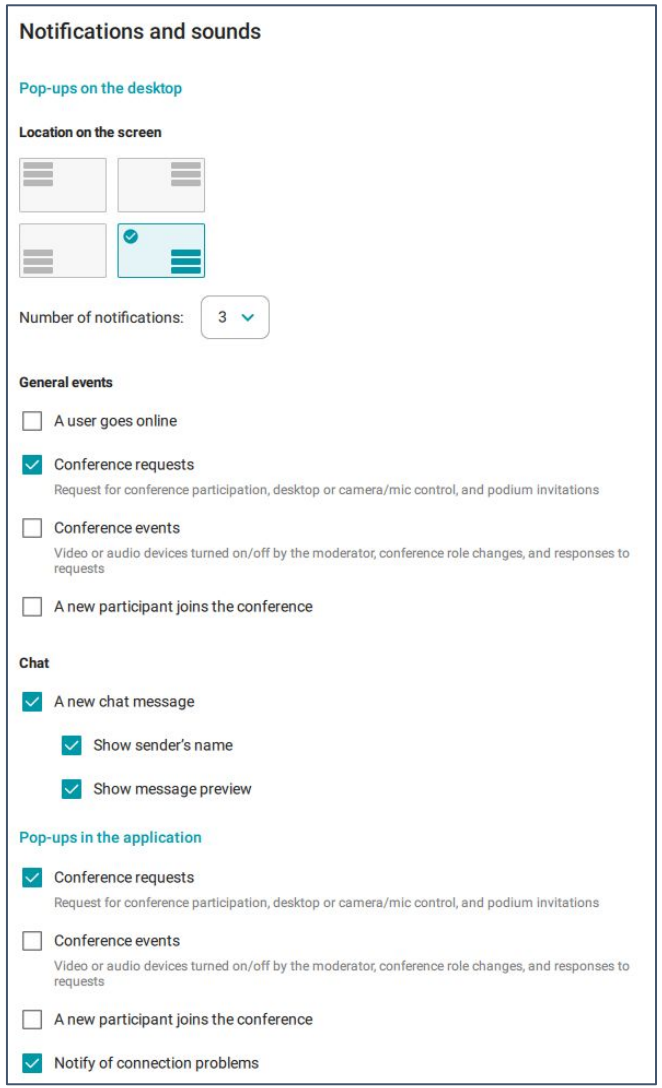
2 To configure camera go to **Audio and Video → Video.** Here, you can set up background blurring or choose a virtual background instead of the real one.. In addition to the default virtual backgrounds, you can add your custom backgrounds. The **Face tracking** checkbox activates an integrated AI module that crops your video so that your face is always centered in the frame. Face tracking is available for cameras with a resolution of 1280x720 (720p) or higher.



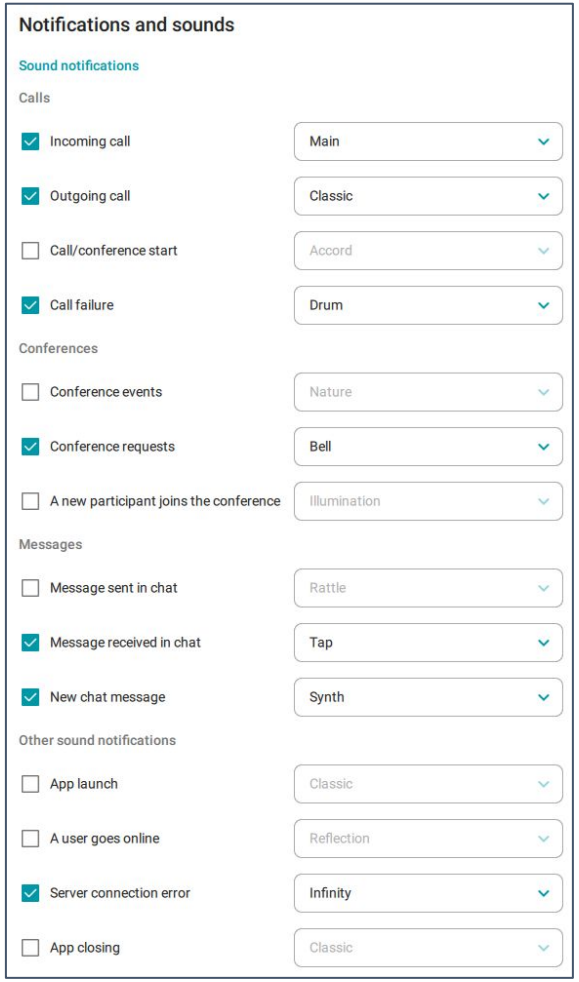
3 To configure audio notifications and pop-ups, go to **Audio and Video → Audio**. Here you can make some other configurations, for example you can activate noise suppression.



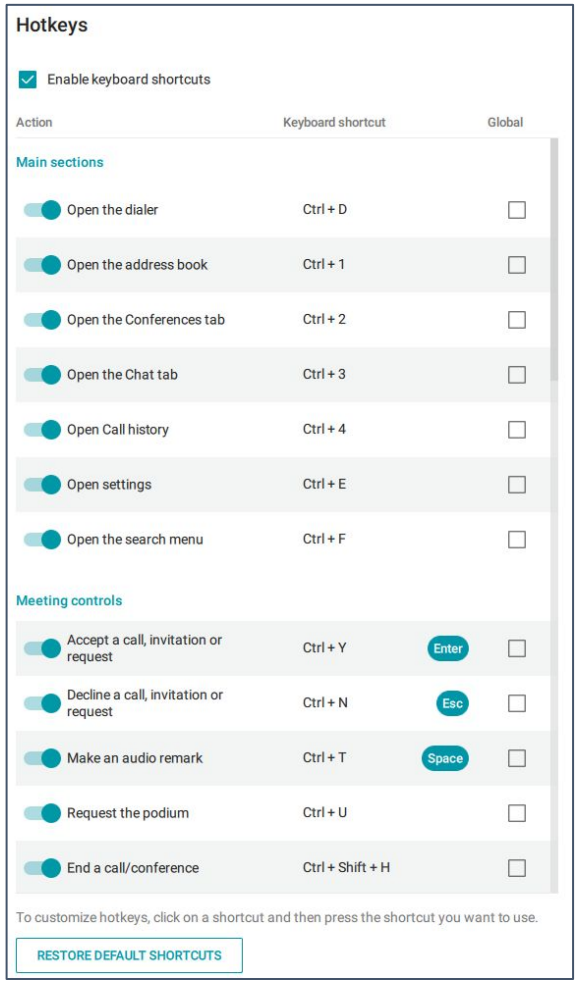
4 In **Preferences → Notifications and sounds** section you can configure pop-ups: their position, events when they will be displayed, etc.



5 Sound notifications are configured in **Preferences → Notifications and sounds.** Here you can select notification sounds for different application events.



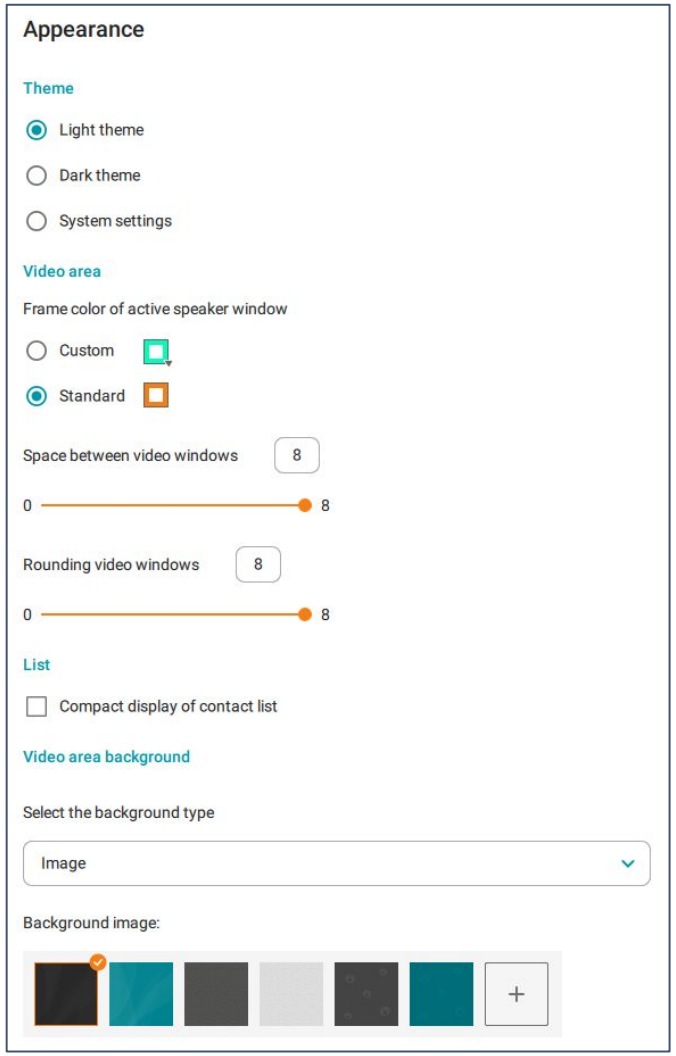
6 To view the list of all available hotkeys, go to the **More → Hotkeys.** Hotkeys can also be remapped. To do it, double-click on a shortcut in the **Keyboard shortcut** column and press the new key combination on your keyboard.

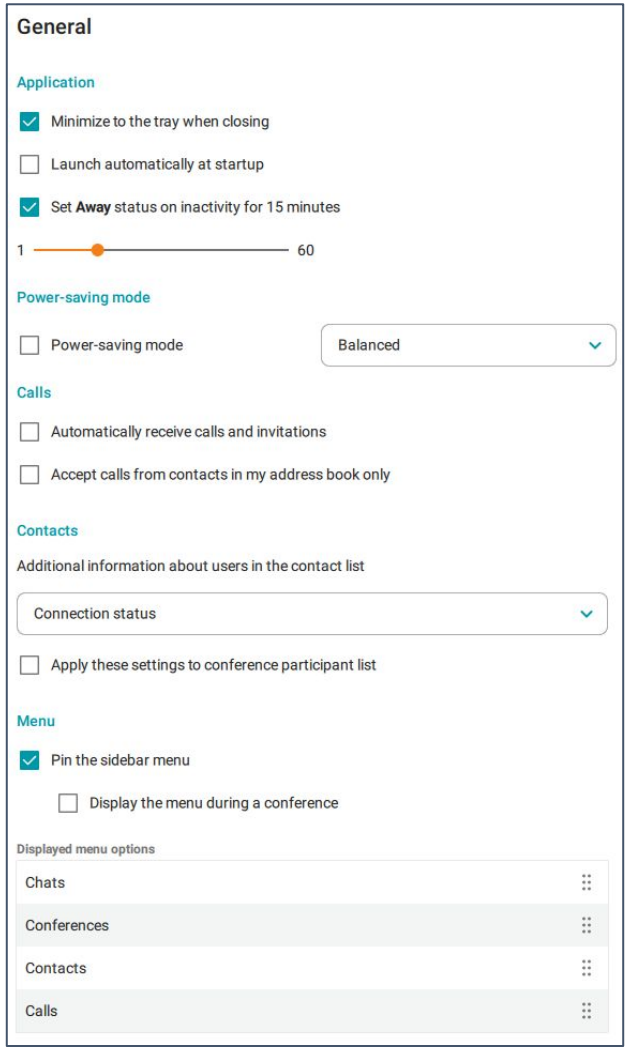


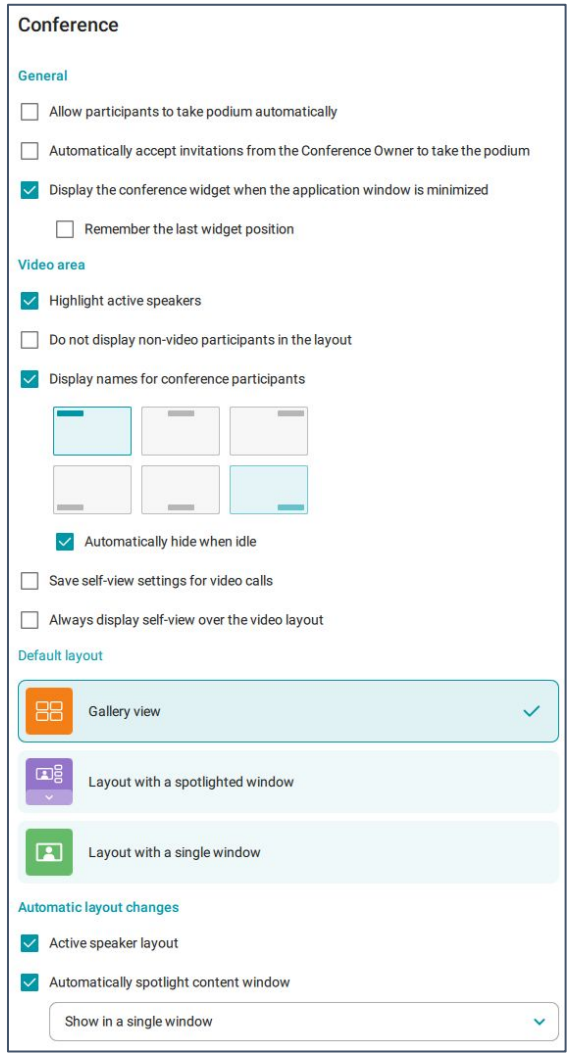
7 To change the application appearance settings, go to **Preferences → Appearance**.

8 To customize preferences, go to **Preferences → General**. In the **Contacts** subsection, you can set a text that will be displayed below a the user's name in the contact list.

9 In the **Preferences → Conference** section you can configure certain conference settings.







Settings of the main menu

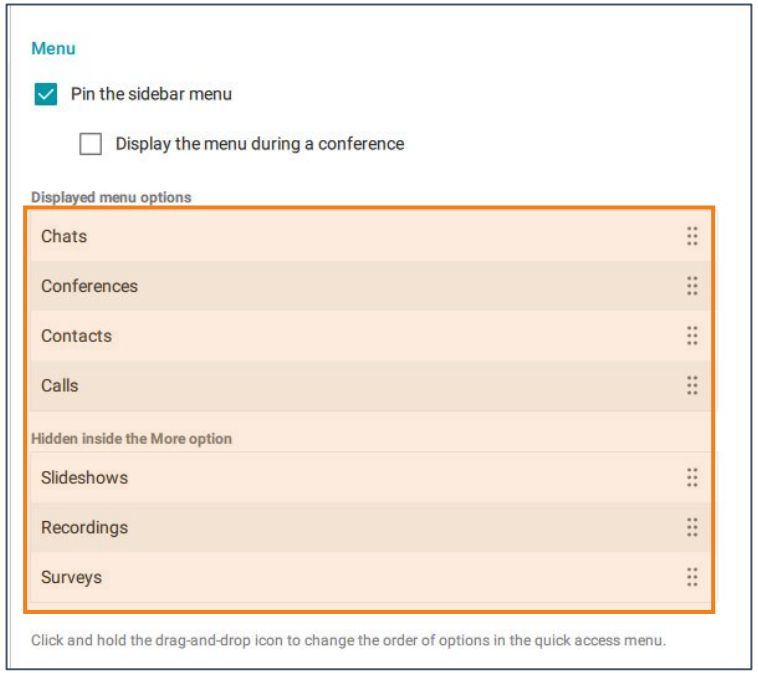
In the **Settings → General → Menu** section, you can customize the main application menu.

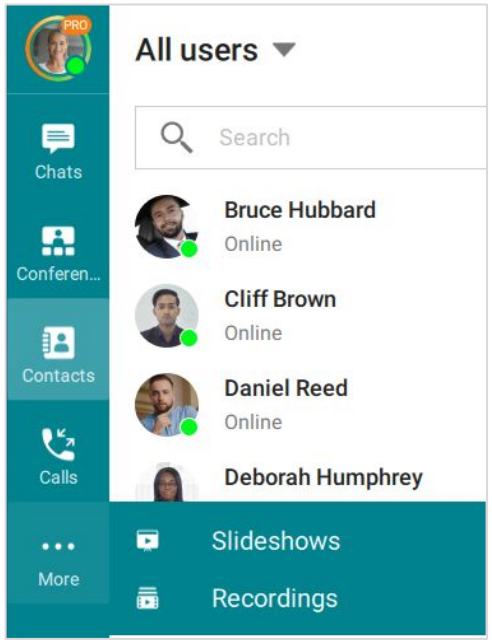
To make sure that the main menu is always displayed in the left part of the application window (except when you are in a meeting or have accessed the settings menu), check the box **Pin the sidebar menu** (checked by default). If the box is unchecked, the menu will be hidden under the button .

In this section you can also change the order of options that are constantly available in the main menu. It is possible to hide additional options by moving them in the **Hidden inside the More option** list. To move an option to the required location, click and hold on the button which is opposite to the option name and drag it.

If you do so, the options from the **Displayed menu options** block will be always displayed in the main menu, while the options from the **Hidden inside the More option** block can be found in the drop-down list that can be opened by clicking on the **More** button.

If the box **Pin the sidebar menu** is unchecked, the menu will include the options from both sections. However, the options from the **Others** block will be displayed below others under the separator bar.



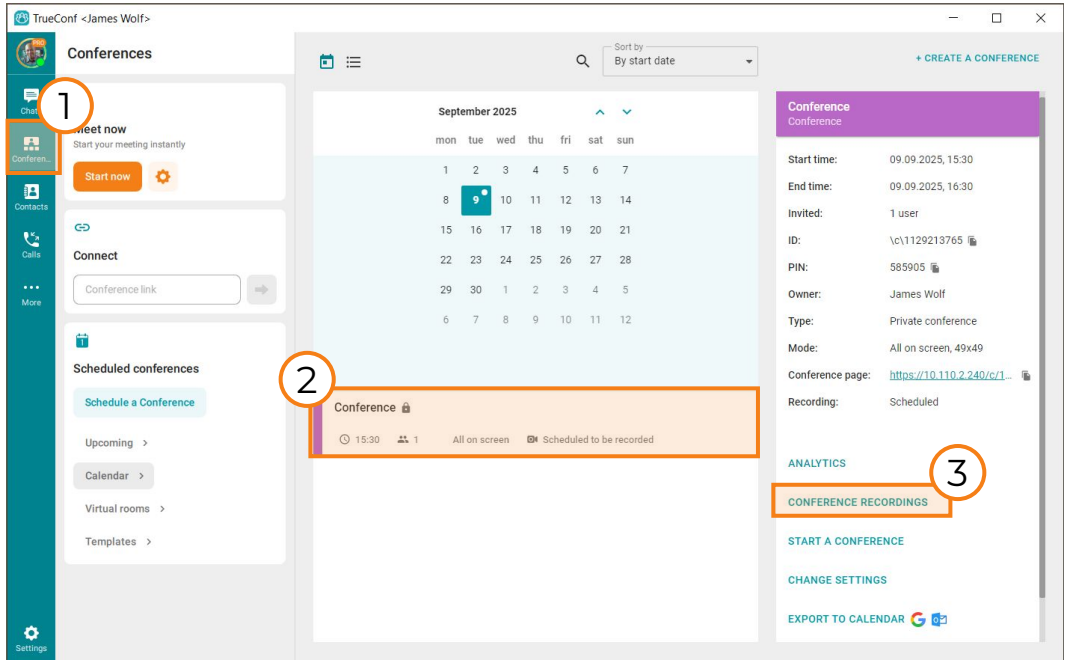


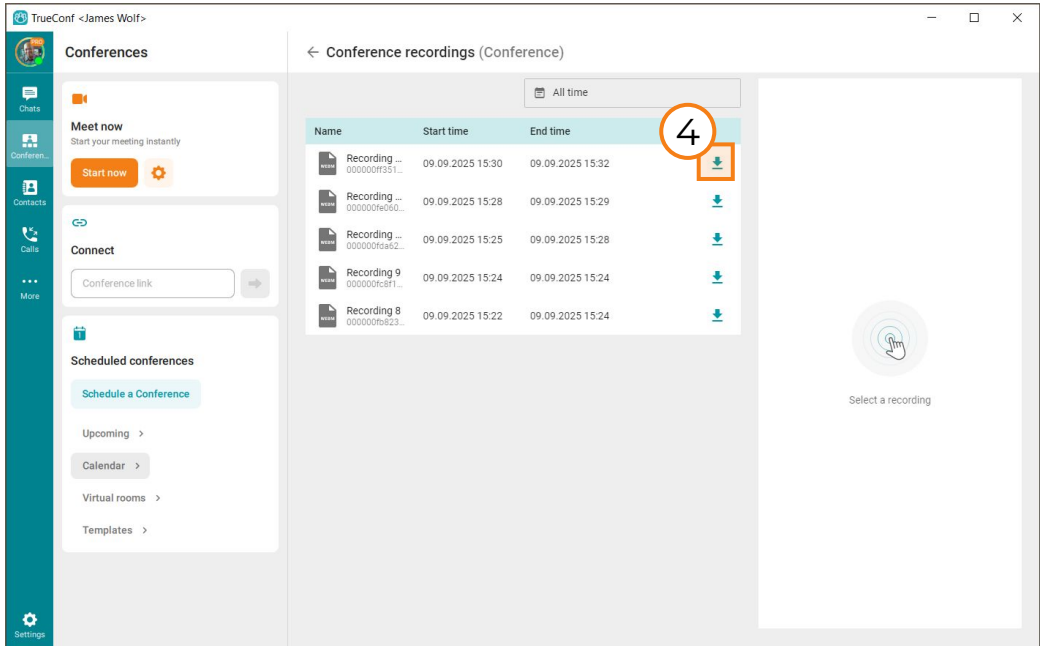
Conference recordings

Downloading automatically created recordings

The administrator can record all conferences hosted on your TrueConf Server. Recording can be activated for all conferences, or be configured only for some of them. In the second case you will need to check the **Enable conference recording** box in the **Recording** section which is in the **Advanced** tab. The recordings created automatically can be downloaded only by the owner. To download a conference recording:

1. Click on the button in the application menu to open the **Conferences** section.
2. Choose a conference whose recording you want to download.
3. In the new menu, click on the **Download recording** button.
4. If there are multiple recordings of a conference, the **Conference recordings** button will be displayed instead of **Download recording**. If you click on this button, you will see the list of available recordings. To download the selected recording, click on the button.





Recording management during a conference

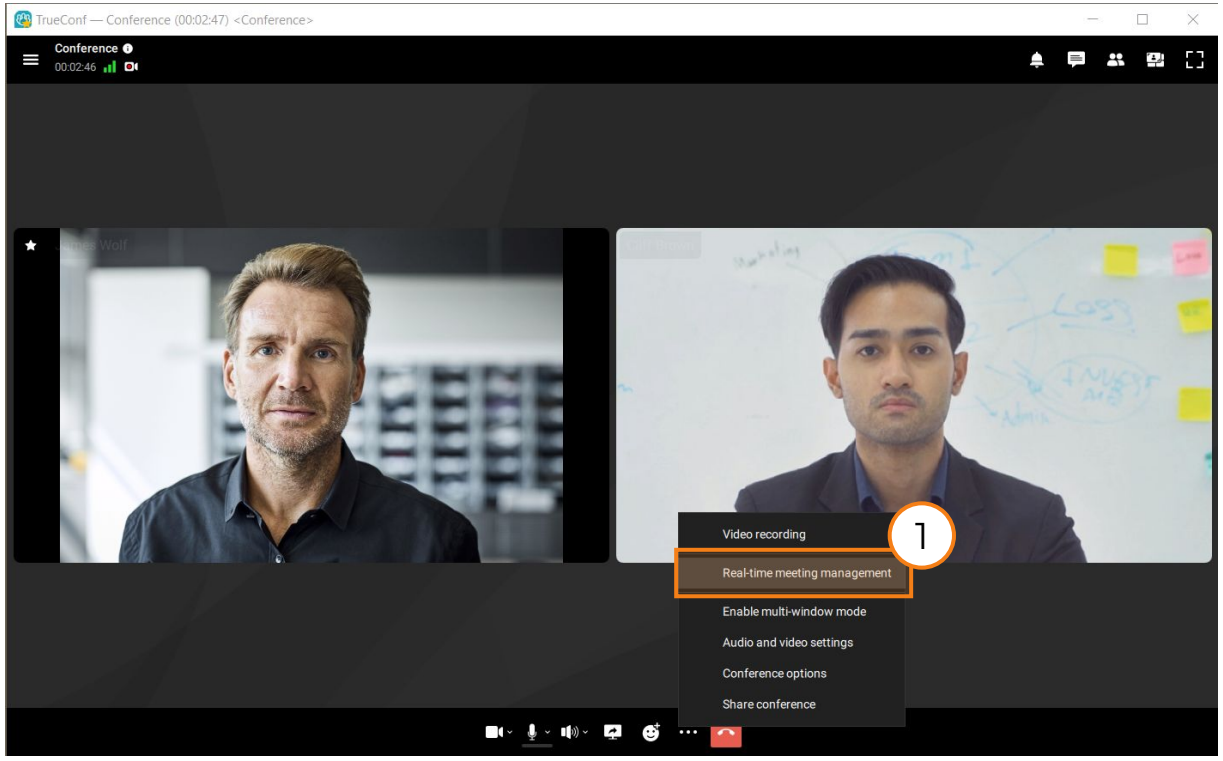
The conference owner can control server-side conference recording. To do it:

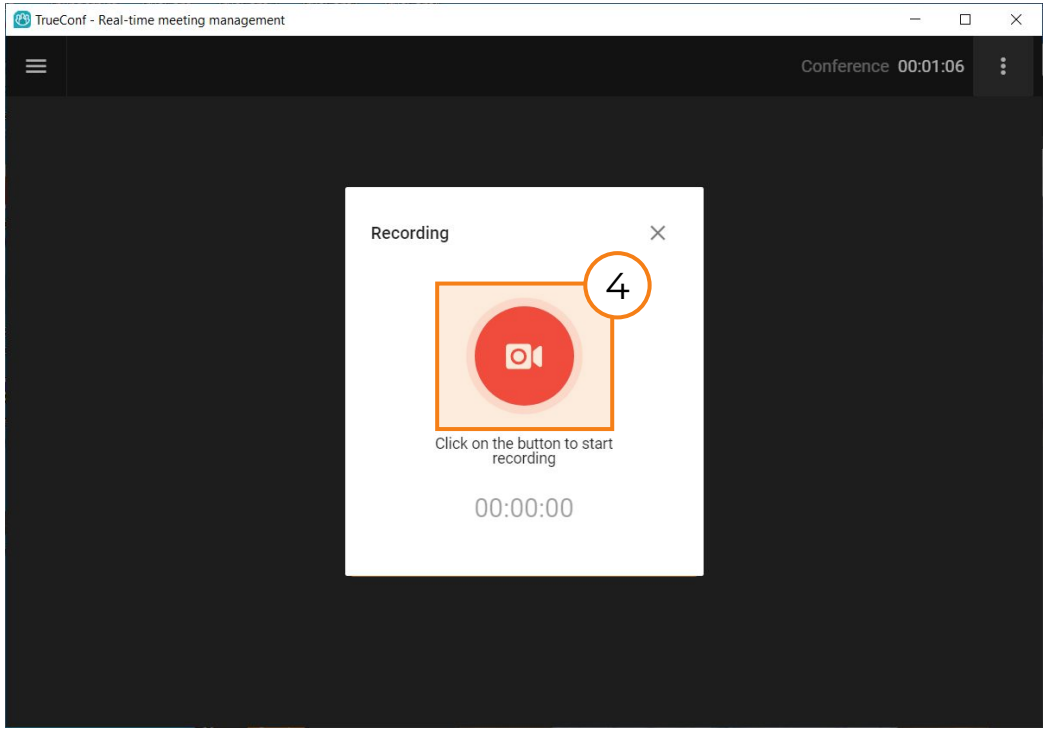
1. Click the ••• button on the conference control panel and select **Real-time meeting management** in the context menu.

2. In the top right corner of the appeared window click on the ⋮ button.

3. Choose **Recording**.

4. Click on the ● to start conference recording. You can stop the recording and save it on server by clicking ■ button. The recording can be downloaded as described in the section **Downloading automatically created recordings**.

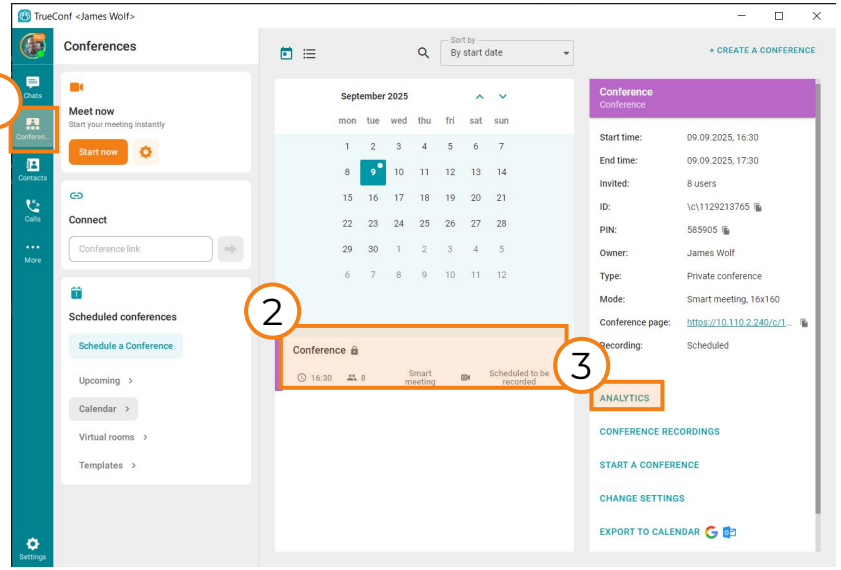


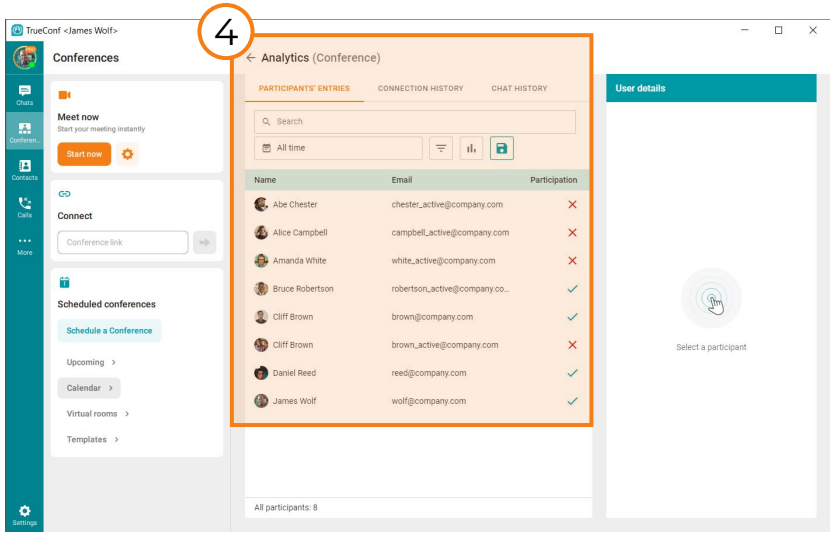


Analytics: extended reports

Viewing the analytics

In the scheduler you can view the detailed information about conference participants and their activity:





1. Click on the to navigate to **Conferences** section.

2. Click on the conference for which you want to check the analytics.

3. Click on the **Analytics** button in the conference card.

4. In the analytics section you can view the following data:

   - Information about participants.
   - Connection history.
   - Messages sent to the common chat.

It is also possible to search within these data and apply filters. If necessary, any list can be saved to a csv file. To do it, click on the button.