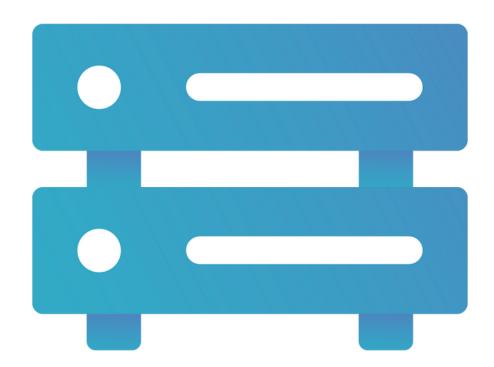


# **TrueConf Server**

User guide



Version 5.4.0

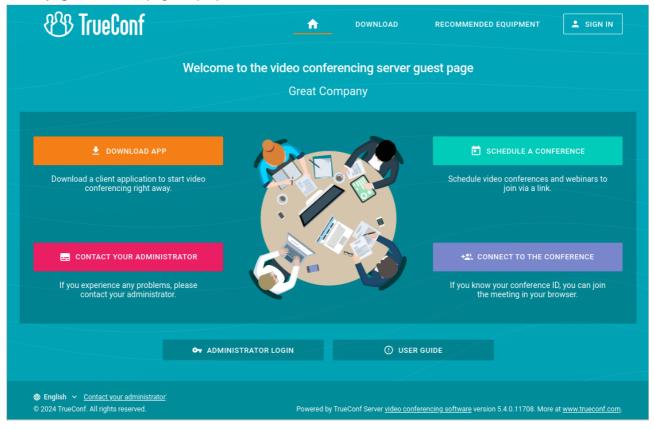
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# 1. What the guest page is

Guest page is the start page displayed to a user connected to TrueConf Server from a browser.



If you are the administrator of TrueConf Server, you will be able to access the control panel from the guest page.

The link to the guest page has the following format: http[s]://<server>[:<port>] . e.g., https://192.168.0.1:443 or https://video.company.com .

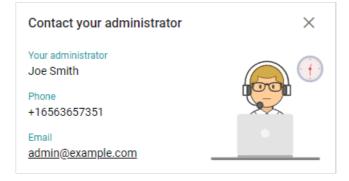
#### 1.1. What can be found on the guest page

On the guest page, you can:

- Sign in to the personal area
- Download TrueConf client apps for popular operating systems
- Schedule a conference (authorization is required)
- Join a meeting with its ID
- View the user guide.

To change the language of the guest page, click on the flag icon which is in the upper left corner next to the logo.

To check the contacts of the server administrator, click the button **Contact your administrator**. You will open the window where one can find the administrator's name, phone number and email.

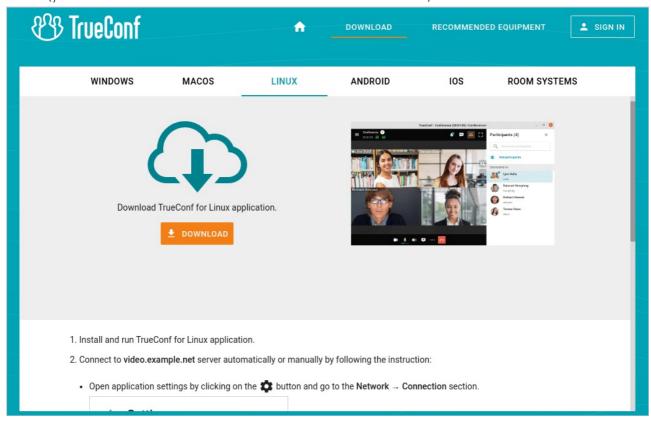


# 2. Connecting to TrueConf Server

To use the video conferencing system, you have to install one of TrueConf client applications on your device.

# 2.1. Where to find client applications

You can download client applications for all supported platforms from the guest page of your TrueConf Server (you can contact the server administrator to find out its address) or from our official website.



# 2.2. Platforms supported by TrueConf client applications

The following platforms are natively supported:

- Windows
- macOS
- Linux
- Android
- Android TV
- iOS
- iPadOS
- WebRTC
- Please note that a WebRTC application is available only to the users who have a link to the conference URL address.

# 2.3. TrueConf client application features



Please note that the features available during a conference depend on your role in this meeting.

Our client applications enable you to:

- Log in as a TrueConf Server user
- Adjust address book settings including the way in which contacts are grouped
- Make calls, create or join conferences
- Collaborate and vote during conferences
- Share your screen or show slides during a conference
- Select video layouts during conferences
- Exchange files and text messages with other users
- View chat and call history
- Select peripherals (e.g. microphone and camera)
- Set personal preferences to customize application settings
- Enable echo cancellation, noise reduction and automatic gain control.

# 2.4. How to connect client applications to TrueConf Server

To connect an application to TrueConf Server, you should specify the server address on the network and sign in. For more information, contact your server administrator.

# 2.5. How to update client applications

TrueConf for Windowsclient applications are embedded into the TrueConf Server installation package and updated automatically when the server is updated. Applications for Linux are available on our web site and in the repository of each operating system. All ways of installing TrueConf applications for Linux are described in the corresponding article in our knowledge base.

To update other client applications, you need to manually download the new version from our web site or get updates from the corresponding marketplace for Android/Android TV/iOS/iPadOS and macOS.

# 3. Call string formats

To make video calls or participate in conferences, you don't have to be a registered user of TrueConf Server. It is also possible to connect from any SIP, H.323 or RTSP endpoint. For each type of supported third-party protocols there is a specific call string format to be used.

It is also possible to invite users by email in which case they will receive an invitation with a link to the conference page.

A call string is a very powerful tool available in TrueConf applications. It can be used to:

- Search for a contact in a client application
- Call a user from a client application
- Save a new contact in the address book
- Add a new participant to a conference
- Create an alias
- And much more

# 3.1. Calling a TrueConf Server user

To call a user from your video conferencing server, enter his/her TrueConf ID as a call string.

- <TrueConf ID> is a user ID
- <server> is an IP address or a domain name of a TrueConf Server instance.

# 3.2. Connecting to a conference

If you have a link to the conference page, the easiest way of joining the conference is to use TrueConf client application: just paste the link into the search field and click the call button.

It is also possible to use a call string in the following format:

- \c\<CID> if the conference is being hosted on your video conferencing server, where:
  - <CID> conference ID
- \c\<CID>@<server>#vcs if the conference is being hosted on a different TrueConf Server instance federated with your own server. In this case:

  - <server> is the DNS name of the server hosting the conference.

#### 3.3. Calling SIP endpoints

Use one of the following formats to call an SIP endpoint:

- #sip:<user id>@<server name> , where:
  - <server name> is a host name or IPv4 address of an SIP server
  - o <user id> is an SIP username.
- #sip:<user id>@[<server name>] , where:
  - o <server\_name> is the IPv6 address of an SIP server;
  - o <user\_id> is an SIP username.

- #sip:<user id>, where:
  - o <user id> is an SIP username
- #sip:@<endpoint ip>, where:
  - <endpoint ip> is the IPv4 address of an SIP endpoint.
- #sip:@[<endpoint ip>], where:
  - <endpoint ip> is the IPv6 address of an SIP endpoint.
- #sip:@<hostname> , where:
  - <hostname> is the DNS name of an SIP endpoint.
- #tel:<number>, where:
  - o <number> is an SIP username.



You can also call the number <number> using the dialer.

If the SIP server IP address or name is provided, you may have to specify the following parameters explicitly:

- Connection port <port> (in case it is different from the standard **5060** port)
- Transport protocol <protocol> used for sending media streams (UDP is selected by default).

Call string examples for SIP protocol:

- #sip:james78@sip.company.com
- #sip:james78@sip.company.com:5070
- #sip:james78@sip.company.com:5070;transport=tcp
- #sip:james78
- #sip:8001
- #sip:@192.168.1.99
- #sip:@192.168.1.99;transport=tcp
- #sip:@[fe80::805a:1cf9:12f9:def7]
- #tel:501
- #tel:13478783263

### 3.4. Calling mobile phones and landlines

You can call a phone number using the dialer in the address book. For more information about this feature, please read the TrueConf client applications user guide.

#### 3.5. Calling H.323 endpoints

Use the following call string formats for calling an H.323 endpoint:

- #h323:@<IP> , where:
  - <IP> is the IP address of an H.323 gatekeeper.
- #h323:@[<IP>] , where:
  - <IP> is the IPv6 address of an H.323 gatekeeper

- #h323:<user id>@<IP> , where:
  - <IP> is the IP address of an H.323 gatekeeper or an MCU
  - o <user\_id> is an ID of a user or a device registered on an H.323 gatekeeper with an IP address specified in <IP> parameter.
- #h323:<user id>@[<IP>] , where:
  - <IP> is the IPv6 address of an H.323 gatekeeper or an MCU
  - <user\_id> is an ID of a user or a device registered on an H.323 gatekeeper with an IP address specified in <IP> parameter.
- #h323:\e\<e164 id>@<IP>, where:
  - <IP> is the IP address of an H.323 gatekeeper or an MCU
  - <e164\_id> is an E.164 format number of a user or device registered on an H.323 gatekeeper with
     an IP address specified in <IP> parameter.
- #h323:<user id>@<IP> , where:
  - <IP> is the IP address of an H.323 gatekeeper.
- #h323:\e\<e164 id>@<IP>, where:
  - <e164 id> is an E.164 format number of an H.323 gatekeeper.

If the IP address of the H.323 gatekeeper or MCU is included, it may be necessary to specify the connection port <port> in an explicit way (when this port is different from the standard 1720 port). In this case it has to be specified after the IP address in the following way:

```
#h323:<user id>@<IP>:<port>
```

Call string examples for H.323 protocol:

- #h323:@192.168.1.99
- #h323:@192.168.1.99:1730
- #h323:hdx8000@192.168.1.99
- #h323:@[fe80::805a:1cf9:12f9:def7]
- #h323:james78
- #h323:\e\8001

### 3.6. Calling RTSP endpoints

To display an RTSP stream in the layout, add the video source as a participant to a group conference or a point-to-point call using the RTSP call string. In this way, you can access the video from an IP camera or another conference streamed over RTSP. The call string format may differ depending on the vendor or camera model. You need to check the call string format specifically for your device.

Examples of RTSP addresses for different cameras:

- rtsp://192.168.1.100/axis-media/media.amp
- rtsp://admin:12345scw@192.168.1.100:554/cam/realmonitor?channel=1&subtype=1
- rtsp://admin:12345@192.168.1.100:554/Streaming/Channels/101

An example of an RTSP link for a TrueConf conference for which streaming has been enabled:

rtsp://video.server.com/c/webinar/

# 3.7. Calling external users by email

If you do not know a user's login (TrueConf ID) in the TrueConf video conferencing system and this person is not in your address book, you can call him/her by the email address. To do it, enter the call string with the prefix #mailto:, for example, #mailto:user123@example.com in the address book of your TrueConf application.

Similarly, the format #mailto:user123@example.com can be used to invite a user to a conference in the participant list menu of a client application.

# 3.8. Using tone dialing

You can send DTMF commands to DTMF-compatible devices in RTP EVENT and SIP INFO modes. To learn more about the transmission of such signals, please read the documentation provided by the manufacturer for each device.

The following symbols can be used to add pauses directly to the call string:

- , short pause (a few seconds)
- ; long pause (waiting for a dial tone from the caller).

For example, if you want to call a SIP server with IP 192.168.1.99 from the TrueConf client application to a conference protected by PIN 123456, you can avoid manual PIN entry by using a URI with a preset:

```
#sip:@192.168.1.99;123456
```

To call 13478783263 with extension 222, you can use the following call line:

#tel:13478783263,222

# 4. Calls to TrueConf Server via SIP/H.323

# 4.1. Connecting to a conference

To make a call from a hardware or software SIP/H.323 endpoint (including TrueConf Group or TrueConf Videobar) to a conference hosted on TrueConf Server, use a call string in one of the following formats:

- 00<Conference ID>@<server>
- 00<Conference ID>@<server>:<port>

#### where:

- <Conference ID> conference ID
- <server> the server domain name or IP address
- <port> the connection port (used if the port is different from standard 5060 for SIP and 1720 for H.323).

#### For example:

```
001949195144@video.company.com
001949195144@video.company.com:1730
```

To join a **PIN-protected conference** from an SIP endpoint, it is necessary to add PIN, separated by a comma after the conference ID in the call string:

```
00<conf id>,pin@<trueconf server>:<port>
```

#### 4.2. Call to a TrueConf Server user

To make a call from the endpoint to a user registered on TrueConf Server use one of the following formats:

- <TrueConf ID>@<server>
- <TrueConf ID>@<server>:<port>

#### where:

- <TrueConf ID> user TrueConf ID
- <server> IP address or domain name of the server where the call should be routed
- <port> the connection port (used if the port is different from standard 5060 for SIP and 1720 for H.323).

#### For example:

```
james78@video.company.com
james78@video.company.com:5070
```

#### 4.3. Additional features

Additionally, to make a call via SIP, you can explicitly specify the protocol name (UDP is used by default):

```
00<conf_id>,pin@<trueconf_server>:<port>;transport=col>
```

Some H.323 endpoints like Cisco also support call strings with double hashes ## . In this case TrueConf users and conferences can be called in this way:

```
<trueconf_server>##00<user>
<trueconf_server>##00<conf_id>
```

# 5. Personal area

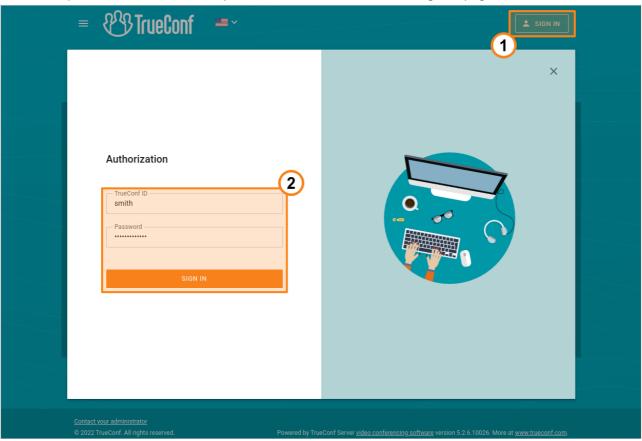
**Personal area** is a server-hosted web page designed for scheduling conferences or editing personal data or the address book.

Unlike the control panel which is accessible only to the administrator, this web page is available to every user.

### 5.1. How to sign in

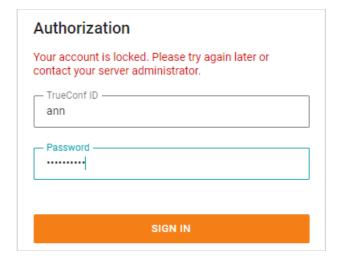
On the server guest page, click the **Sign in** button in the upper right corner. Enter your username and password.

You can request the administrator to provide access credentials for the guest page.



The account lockout policy can be configured on the side of TrueConf Server for the cases when invalid login is entered.

Authentication in the client application and in the personal area can be blocked after multiple failed attempts to enter the password. The maximum number of failed attempts and the lockout period will be determined by the administrator. If you want your user account to be unlocked manually before the lockout period expires, please contact the server administrator.



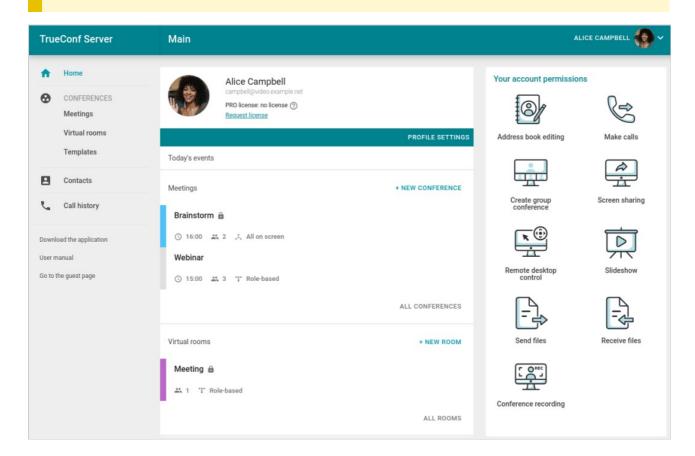
# 5.2. Main page

Once you have signed in, you will see a list of conferences scheduled for today and virtual rooms (up to 5) below on the main page.

In the personal area, you can see only the conferences in which you are involved as a participant/owner.

i

This list does not include the meetings created ad hoc in TrueConf client applications, for example, in the **Conferences →Meet now** section of TrueConf for Windows.

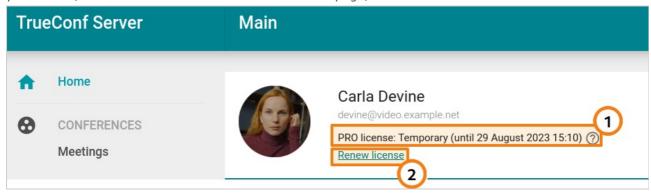


#### 5.3. License information

Participation in conferences hosted on your server is determined by separate **PRO licenses**. If you do not have such a license, you will not be able to join an event as a participant, owner or moderator.

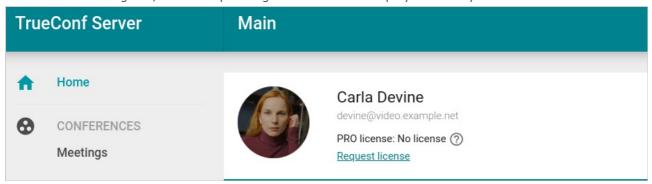
Information about your PRO license will be displayed on the main page of the personal area right below

your name (and in the notification at the bottom of the page):



- 1. License information:
  - If you have a **permanent PRO license**, in addition to the title, you will also see the help button with additional information.
  - If you have a **temporary PRO license**, you will see its expiry period and the help button with additional information.
- 2. Renew a temporary license manually for 24 hours.

If the license is not given, the corresponding text hint will be displayed below your name:



The administrator of your TrueConf Server can disable the display of information about the PRO license and make it impossible for users to renew such licenses manually. This means that the administrator fully controls the distribution of licenses and if you are unable to participate in a conference due to some reason, contact the administrator.

#### 5.4. List of conferences

The full lists of conferences are displayed in the Meetings and Virtual rooms sections.

Click on a conference to check its details. The sidebar on the right will include general information about the meeting and control buttons. You can export a scheduled conference to your Google Calendar, Outlook, etc.

In the card of the selected conference, you can find:

- Number of invited participants
- Conference ID
- PIN code (if it was set)
- Owner
- Access type (private or public)
- Mode

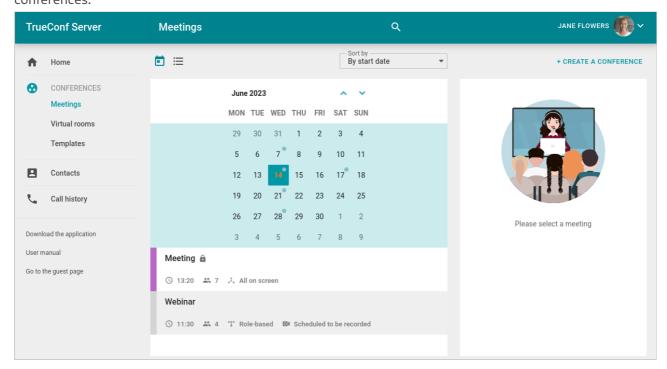
- Location (if specified)
- Information about the current access status (displayed if the meeting is now locked)
- Conference URL
- A text hint indicating that the video recording of this conference will be saved on the server (displayed only if recording was enabled when the conference was scheduled).

Calendar is displayed above the list of conferences in the **Meetings** section. Select a date to see a list of conferences scheduled for that day.



Conferences scheduled for today are displayed on the main page.

Use and buttons at the top to switch between the calendar and the list of all scheduled conferences:



# 5.5. Profile settings

Go to **Profile settings** to change your account information and interface language.

Click Make a photo button to create an avatar using a webcam.



You may need to give the browser access to your webcam to take a photo.

Changing the language is available on **Other settings** tab.

#### 5.6. Address book

Go to the **Contacts** section to view and edit the address book.

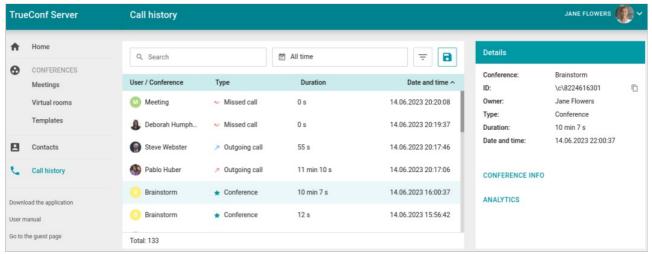
You can select any contact to call or start chatting. To contact a user, you will need a client application which can be downloaded by clicking the **Download the application** link in the personal area menu.



You will be able to edit the address book only if this right is given to you by the administrator.

# 5.7. Call history

You can view the history of incoming or outgoing calls, including conference invitations. Go to the **Call history** section of the personal area. If you select a meeting from the list, the main information about this event will be displayed. In case you are the owner of the selected conference, you will be able to access the card providing more detailed information about it:



# 6. Features available to your account

On the right panel of the personal area main page, you can find the list of features available to you:

- Address book editing
- Make calls
- Create group conference
- Screen sharing
- Remote desktop control
- Slideshow
- Send files
- Receive files
- Conference recording
- Operator rights.

rights given to you.

# 6.1. Address book editing

**Address book** is a list of contacts (both user accounts and call strings) that a TrueConf Server user can view and browse from a client application.

If any of these features is unavailable to you, contact the server administrator and ask for a list of

If this feature is unavailable, you will only be able to see the address book provided by the server administrator without being able to edit it.

#### 6.2. Make calls (video calls)

A video call is a mode involving two participants who can see and hear each other.

If this feature is unavailable, you won't be able to make video calls but, only receive incoming calls.

#### 6.3. Create group conference

If this option is unavailable, you will be able only to join conferences, but not create them.

You can create group conferences in one of the four modes with TrueConf client applications and in the personal area:

- All on screen is a video conference where all participants can see and hear each other.
- **Video lecture** is a conference where the moderator can see all the participants while the participants can only see the moderator.
- Moderated role-based conference is a conference where participants can see and hear only presenters. Any participant can become a presenter; to do it, he/she has to be approved by the moderator.
- Smart meeting is similar to a moderated role-based conference; however, in this case, every participant automatically becomes a presenter as soon as he/she starts speaking or sharing content.

#### 6.4. Screen sharing

This right enables you to share your desktop and separate application windows in TrueConf client application. This feature does not affect the ability to view the content shared by other participants.

# 6.5. Remote desktop control

If this feature is available, any participant in a conference or video call can control your desktop if you have allowed it in application settings. Please note that the remote control can be requested only if you are sharing your desktop (not one of application windows or a slideshow).

#### 6.6. Slideshow

This right enables you to show slides in TrueConf client application. If this feature is disabled, you will still be able to view the slides shown by other participants.

#### 6.7. Send files

If you do not have this right, you will not be able to send files to personal or group chats. However, you will still be able to send messages, share contacts or download the files sent by other users.

#### 6.8. Receive files

This right allows you to receive files in private and group chats. If you do not have this right, instead of a file there will be a chat message indicating that you are not permitted to receive files. However, you will still be able to download the files that you sent previously providing that you have the permission to send them.

# 6.9. Conference recording

This feature enables you to record calls and conferences in TrueConf client application. This feature does not affect the right to record video meetings on the server side.

# 6.10. Operator rights

This right means that your account was added to the **operator** group which gives you the following permissions:

- You automatically receive the rights of a **moderator** in any conference you join.
- None of the participants, including the conference owner, can dismiss you from the moderator role.
- You can join any PIN-protected meeting without having to enter PIN, regardless of when this passcode was set, before the conference start or during the conference.

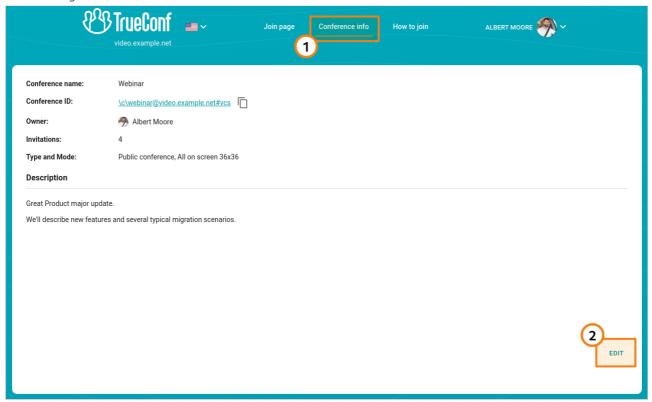
**Moderator** is a conference participant who is allowed to:

- Invite users to a conference
- Remove users from a conference
- Give or take the "podium" without a request (in a moderated role-based conference)
- Pin presenters on the "podium" (in a smart meeting)
- End a conference for all participants
- Set up video window layouts for participants and control their audio and video devices.

# 7. Conference page

Every conference, created on TrueConf Server has a web page. Its user interface may differ depending on the conference schedule and privacy mode.

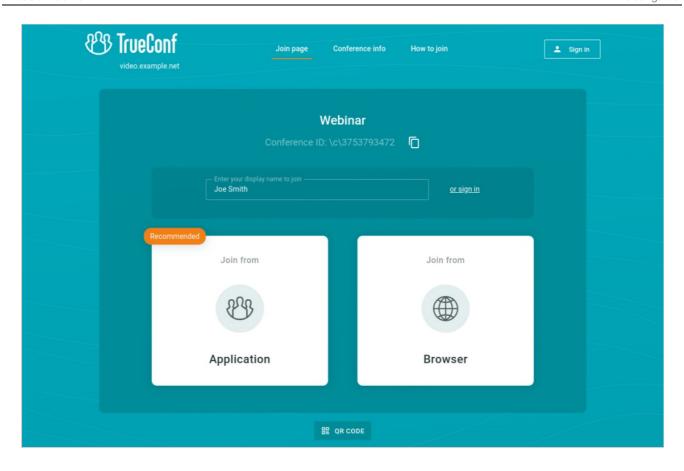
The conference owner will be able to make use of additional features on the conference page. If the event has not started yet, the owner will be able to edit the description by going to the **Conference info** section and clicking **Edit**:



We recommend using a client application (for example, for desktop operating systems) as a tool for joining a conference instead of a browser because it offers more features for both attendees (custom video layout, more functional chats, etc.) and moderators (device management, access to scheduler and real-time meeting management, etc.).

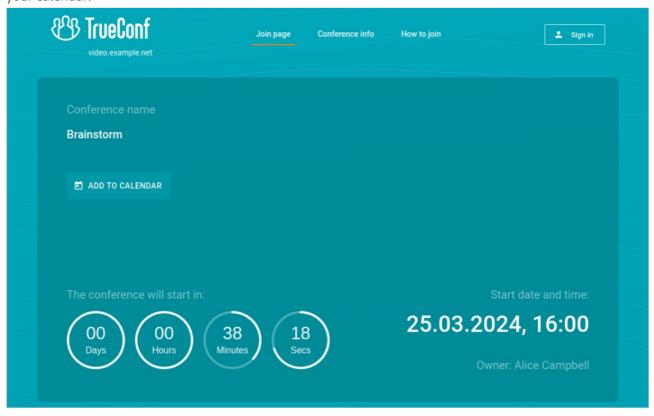
# 7.1. A virtual room or a scheduled conference that has already been started

If it is a virtual room or a scheduled conference that has already been started, you will see the buttons allowing you to join the meeting either from TrueConf client application or from the browser. If it is a webinar, you will be able to join as a guest; in this case, you will need to enter your name in the corresponding field:



# 7.2. Scheduled conference without registration

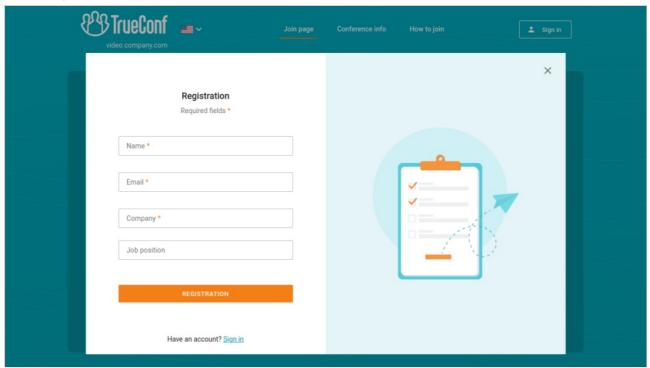
In this case you will see the general information about the webinar and the button for adding this event to your calendar:



If the conference has already been started, you will be able to join it either with your TrueConf Server account or as a guest (available for a webinar) as it is shown above.

# 7.3. Scheduled conference with open registration

The registration is available only for public conferences. In this case, you will see the **Sign up** button. If you click on it, you will be asked to fill out the registration form (required fields will be marked with an "asterisk"):



If email invitations were allowed on TrueConf Server, you will receive a connection link that will be sent to the email you provided when filling out the form. Otherwise, you will need to click on the **Copy link** button to copy and save the conference join link.

The conference join link is unique; it cannot be shared with any other participant or used for joining a meeting from multiple devices. For example, you will be disconnected from the conference you joined on your computer if you also try to join this event from your mobile phone.

Authenticated TrueConf Server users can be allowed to join the conference when configuring registration settings. In this case a user can add oneself to the list of webinar participants in the following way:

- 1. Authenticate on the conference page by clicking on these buttons: **Sign in →Enter as a registered user**.
- 2. Click on Attend.
- \* Check out the article in our knowledge base to learn more about different ways of joining a conference.

# 8. Conference scheduling



You will be able to create conferences only if this right is given to you by the administrator.

To create a conference on the main page of the personal area, click **New conference** or **New room**.

Please select a conference type:

- Private (by default) only registered users can join the meeting;
- Public (webinar) both registered and unregistered users can join.

If your event will be joined by participants, who speak different languages, and their discussion will be supported by simultaneous interpreters, check the **Language interpretation mode** box. The language interpretation mode must be activated in advance; it cannot be configured when the conference has already been created. Additionally, the activation of this feature will automatically set the conference mode to *moderated role-based conference* because language interpretation is possible only in this mode. When recording a conference assisted by interpreters, several audio tracks will be created: the main track and a separate track for each language into which the translation was made. For more information on setting up language interpretation, read the description of the relevant tab.

The launch mode will be set automatically. Click **Continue** or select a template to go to the main settings.

#### 8.1. "General" tab

Specify:

- Conference name
- Mode (All on screen mode is set by default)
- Specify the number of presenters if a moderated role-based conference or smart meeting is selected
- Conference start type: scheduled or unscheduled (virtual room)
- For a scheduled conference, you can:
  - o select the start date and time, and, if necessary, configure recurrence (repetition) settings
  - enable alerts about impending conference ending and, if necessary, allow moderators to extend the meeting for the selected period of time. Such notifications will be displayed in the real-time meeting management section both in the application and the personal area.
  - send automatic email reminders to conference participants. This feature will be available if it was
    previously activated in the settings of TrueConf Server by the administrator. It is possible to add up to
    4 reminders for one conference. To do it, click on the Settings button. If you want to apply the
    notifications settings specified on the video conferencing server, click the button Use administrator
    specified settings.



Sometimes when editing a conference created previously, you will see the reminders that you did not add. This issue may occur because the administrator of TrueConf Server activated global notifications settings when the conference had already been created.

Check the Save as template box to create conferences with the same settings in one click in the future.

#### 8.2. "Participants" tab

Go to the Participants tab and add users to a conference in one of the following ways:

- From the address book
- By their TrueConf ID

- By specifying a call string for an SIP/H.323 or RTSP device
- By email (only for public conferences).

You can immediately appoint one of the invited attendees as meeting moderator. To do it, select a participant, click the button with three dots and choose the option **Assign as a moderator**.

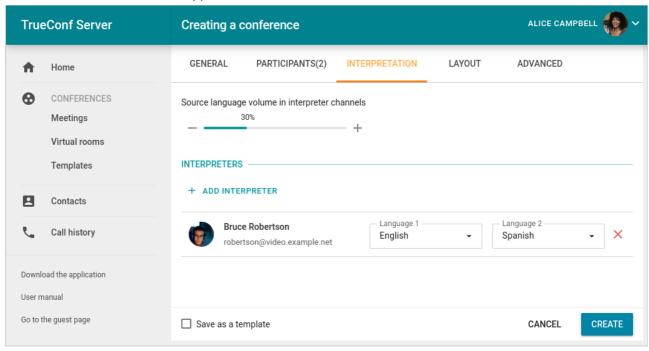
#### 8.3. "Interpretation" tab



This tab will be available only if simultaneous interpretation mode was enabled when the conference was created.

TrueConf Server supports conferences where simultaneous interpreters can be invited. This feature enables participants, who speak different languages, to take full part in the discussion without missing any important details. Each attendee can select a language in a client application or in a browser (depending on the connection method) to listen to the speaker's presentation. The number of interpreters is limited only by the number of participants.

Simultaneous interpreters are selected from among invited participants of a conference. Just click the **Add interpreter** button and choose which language they will be translating to and from. In the example below, the pair **English - Spanish** is selected. During the event, the interpreter will be able to change the direction of translation in the TrueConf application:



An interpreter cannot be added to the video layout in the conference settings or in the real-time meeting management when the event has already started. In this way, you can select multiple interpreters, even for the same language pair (for example, so that one can rest while the other works with these languages).

At any given time, only one person can translate from one language to another. For instance, only one user will be able to translate from English to Hindi; however, the second interpreter will be able to translate from Hindi to English.

In interpreter channels participants will be able to hear the original presentation: its volume level will be set at 30 % by default. However, you will be able to reduce the volume level to 0 % (i.e. mute it).

#### 8.4. "Layout" tab





We recommend that you first review the <u>relevant section</u> to learn how parametric video layouts work in TrueConf.

On the **Layout** tab, you can select the default layout for all conference participants (including groups of participants depending on the connection type) or for each user individually.

To set a layout:

- 1. Specify the type of layout.
- 2. Select the number of video windows.
- 3. Choose where the username should be located (at the top or bottom of a video window)
- 4. If needed, check the box **Lock the layout**, so that participants cannot change the layout displayed to them and have to adopt your version.
- 5. Select the type of each video window or click the **Fill layout** button to allocate participants to video windows automatically (you will be able to re-arrange windows with the mouse). By clicking the button
  - you can switch to full-screen mode which is more convenient for layout configuration.

#### 8.5. "Additional" tab

Set up the following parameters on the **Additional** tab:

- Conference ID
- PIN to join the conference. This will boost your meeting security and protect your conference from third-party access (even if a third party has a conference join URL in case you organize a webinar). PIN will be generated automatically upon checking the box. However, you can always change the PIN in the field below. PIN protection will be unavailable if you allow users to sign up for a public conference (webinar).
- Connecting to the conference without invitation (for private conferences only)
- Waiting room for the event. You will be able to choose the participants who will be directed to this room (see below)
- Settings for automatically turning off participants' cameras and microphones when they join the conference
- Permissions for guest participants (available only for a public conference)
- Restriction on the number of guest participants (available only for public conferences); by default, unauthorized users can join the event up until the moment when the licence limit for guest connections is reached
- Conference recording (available only if the administrator of your TrueConf Server had previously enabled this feature)
- Sending email invitations to participants
- Conference location and description.

### 8.5.1. Selection of the participants who will be moved to the waiting room



It is not possible to select the participants who will be directed to the waiting room, if registration is allowed for a public conference (webinar). In such a case all participants except the owner and moderators will be directed to the waiting room if it is enabled.

Under any scenario, SIP/H.323/RTSP connections are treated as participants from other servers. For example, if an endpoint makes a call to a conference or is invited to the meeting, it will be directed to the waiting room if all the settings are activated except **Guests only** for a webinar.

#### Categories that can be selected for public conferences

 All participants (except the owner and moderators) — all participants except the owner and moderators will be moved to the waiting room (this includes the participants who signed up for the event)

- **Uninvited participants and guests** (selected by default) the following participants will be *moved* to the waiting room:
  - all users from your server, who were *not invited in advance* before the start of the conference and are now calling the conference/owner or are invited after the start of the event
  - o all users from a federated server who were *not invited in advance* before the start of the conference
  - o all quests.
    - The following participants *will not be moved* to the waiting room:
  - o users from your server who were invited in advance before the start of the conference
  - o users from a federated server who were invited in advance before the start of the conference
  - users who signed up for the event (since they have already been added to the list of invited participants)
  - users from your server and federated server who were *invited in advance*, but did not join when the conference started and are now trying to join during a conference or receive another invitation call.
- Uninvited participants from other servers and guests only guests (if they did not sign up for the event) and users from a federated server, who were not *invited in advance*, will be directed to the waiting room.
- Guests only only guests, if they did not sign up for the event, will be directed to the waiting room.

*Categories that can be selected for private conferences* (the rules are similar to the ones set for webinars except guests and unregistered participants):

- All participants (except the owner and moderators)
- Uninvited participants (selected by default)
- Uninvited participants from other servers.

#### 8.6. "Registration" tab

If a public conference (webinar) is created, the **Registration** tab will be available (this feature will can be accessed if you are scheduling a conference and not creating it ad hoc). Here, you can configure registration settings so that users could sign up as guests for the online event:

- 1. Enable registration (disabled by default)
- 2. Select the time when registration will close:
- 3. Without limitation available only for recurring conferences (the registration will always be open)
- 4. **At conference start** the registration will close right after the webinar start
- 5. At conference end the registration will remain open up until the webinar end
- 6. Custom date and time set a custom time interval during which the registration will be open.
- 3. Automatically close the webinar registration when the maximum number of participants is reached (depends on the selected conference mode).
- 4. Allow any authorized user to join the conference after its start. In this case, any user registered on your server can sign in on the conference page and add oneself to the list of invited participants by clicking on the **Attend** button.
- 5. Settings for the input fields in the registration form. You can drag and drop input fields to create a custom registration form. Besides, you can mark the corresponding checkboxes to make sure that certain

fields must be filled by participants. The customization of registration form is available only when a conference is created. This feature is not available when the conference is edited.

6. It is possible to select the input fields for the registration form only when a conference is created. You can choose either standard fields or add custom ones (up to 10) by clicking on the **Add field** button.

When the changes are saved, users will be able to sign up for a public conference on its web page.

# 8.7. Templates

To create meetings with multiple identical parameters, you can use templates. When a conference is created based on a template, all schedule settings are discarded (it becomes a virtual room by default). However, the following parameters remain unchanged:

- Conference name, mode, and owner
- List of participants
- Parameters from the **Additional** tab (except conference ID)
- All registration settings saved in the template, except the time when participant registration will be closed: these parameters will be available for a scheduled public conference (webinar).



Set up a schedule on the General tab to hold the same conference on a regular basis.

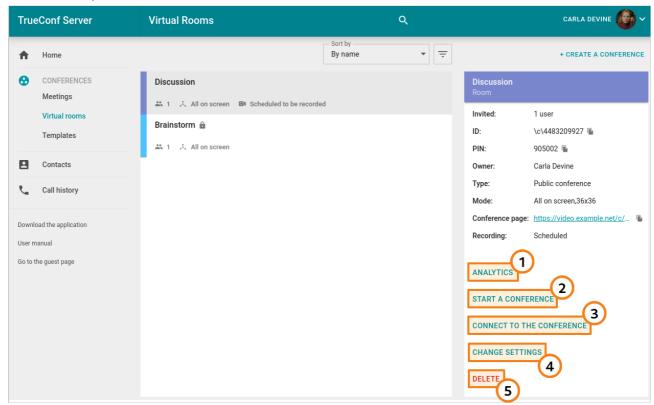
To add a template, use **Create a template** button in the upper right corner of the **Templates** section. You can also save your conference as a template when creating it.

To use a template, select it in the **Templates** section and create a conference using the buttons in the panel on the right. You can also edit or delete the selected template.

# 9. Conference management

# 9.1. Managing an event in its information card

Before the conference starts, you will have access to a number of features in the card of this event (if you are the owner). You will be able to:



- 1. Go to conference analytics
- 2. Start the event
- 3. Join the conference from its web page (for a virtual room) or add it to your calendar (for a scheduled event)
- 4. Open the conference editing menu
- 5. Delete the event.

All other participants (including moderators) will only be able to join the event (for a virtual room) or add it to their calendar (for a scheduled conference).

When the conference starts, the list of features will change, and the owner will be able to view analytics, access the real-time meeting management section, and set or change PIN.

# 9.2. Real-time meeting management

You can change the video layout and control participants' devices during an ongoing conference right in your personal area. To do it, use the **real-time meeting management tool**.

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This feature is available in one of the following cases:

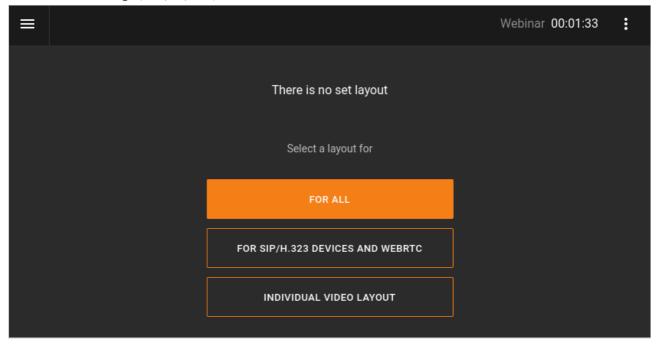
- You are the conference owner.
- You are a conference moderator.
- You have the operator rights which means that you automatically become a conference moderator.

In the last two cases you have to be connected to the conference from a browser (via WebRTC) or in your client application and added to the list of invited participants before the start of the meeting; otherwise, this event will not be displayed in your personal area.

To go to the real-time meeting management section, select a conference in the **Meetings** or **Virtual rooms** section and click **Conference manager** in the panel that will be opened on the right side.

On the new browser tab, you will see the real-time meeting management tool, namely, the layout management page. In the upper right corner, one can check the conference name and its current duration.

The button opens the menu where a user can find the list of participants while the button to additional settings (PIN, ID, etc.).



### 9.2.1. Changing video layouts

The order of participants' video windows in the layout (all participants in "all on screen" mode and presenters in a moderated role-based conference or a smart meeting) is determined in the following way by default: the windows are displayed in the order in which participants joined the conference. The layout is filled from left to right and from top to bottom starting from the upper left corner.

In case of a smart meeting, it is impossible to manage layouts since the group of presenters displayed in the layout is formed automatically. So, you will immediately see the list of participants with buttons for managing their devices.

If layouts have not been configured yet, you will see the list for adding them after accessing the real-time meeting management section. Select the layout mode that you want to apply:

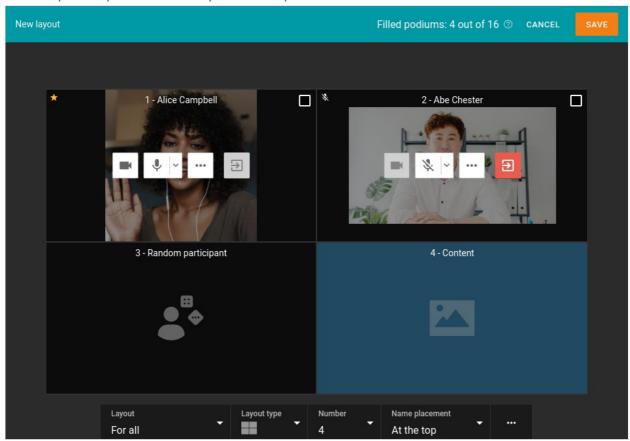
- for all participants
- for SIP/H.323 and WebRTC users

• individual video layout for a specific meeting participant.



Layout management is unavailable in video lecture and smart meeting modes.

After that you will proceed to the layout control panel.

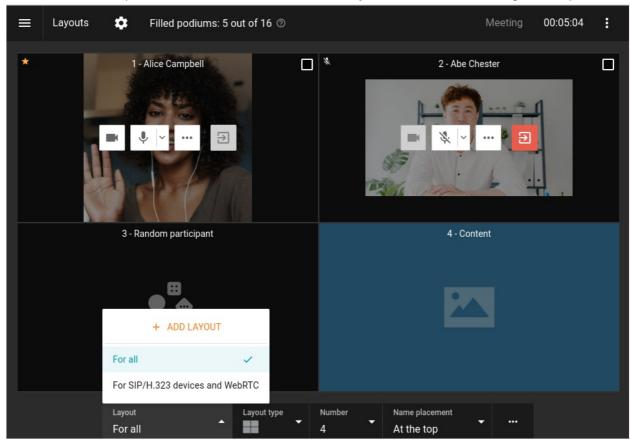


- 1. Click on each video window and select its type in the pop-up menu displayed on the right side. If a window is supposed to be reserved for a certain fixed user, select a participant. You can drag any video window with your mouse and enlarge (prioritize) it with a double-click.
- 2. Select the type of video layout (arrangement of video windows) in the lower part of the menu.
- 3. Specify the number of video windows in the layout.
- 4. Choose the location of the video conference participants' names in their video windows: at the top, at the bottom, or choose not to display them.
- 5. Click ••• to open advanced settings:
  - o forbidding users to change the video layout
  - filling in the layout automatically
  - clearing the layout (the number and location of video windows will not be changed)
  - o deleting the layout.

After setting participants' video windows and changing their position in the layout, click on the **Apply** button. In case of a *moderated role-based conference*, the participants added to the layout will be automatically invited to the podium.

The number of available podiums in all video layouts will be displayed in the upper panel. For more details, refer to the rules for reusing unique slots.

To switch between layouts or add a new one, click on the **Layout** button in the meeting control panel:



If you want to enable meeting participants to decline the layout you have applied, select **Enable** users to change layout in the additional settings when creating the video layout.

#### 9.2.2. How to rename a participant

You can change the name displayed in the video layout for any participant. This change will apply only to the current layout and will not affect the user's name in the address book.

- 1. Click on the | ··· | button in the participant's video window to access the additional menu.
- 2. Select the Change display name option.
- 3. Enter the new name in the pop-up window and click **Save**.

Renaming is also possible when a participant is replaced in the video window.

#### 9.2.3. How to add a content window

To add an extra video window where shared content or slideshow will be displayed, just select a slot and set its type to **Content**.

#### 9.2.4. Managing participants' audio and video devices

You can control participants' devices right after adding them to the layout with these buttons:



— mute/unmute microphone

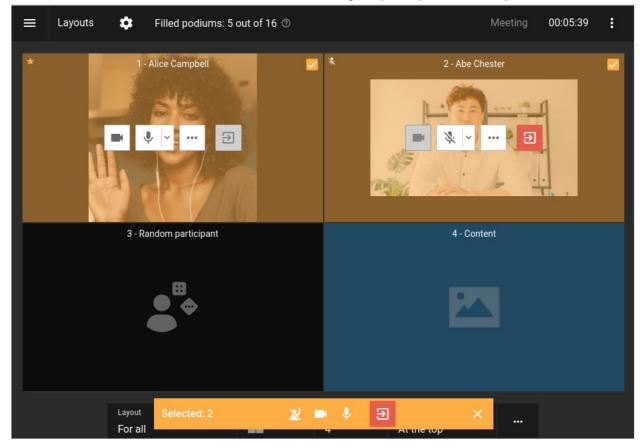
— increase/decrease microphone gain (displayed when clicking on the arrow icon

which is on the right side of the microphone)

--- open the additional menu where you can:

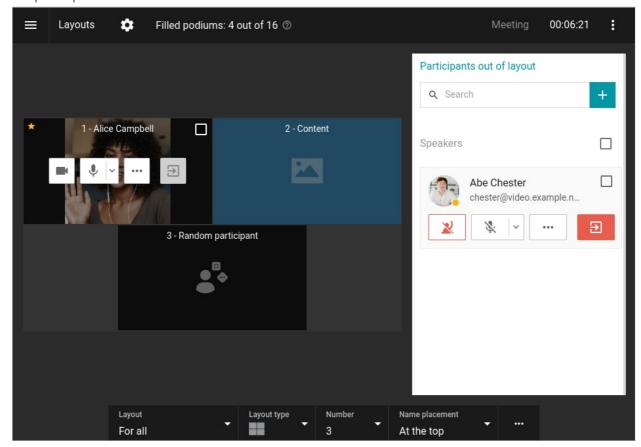
- remove a participant from the podium or invite him/her to the podium (available only in a moderated role-based conference)
- rename a participant in the layout
- replace a participant in the video window with a different one
- set up audio and video devices (choose and set up camera, audio capture and playback devices, adjust microphone sensitivity)
- select the channel to output audio to this participant (only in a conference with activated synchronization mode);
- assign a moderator
- set an individual layout for a participant
- spotlight a video window or make it smaller (in the layout with a spotlighted window)
- clear the video window.

To select multiple participants, check the box in the upper right corner of the video window for each participant. In the toolbar at the bottom of the screen, you can turn off cameras and microphones of multiple meeting participants and remove them from the conference. In a *moderated role-based conference* there will be an additional button for removing the participant from the podium.



Click next to the conference name if you need to hide participant management buttons or display the list of users who were not added to the layout. You will be able to use the following options for managing

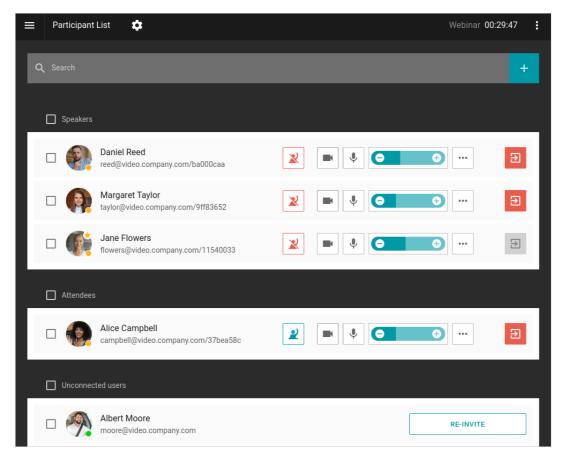
#### each participant:



# 9.2.5. List of conference participants

You can also go to the full list of participants by clicking the button and selecting the **Participant List** option. In this list, you can remove some users from the conference, invite new participants, and control their devices.

To return to the video layout management, click the button and select the **Layouts** option. In *moderated role-based conference* mode, there will also be buttons for inviting and removing users from the podium.



By clicking the button , you will open the menu for changing the display mode: as a list or as tiles.

### 9.2.6. Add a new participant to a conference

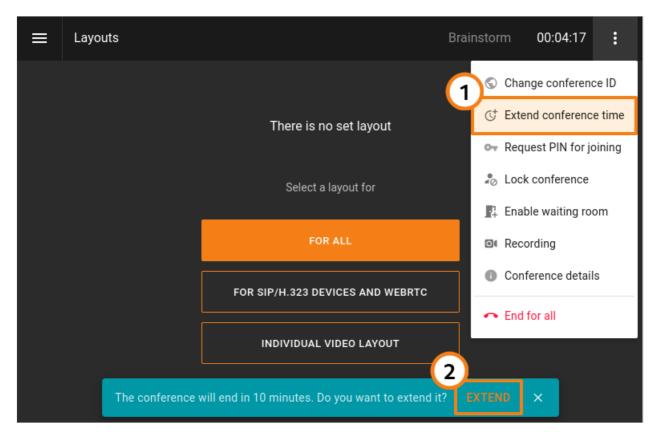
You can invite users to an ongoing conference. To do it, open the list of participants and click the button which is on the right side of the search bar.

The window for adding users will open. There you can select users in the same way as you would when creating a conference.

\* One can also invite users to the conference in the layout management window, if participants, who are not added to the layout, are displayed.

#### 9.2.7. Conference time extension

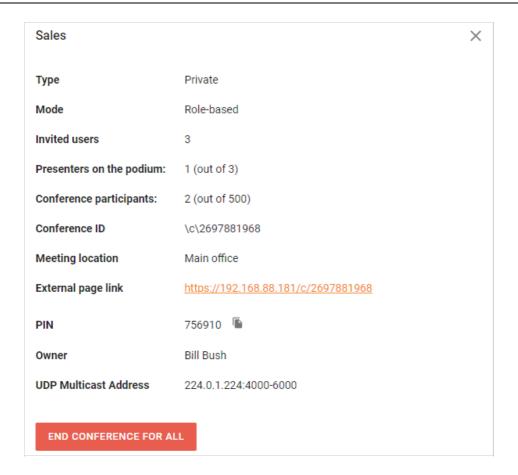
If conference time extension was activated when creating a **scheduled** meeting, all moderators will be able to increase the duration of the event. One can do it in two ways in the real-time meeting management section:



- 1. Click the **Extend conference time** option.
- 2. If the reminders about upcoming conference ending were activated (check the corresponding box), the notification with the **Extend** button will be displayed in the lower part of the control panel.

#### 9.3. Conference information

In the real-time meeting management section you can check information about the conference by clicking the button and selecting the **Conference details** option. A new menu will open: here, one can view detailed information about the event and end it with the corresponding button:



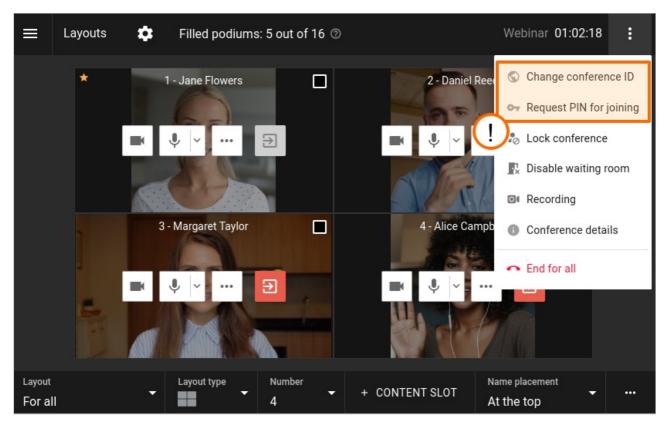
UDP Multicast address and RTSP streaming are displayed only if the corresponding settings were configured when creating a conference by the administrator in the TrueConf Server control panel. The HTML code of the widget is additionally displayed for public conferences to embed it in your website.

# 9.4. Changing the conference PIN and ID on the fly

It is possible to change the PIN (needed for joining the meeting) and ID (unique identifier) of an ongoing conference. For example, when all invited participants have joined the conference, you can protect this meeting against unwanted connections. This feature is available in the same cases when real-time meeting management is available.

To change PIN or ID:

- 1. Go to the real-time meeting management section.
- 2. Click on the button
- 3. Select one of the options and specify the new value of PIN or ID. One can also generate a PIN automatically or set a new one if it was not specified before.



The owner can also set the PIN code in the card of a conference available in the list of scheduled events or virtual rooms.

# 9.5. Locking a conference

A moderator can lock a conference for new participants either temporarily or up until its ending. The conference can be locked in one of these ways:

- Select an ongoing conference in the list of meetings in your personal area, and click **Lock conference** in the card of this conference.
- Go to the real-time meeting management section, click the button and select **Lock conference**.

When a conference is locked

- it *can* be joined by:
  - Moderators (including the owner)
  - Users who will be explicitly added by the moderator (including those who were previously invited, but did not join).
- it *cannot be joined* by:
  - Authorized server users who were not explicitly invited by the moderator after the conference was locked
  - Users who were added to the list of invited participants before the conference started, but did not join before the conference was locked
  - Guests (in case of a public conference).
- Each time when a conference ends, it automatically becomes unlocked which is the default status.

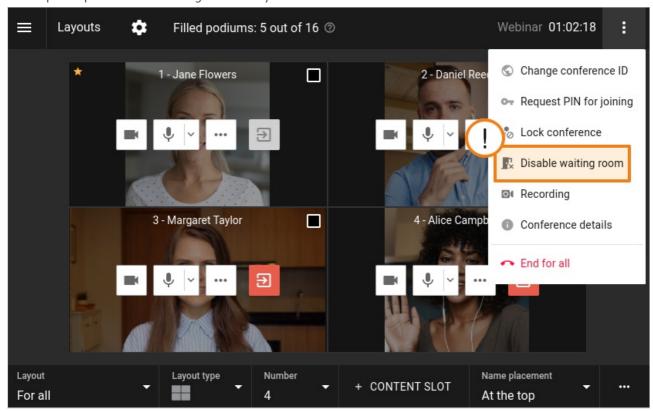
One can make a conference accessible to new participants in the same section where the conference can

be locked. Select the option **Unlock conference** in the conference card or in the real-time meeting management section.

### 9.6. Waiting room management

A conference moderator can control the waiting room (enable or disable it) during the meeting. To do it:

- 1. Go to the real-time meeting management section.
- 2. Click on the button :
- 3. Depending on the current state, select **Enable waiting room** or **Disable waiting room**.
- 4. When the waiting room is disabled, you will see a pop-up window where one can choose the actions for the participants in the waiting room: they can be invited to a conference or removed from it.

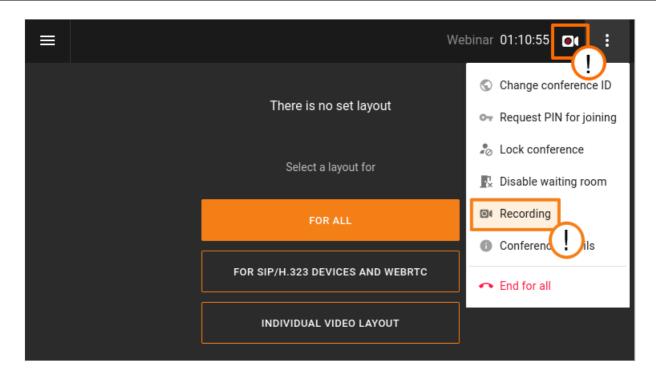


Each time when a conference is ended, the status of the waiting room is reset to the value specified on the **Advanced** tab before the start of the conference.

### 9.7. Conference recording

As the owner, you can start video recording not only when creating or editing a conference, but also when this meeting has already started. To do it, take these steps:

- 1. Go to the real-time meeting management section.
- 2. Click on the button
- 3. Select the **Recording** option.
- 4. In the opened window start or stop recording (if it was started previously).
- 5. If recording has already started, click the button which is next to the conference duration timer.



A conference can be recorded only if this feature was previously activated by the administrator of your TrueConf Server.

# 10. How video layouts work in TrueConf

You can flexibly configure how participants' video windows will be arranged. This feature is available both during a TrueConf conference and before its start. To help you find the most convenient video layout option, let us take a closer look at how a layout is formed and what types of video windows can be included.

# 10.1. Types of layouts and video windows

There can be three types of *video layouts*:

- for all participants
- for SIP/H.323 devices and WebRTC (browser connections)
- individual video layout for a participant.

All *video windows (slots)* in each layout can be one of the following types:

- Fixed a specific conference participant is displayed.
- Random the first participant, who has not been included in the video layout, will be displayed in such a slot. This is the default window type for all layouts, except for the smart meeting.
- **Time-based shuffling** this window is reserved for the participants who are not continuously displayed in the layout and are alternated (rotated) at a specified interval.
- Active speaker the participant, who is speaking or sharing content, is displayed in the video window. If several participants are speaking simultaneously, priority is given to the one who is speaking louder. This type of slot is assigned to all video windows in all smart meeting mode. In smart meeting mode, one can pin presenters in such windows so that they do not get replaced when they stop speaking.
- **Content** displays the content shared by one of the participants either in his/her window or in a separate stream. There can be only one window of this type in the layout.

# 10.2. Unique video windows and limits

The number of unique slots for a conference cannot be greater than the number of podiums for the selected conference mode (for example, 16, if a moderated role-based conference with 16 speakers is selected). The following rules apply:

- 1. Every slot, except an empty one, is unique. For example, if you assign the participant **Smith** to a slot in the video layout, the slot becomes unique. If a new participant **Jones** is selected in another layout, the corresponding slot will also become unique because this person was not previously selected anywhere. As a result, we have 2 unique slots used across all video layouts.
- 2. The same slot will be reused in different video layouts, for example, the content slot. This approach ensures more optimal use of server resources without increasing the number of media streams.
- 3. If a slot of a certain type is already used in one of the layouts (for example, in the layout for all participants) and is specified in another layout, this slot will be reused. In this case, the same video stream will be displayed in both layouts for this slot, even if it is not of a fixed type. For example, if a random slot is created in two layouts, the video stream will be reused and the same participant will be displayed in both layouts.

Let us consider some examples.

#### Example 1

We are scheduling a conference in "all on screen" mode with 49 speakers and this event is expected to have 49 participants. This means that there can be a total of 49 unique (different) slots in all video layouts, for example:

• One common layout for all participants with 40 fixed slots (participants were explicitly selected from the list for each video window); besides, there is a content window and 8 slots with participants who are

rotated (alternated) at a certain interval.

or

• One common layout for all participants with 20 fixed slots and one layout for SIP/H.323/WebRTC with 29 fixed slots.

or

• One common layout with a content window and two individual layouts with 24 different fixed slots for each.

#### Example 2

A "moderated role-based conference" with 16 speakers (podiums) is scheduled and 20 participants are invited in total. This means that in all video layouts, there can be a total of 16 unique (different) slots, for example:

• One common layout for all participants with 10 fixed slots (participants were explicitly selected from the list for each video window); in addition, there is a layout for the moderator with 6 slots where participants are alternated (rotated).

or

• One common layout for all participants with 10 fixed slots and one layout for SIP/H.323/WebRTC with 6 fixed slots.

or

• One common layout with a content window and one layout for SIP/H.323/WebRTC with a content window and 15 slots with alternating participants. In this case, there will be a total of 17 slots (15 with alternating participants and 2 with content), but in total, 16 slots will be unique because the content slot is reused in the second layout.

#### 10.3. Limits in conference modes

For **smart meeting** mode:

- When a layout is created, all video windows are set to the Active speaker type by default.
- The maximum number of reserved slots with the Active speaker type is limited to:

```
number of spots on the podium - 3
```

- There must be at least 2 slots of the **Active speaker** type in each video layout.
- If there are no more than two **Active speaker** slots, it will be impossible to change their type.

For moderated role-based conference mode:

• There is no option to select **Time-based shuffling** and **Active speaker** types for the slot.

In **video lecture** mode layout customization is not available because the layout is generated according to a fixed rule: the lecturer (speaker) sees all participants, while each participant sees only the lecturer.

#### 10.4. Settings of video windows with alternating participants

For the slots of the **Time-based shuffling** type, one can change the parameters for alternating participants (general settings for all slots and layouts for each specific conference):

- The sequence of rotation (alternation): from the first participant available in the video layout to the last one, or vice versa
- The interval at which participants alternate (rotate) in the slots
- Alternation type:
  - **Replace** a user is replaced with another participant who is not in the video layout.
  - Move participants are moved from their slot to the nearest one with the type Time-based shuffling.

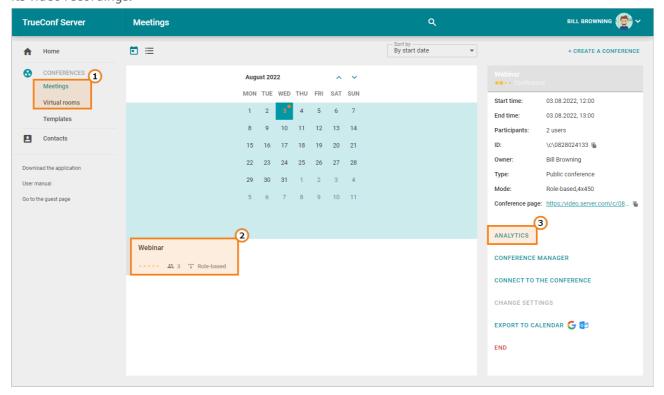
# 10.5. Changing slot types when switching modes

If the conference mode is changed, and some layouts have already been created, certain slots will change their type due to the restrictions described above:

- When switching to **moderated role-based conference** (from any mode), all **Time-based shuffling** and **Active speaker** slots will change their type to **Random**.
- When switching to **smart meeting** (from any other mode), in other words, there must be at least 2 video windows for active speakers:
  - if the layout includes multiple slots of the **Random** type, then 2 of them will change their type to **Active speaker**.
  - If there is not enough slots of the **Random** type (less than two), other slots will be randomly selected for switching to the **Active speaker** type.

# 11. Conference analytics and video recordings

If you are the owner of a conference, you will be able to view analytics about this event and check the list of its video recordings.



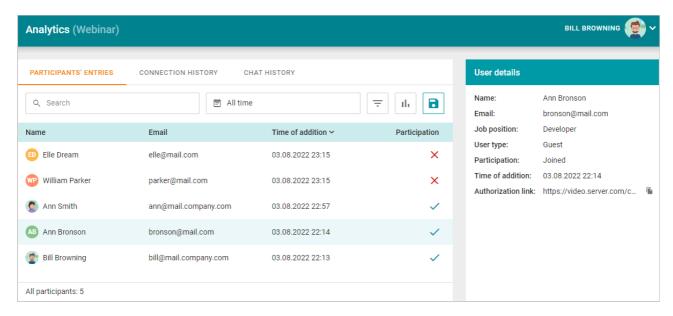
This feature is available for any conference regardless of its schedule mode (a virtual room or a scheduled conference) and its status (ongoing or inactive).

# 11.1. Conference analytics

TrueConf video conferencing system enables the owner to view detailed analytics about the meeting: e.g., information about participants, the time when they were added to the list participants and joined the conference. It is also possible to view the conference chat history. To do it, select the conference in the **Meetings** or **Virtual rooms** section and click on the **Analytics** button in the conference card:

#### 11.1.1. Information about participants

Go to the **Participants' entries** tab to view detailed information about the participants and check the time when they were added to the list of participants. Please note that in case of a webinar with open registration, you will also be able to view information about the guests who signed up for the meeting:



If you select a participant in the list, you will be able to view information about this user. For example, here, we have selected the user named *Ann Bronson*.

In the search field, participants can be filtered by name or email. You can also click on the 📃 button to

filter participants by two parameters:

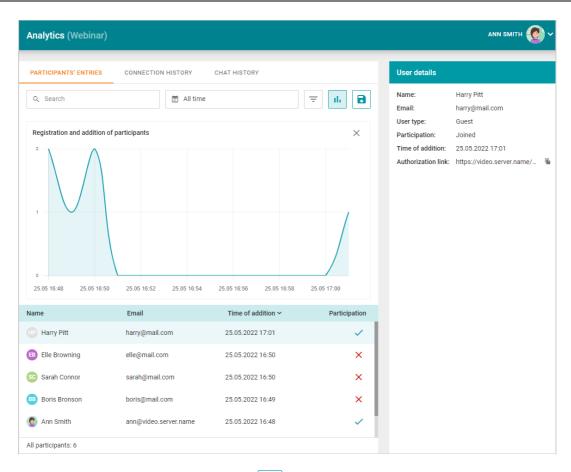
- By authentication type registered server users, guests or all participants
- By connection status (joined or did not join the meeting).

By default, the list of participants is displayed for the period bettwen the time when the conference was created and the moment when it ended. However, you can select a custom time interval by clicking on the

🖹 calendaricon.

To display the chart showing when users were added to the list of participants click on the button.

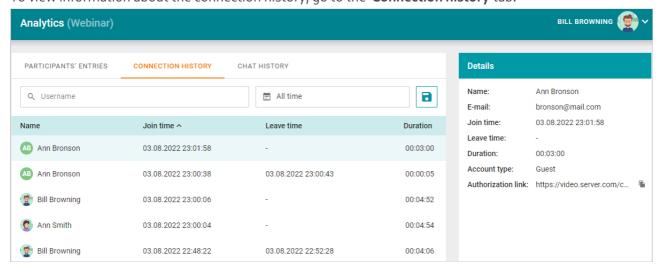
You will be able to apply the following filters:



To save these data to a .csv file, click on the button. Please note that all the lines will be saved regardless of the filters that were applied.

### 11.1.2. Connection history

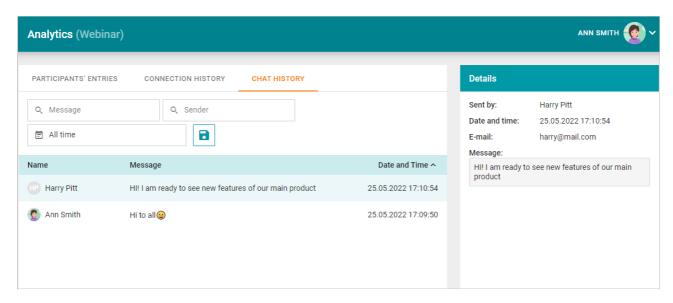
To view information about the connection history, go to the Connection history tab:



You will see information about every connection and exit event. The above examples shows that *Ann Bronson* and *Bill Browning* joined the conference two times. It is possible to search for participants by name and select the time interval for filtering and saving data to a .csv file.

#### 11.1.3. View chat

You will be able to view the entire conference chat history by going to the **Chat history** tab:



Messages can be filtered by words or phrases, sender, and the time of sending. It is also possible to save messages to a .csv file.

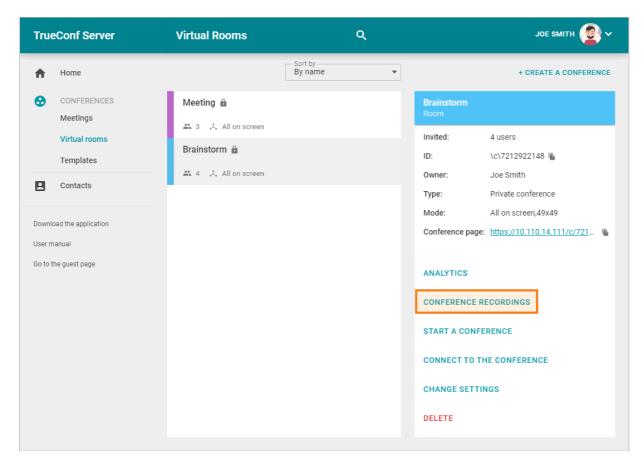
# 11.2. Conference recordings

As the conference owner, you will also be able to download video recordings of the meeting saved on TrueConf Server.



To learn more about working with video recordings saved on the side of TrueConf client application, read this guide.

Go to the **Meetings** or **Virtual rooms** section and select a conference. If there is only one conference recording, you will see the **Download recording** button that will start file downloading. If there are multiple recordings which means that the conference has been started more than once, you will see the **Conference recordings** button that will open the list of files:



If you select a recording, you will see the following information: file name, its format, recording start and end time, duration and size. To download the selected file, click on the **Download recording** button or  $\checkmark$ :

