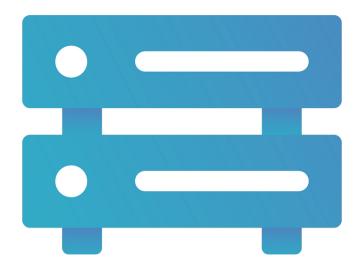


TrueConf Server

User guide



Version 5.5.0

Table of Contents

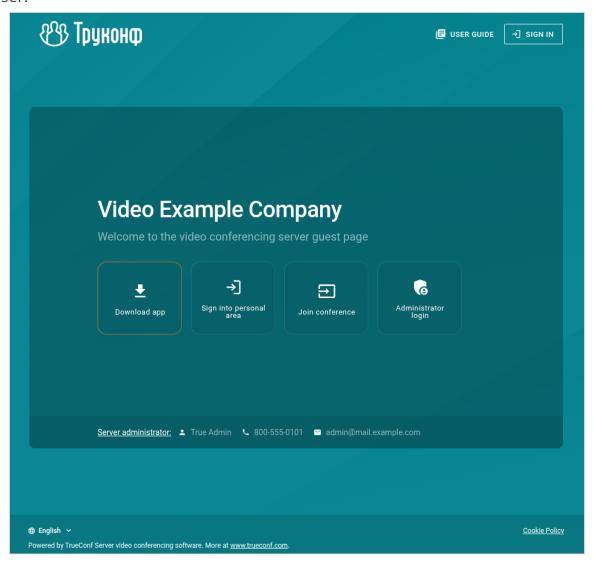
1. Wha	at the guest page is	5
1.1. V	What can be found on the guest page	5
2. Con	necting to the video conferencing server	7
2.1. V	Where to find client applications	7
2.2. F	or which platforms are client applications available	7
2.3. T	rueConf client application features	8
2.4. H	low to connect client applications to TrueConf Server	8
2.5. H	low to update client applications	8
3. Call	string formats	9
3.1. C	Calling a TrueConf Server user	9
3.2. C	Connecting to a conference	9
3.3. C	Calling SIP endpoints	10
3.4. C	Calling mobile phones and landlines	11
3.5. C	Calling H.323 endpoints	11
3.6. C	Calling RTSP endpoints	12
3.7. C	Calling external users by email	12
3.8. L	Jsing Dual-Tone Multi-Frequency (DTMF)	12
4. Calls	s to TrueConf Server via SIP/H.323	14
4.1. C	Connecting to a conference	14
4.2. C	Call to a TrueConf Server user	14
4.3. A	Additional features	14
5. Pers	sonal area	16
5.1. F	How to sign in	16
5.2. N	Main page	17
5.3. L	icense information	18
5.4. L	ist of conferences	19
	C	20
5.6. A	Address book	20
5.7. C	Call history	21
5.8. C	Chats (beta version)	22
6. Feat	tures available to your account	24
6.1. A	Address book editing	24
6.2. N	Make calls (video calls)	24
6.3. C	Create group conference	24
6.4. S	Screen sharing	25
6.5. A	Ability to allow control of your desktop	25
	'	25
		25
		25
6.9. R	Receive files	25

TrueConf Server	User guide
6.10. Conference recording	25
6.11. Operator rights	25
7. Conference page	27
7.1. A virtual room or a scheduled conference that has already been started	27
7.2. Scheduled conference without registration	28
7.3. Scheduled conference with open registration	29
7.4. Why do we recommend using the client application instead of a browser?	31
7.5. Equipment Selection	31
7.6. Main conference window in the browser	32
7.7. Managing the conference chat	33
7.8. Taking the floor and selecting a translation channel	34
8. Conference scheduling	36
8.1. "General" tab	36
8.1.1. Selection of the participants who will be moved to the waiting room	37
8.2. "Participants" tab	38
8.3. "Layout" tab	39
8.4. "Interpretation" tab	42
8.5. "Additional" tab	43
8.6. "Registration" tab	44
8.7. Templates	46
9. Conference management	47
9.1. Managing an event in its information card	47
9.2. Real-time meeting management	48
9.2.1. Changing video layouts	49
9.2.2. How to rename a participant	52
9.2.3. How to add a content window	52
9.2.4. Managing participants' audio and video devices	52
9.2.5. List of conference participants	54
9.2.6. Add a new participant to a conference	54
9.2.7. Conference time extension	55
9.3. Conference information	55
9.4. Changing the conference PIN and ID on the fly	56
9.5. Locking a conference	57
9.6. prohibition on sending audio remarks in the case of a moderated role-based co	onference;
9.7. Waiting room management	5858
9.8. Conference recording	59
10. Surveys	
10.1. Types of questions and limitations	61
10.2. Creating and editing a poll	62
10.2.1. Creating a Poll	62
10.2.2. Survey campaigns	64

User guide
65
68
68
68
70
70
70
71
71
71
73
74
74

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
- if you are a server administrator, log in to the control panel;
- View the user guide.

You can change the language of the guest page using the dropdown menu with the icon located in the bottom left corner of the page.



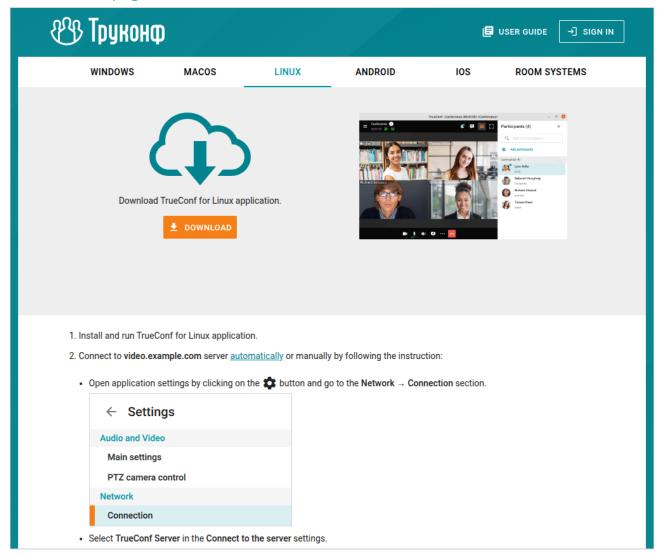
If the contact information for your server administrator has been provided, it will be displayed below the central buttons on the guest page.

2. Connecting to the video conferencing server

To use the video conferencing system, you need to have one of the TrueConf client applications installed 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 (its address can be obtained from the server administrator) or from the downloads page on our official website.



2.2. For which platforms are client applications available

The following platforms are natively supported:

- Windows
- macOS
- Linux
- Android
- Android TV
- iOS
- iPadOS
- WebRTC (from the browser)

i

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
- create private and public surveys, which is also accessible from your personal area;
- 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 the application to TrueConf Server, specify the server address on the network and complete the authentication process. For more detailed information, please contact your server administrator.

2.5. How to update client applications

The client applications TrueConf for Windows are integrated into the TrueConf Server installation package and are automatically updated when the server is updated. Applications for Linux are available on our website and in each operating system's repository. A download of the dmg installer file for macOS is also available. For all installation methods of the TrueConf application for Linux, please refer to the relevant 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.

To make calls using external SIP/H.323/RTSP protocols, you need available licenses on your video conferencing server. If you are unable to reach a destination, please contact your administrator, as the issue may be related to licensing.

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.

You can also call a user from a different TrueConf Server instance (only if the federation has been configured between the servers). To do so use the following call string format: <TrueConf ID>@<server> , where:

- <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 to join from the TrueConf client application is by simply pasting this link into the search bar and clicking the call button. You can join a public conference directly from the application's start page. For more details, refer to the documentation.

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:

- <CID> is a conference ID
- <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
 - <user id> is an SIP username.
- #sip:<user id>@[<server name>] , where:
 - <server name> is the IPv6 address of an SIP server;
 - <user id> is an SIP username.
- #sip:<user id> , where:
 - <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:
 - <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).

In such a case these parameters will be specified after the server address in the following way: :<port>; transport=col>.

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
 - <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.

You can invite someone via email to a conference, but only if it is a public one (webinar). This can be done in the following ways:

- pre-add them to the invitation list on the Participants tab when creating or editing a conference;
- during the webinar via the in-app participant list or in the real-time meeting management.

3.8. Using Dual-Tone Multi-Frequency (DTMF)

You can send DTMF commands to DTMF-compatible devices in RTP EVENTC and SIP INFO commands. 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

You can also **send DTMF commands from terminals** during a *moderated role-based conference*. The following DTMF commands are available:

- 1 request to speak;
- 2 leave the podium.

To do this, use the included remote control or keyboard. Refer to the instructions for your specific device for more details.

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=<protocol>
```

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

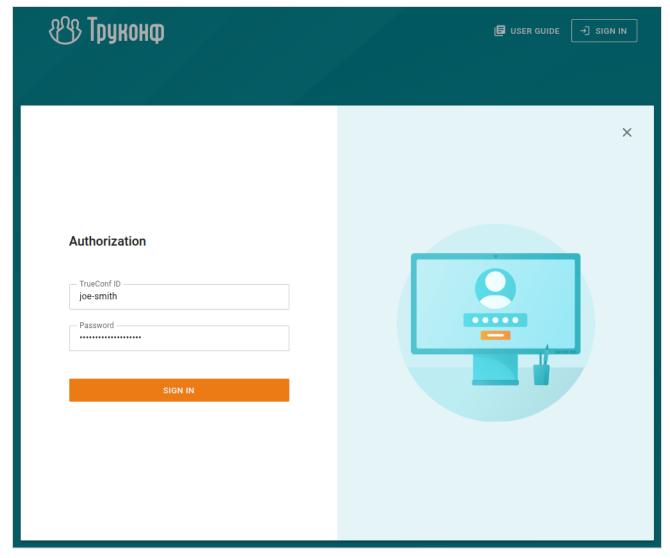
Personal area is a server-hosted web page designed for scheduling conferences or editing personal data or the address book.

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.

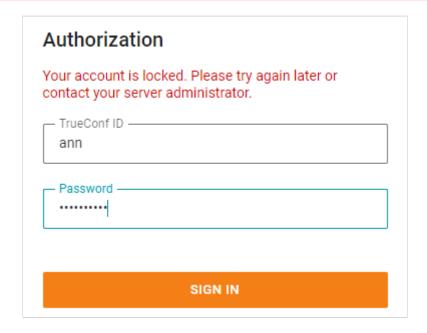
You can request the administrator to provide access credentials for the guest page.



!

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.



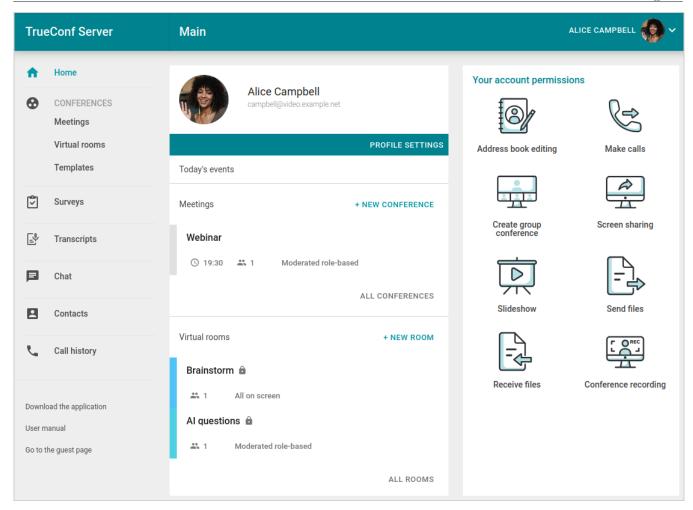
5.2. Main page

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.

İ

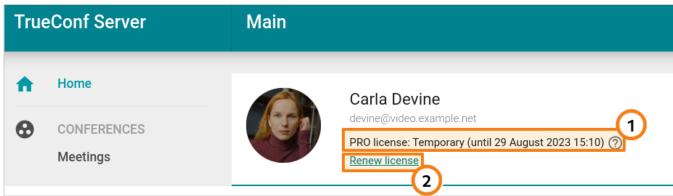
This list does not include the meetings created ad hoc in TrueConf client applications, for example, in the **Conferences** →**Meet now** section of TrueConf for Windows.



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):

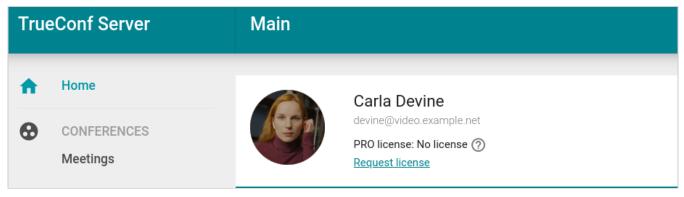


1. License information:

- 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.

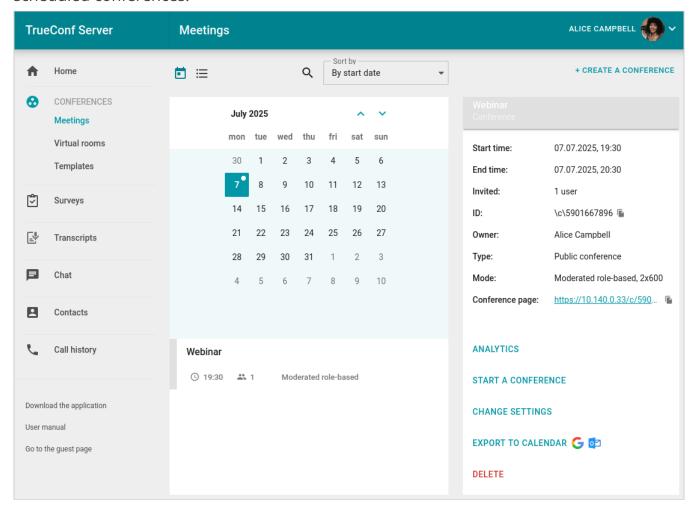
In the card of the selected conference, you can find:

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



5.5. Profile settings

To change your account details and the interface language of your personal area, click on your avatar in the top right corner and select **Profile settings**.

On the **Personal data** tab, you can upload an avatar or take a photo using the webcam. You can also edit your personal information if permitted by the server settings.



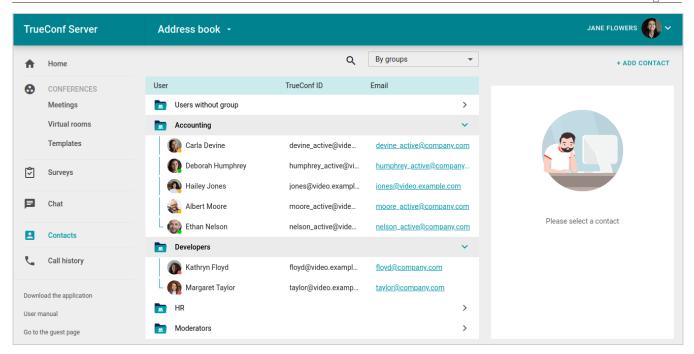
You may need to give the browser access to your webcam to take a photo.

In the **Email and password** tab, you can change your email and password (if permitted by server settings).

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

5.6. Address book

To view and edit the address book, navigate to the **Contacts** section. You can choose to display it by groups or as a continuous list.



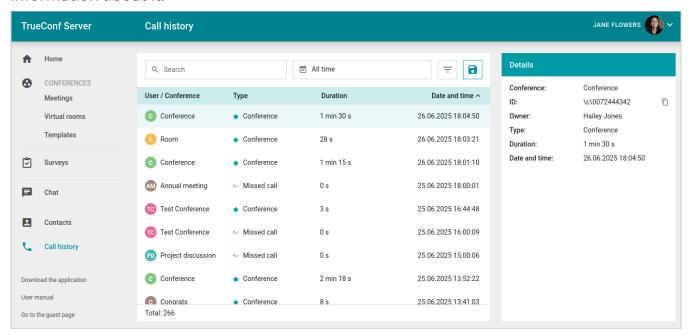
You can select any contact to call or start chatting. To contact a user, you will need a client application which can be downloaded by clicking the **Download the application** link in the personal area menu.

i

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:



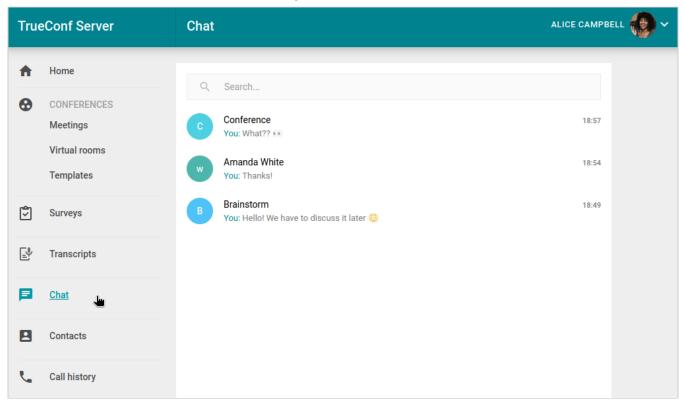
5.8. Chats (beta version)

The personal area also offers basic chat features:

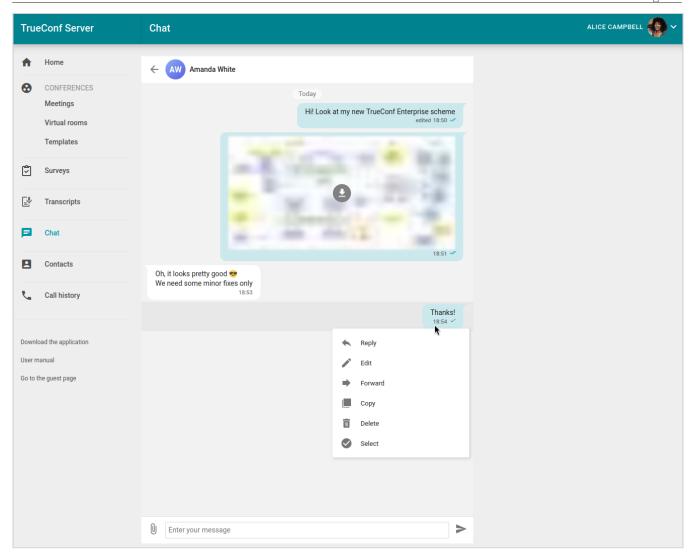
- view the list of all available chats;
- opening any existing chat, but not starting a new conversation;
- · sending text messages and files;
- Key actions with messages: forwarding, editing, replying, deleting;
- Downloading files, including built-in image viewing.

For full-featured chatting, the TrueConf client application is required, but the chat in the personal area allows you to quickly view and reply to messages in the browser if you don't have the application at hand for some reason.

Go to the **Chat** tab to see the list of all your chats:



To open any of the chats, click on it in the general list:



23

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.

If any of these features is unavailable to you, contact the server administrator and ask for a list of 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 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. Ability to allow control of your desktop

If this feature is available and you are participating in a conference from the desktop client application, you can allow others to control your desktop. Please note that a request for control can only be made if you are sharing your screen (not an application window or presentation). Additionally, you need to enable the option to request control from another user in the application settings.

6.6. Remote desktop control

If this feature is available, you will be able to control your counterpart's desktop during a video call or conference, provided they have granted the necessary permission in the application settings. Please note that you can request control only if they are sharing their screen (not an application window or presentation).

6.7. 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.

6.8. 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.

6.9. 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.

6.10. 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.

6.11. 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.

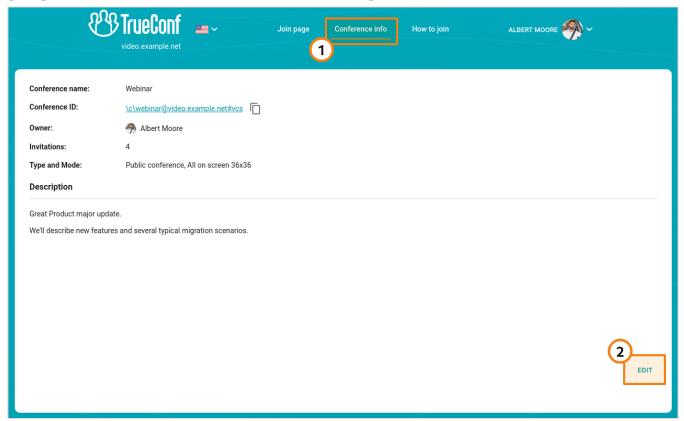
Moderator is a conference participant who is allowed to:

- 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.

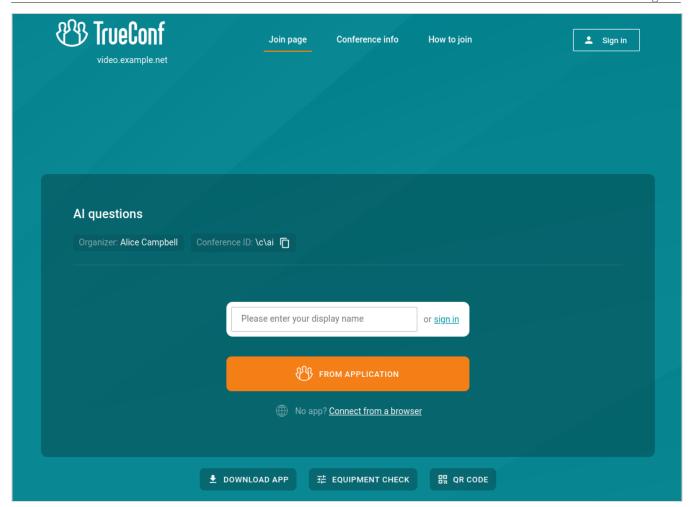
The conference owner will be able to make use of additional features on the conference page. If the event has not started yet, the owner will be able to edit the description by going to the **Conference info** section and clicking **Edit**:



As a tool for participating in a conference, it is recommended to use the client application rather than a browser, as it offers significantly more features.

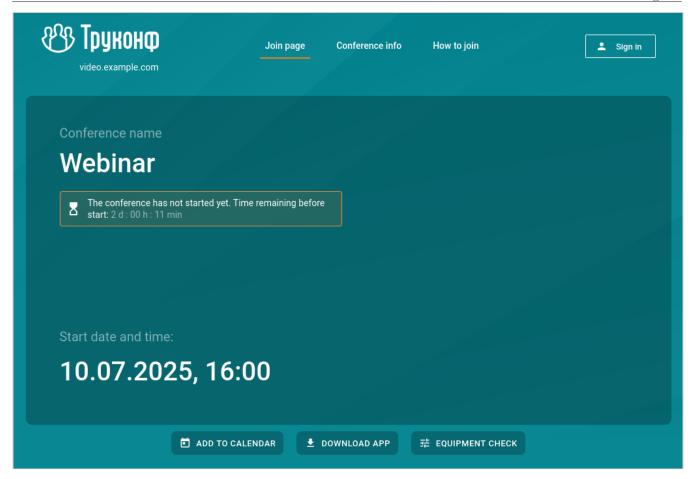
7.1. A virtual room or a scheduled conference that has already been started

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

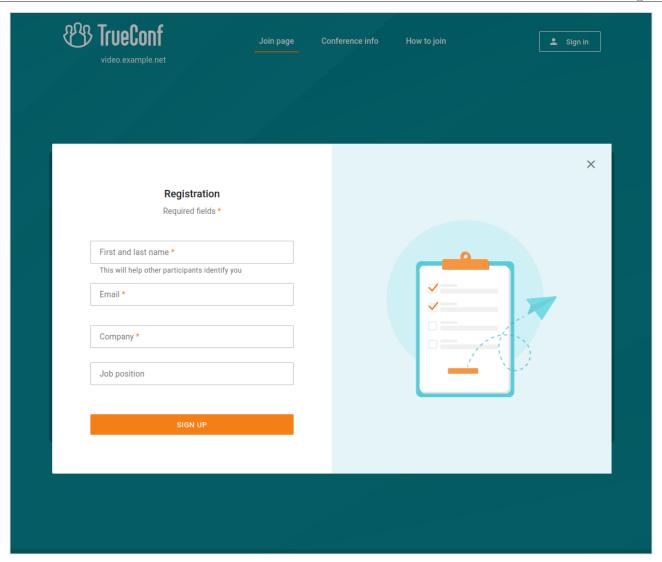
In this case you will see the general information about the webinar and the button for adding this event to your calendar:



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.

7.4. Why do we recommend using the client application instead of a browser?

TrueConf offers convenient client applications for all major platforms. We recommend using these applications to participate in events, as they provide more functionality compared to browsers due to the limitations imposed by WebRTC technology. Additionally, each browser developer may deviate from standard recommendations when implementing certain features. This problem does not exist in client applications, as all functionalities are already available and independent of external vendors. Some obvious limitations of the browser client compared to TrueConf native applications include:

- browser access is unavailable outside of a conference; you can only connect to an active event;
- fewer chat features:
- the maximum file size that can be transferred in the chat is 1 GB;
- there are no moderator capabilities comparable to those in the application (such as participant role management, waiting room, etc.).

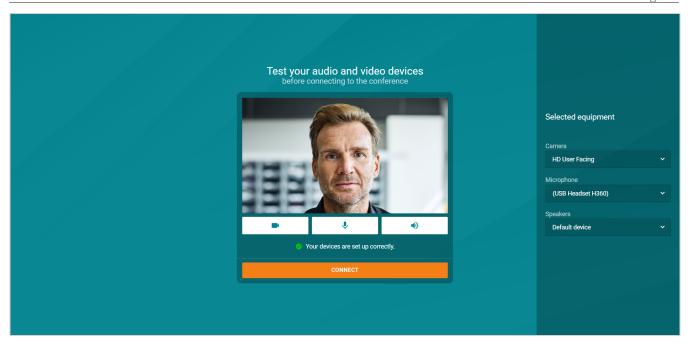
For more details on how to use client applications on different platforms, please refer to the relevant documentation.

If you need to use browser-based connection for TrueConf conferences, you still have the following options:

- connection from popular browsers (a list of verified solutions is provided on the website);
- participation in a conference of any mode and access type (internal or public);
- selection of the translation track when joining a conference with simultaneous interpretation;
- using event chat;
- screen or window sharing;
- sending a request for podium access in a moderated role-based conference.

7.5. Equipment Selection

After connecting to the conference through a browser, you will see the equipment selection window:



Select the desired equipment from the panel on the right using the drop-down lists. Then click the **Connect** button to participate in the event.

7.6. Main conference window in the browser

After joining the conference, you will see the main window:



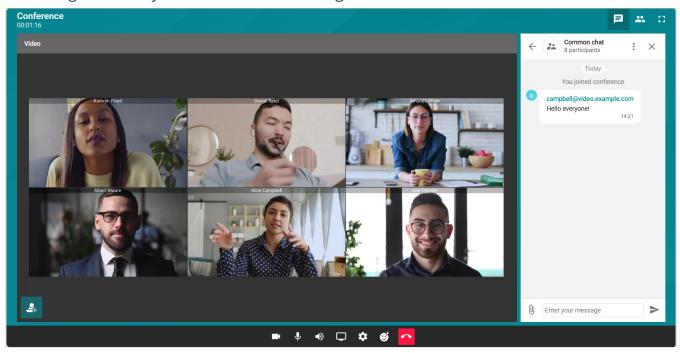
Here you have access to the following features:

- 1. Enable/disable camera;
- 2. Enable/disable microphone;
- 3. Enabling/disabling conference sound;
- 4. Enabling/disabling content sharing;
- 5. Equipment setup;
- 6. Reactions;
- 7. Disconnecting from the conference;

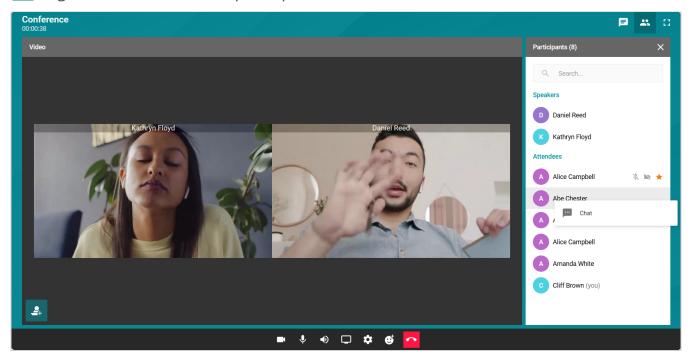
- 8. Opening/closing the event group chat;
- 9. View participant list;
- 10. Enable full-screen mode.

7.7. Managing the conference chat

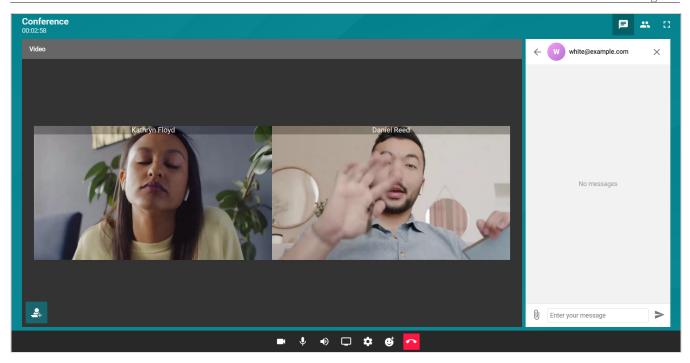
Click the button to open the conference chat. The event's group chat area will appear on the right, where you can send text messages and files:



To send a private message to an event participant, open the participant list by clicking on Right-click on the desired participant, then select **Chat** from the menu:

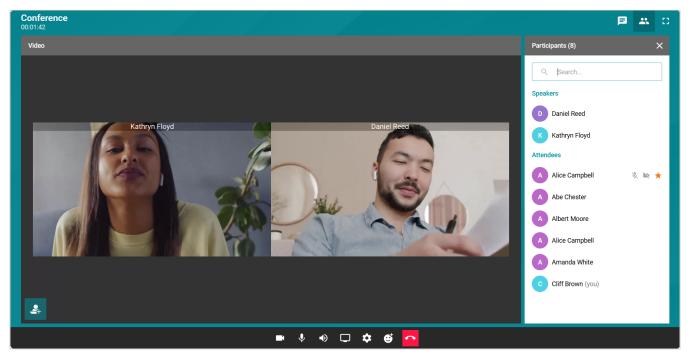


After that, a chat with the event participant will open:

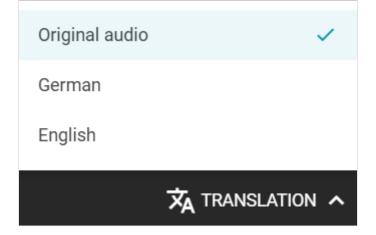


7.8. Taking the floor and selecting a translation channel

Taking the floor is possible in a **moderated role-based conference**. To take the floor, click the button. Then wait for the moderator to approve or decline your request to become a speaker. If approved, you will be on the floor with all the capabilities of a speaker. If you need to leave the floor, click the button.



When participating in a conference with simultaneous interpretation, you can select an audio track by clicking the ATRANSLATION > button. Choose the desired language from the available audio tracks:



8. Conference scheduling

i

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

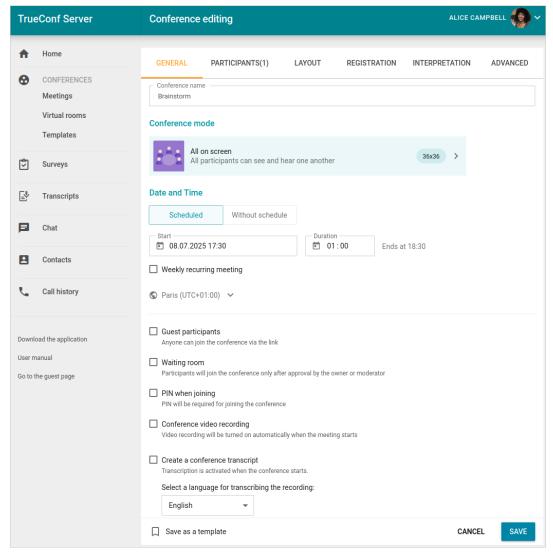
To create a conference on the main page of the personal area, click **New conference** or **New room**.

The event creation window will open on the **General** tab.

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

8.1. "General" tab

The **General** tab at the top contains the essential parameters for creating a conference, along with a variety of other settings:



- Conference name
- mode (by default, Smart meeting is selected);
- 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, set the start date and time, and if necessary, the recurrence frequency.
- If you want the conference to be accessible not only to users of your server (or federation) but also to guests without authentication, check the **Guest participants** box. This will create a public conference (webinar); otherwise, by default, a private event is created.
- You can activate the waiting room for the event. This allows you to select the participant category that will be placed there (see below);
- 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).
- Conference recording (available only if the administrator of your TrueConf Server had previously enabled this feature)
- If your TrueConf Server is integrated with the TrueConf Al Server solution, you can override certain settings for a specific conference:
 - By selecting the checkbox Create a conference transcript, you can save the audio track of the event for AI processing (if allowed by the general settings on your video conferencing server);
 - The checkbox Transcribe when recordings ends will automatically start transcription immediately after the event concludes.

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

8.1.1. 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
- all users from a federated server who were *not invited in advance* before the start of the conference
- all guests.
 - The following participants *will not be moved* to the waiting room:
- users from your server who were *invited in advance* before the start of the conference
- 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.

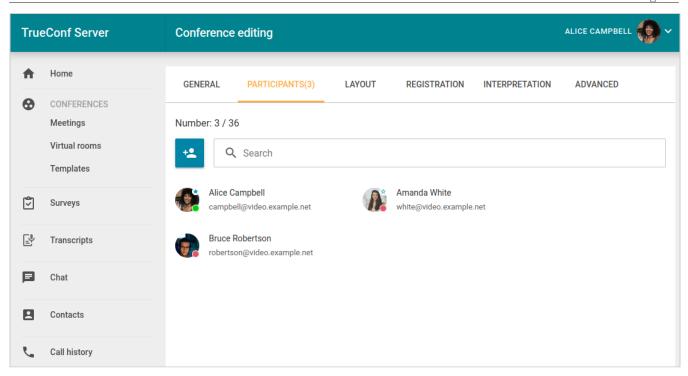
Categories that can be selected for private conferences (the rules are similar to the ones set for webinars except guests and unregistered participants):

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

8.2. "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**.

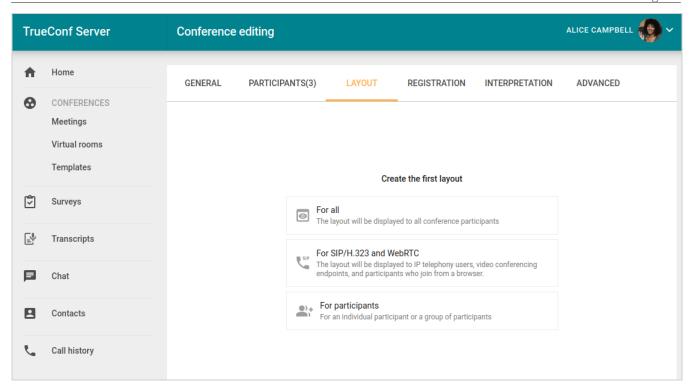
8.3. "Layout" tab



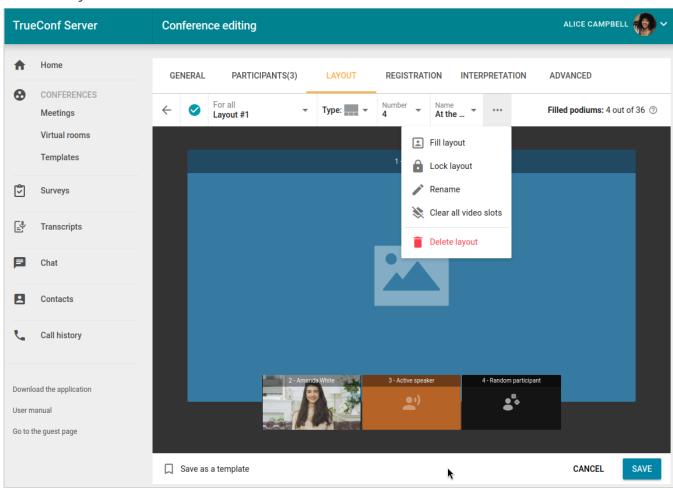
We recommend that you first review the relevant section to learn how parametric video layouts work in TrueConf.

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.

You can create multiple video layouts for each type (e.g., for SIP/H.323/browsers) and switch between them on the fly during a conference. To create the first layout, select its type from the list below:



To set a layout:

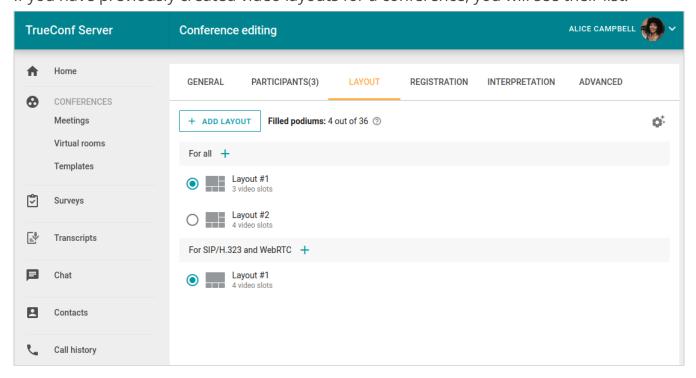


1. Edit the conference video layout. You can move a specific participant's video window and select it as a priority by double-clicking on it. Clicking on any video window allows you to choose its type: **Fixed**, **Random**, **Time-based shuffling**, **Active speaker**, **Content**.

2. If the checkbox at the top of the editor is checked , this video layout will be used as the default when the conference starts (it is automatically set for the first layout in each category). Click this checkbox to disable the activation of the layout at the start of the event.

- 3. You can add a new video layout directly from the editor by clicking on the dropdown list with the layout name and selecting **Add layout**.
- 4. In the **Type** dropdown list, select the video window arrangement in the video layout.
- 5. In the **Number** dropdown list, select the number of video windows in the video layout.
- 6. In the **Name** dropdown list, specify the position of the username in the video window.
- 7. Click the *** button to proceed to the following items:
 - **Fill layout** allows you to automatically fill the slots in the video layout with invited participants; you need to clear the layout before use.
 - Lock layout in this case, participants will be forced to use the specified video layout when it's activated during the conference, and they won't be able to adjust it locally. This is especially useful for connections via third-party protocols such as SIP/H.323, as terminals often have limited capabilities for slot management.
 - Rename assign an easily recognizable name to the video layout (up to 70 characters) to quickly find it in the general list;
 - Clear all video slots completely clears the video layout so you can start filling it again;
 - Delete layout deletes the specified layout. If it was set as the default for its category (for example, for all), no other layout will automatically become the default upon deletion; you will need to assign a new default manually.

If you have previously created video layouts for a conference, you will see their list:



The toggle switch to the left of the name selects the video layout that will be used by default at the start of the conference for each participant type.

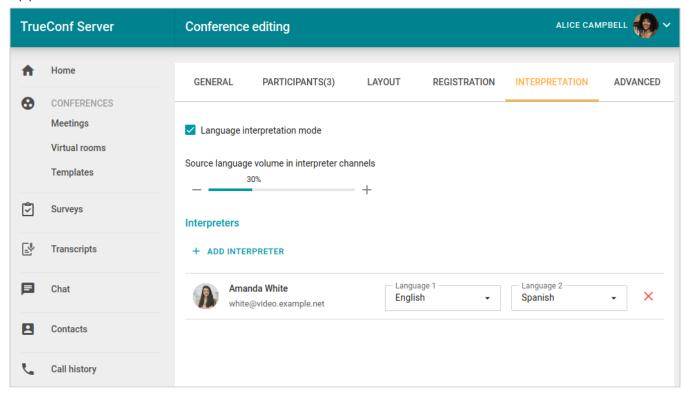
In the general list of conference video layouts, you can configure the settings for displaying video windows with the **Time-based shuffling** type. To do this, click the button in the top right corner of the list. These settings apply to all windows of this type across all layouts of a specific conference. You can select the order of participants' display from the list of those not included in the layout, the shuffle type, and the speed of participant switching:

8.4. "Interpretation" tab

If the event involves participants from different language groups and dedicated interpreters for translating speeches into other languages, then on the **Interpretation** tab, check the **Language interpretation mode** box. To activate interpretation mode, check the **Language interpretation mode** box. When recording a conference with interpretation, multiple audio tracks will be created: a general track and individual tracks for each language configured for interpretation. For more details on setting up language interpretation, refer to the description of the corresponding tab.

Each participant will be able to select in the client application or in the browser (depending on their connection method) the language in which they wish 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).

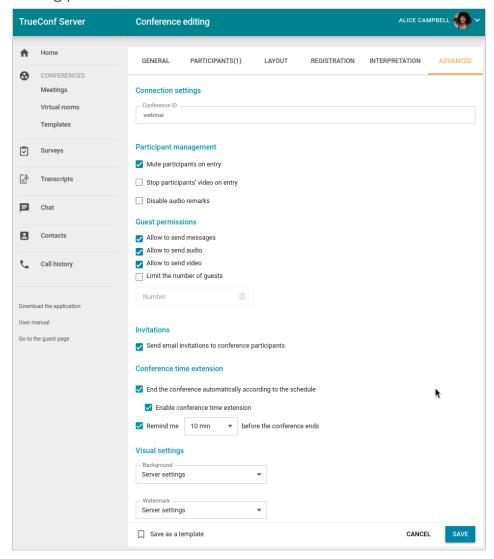
At any given time, only one person can translate from one language to another. For instance, only one user will be able to translate from English to Hindi; however, the second interpreter will be able to translate from Hindi to English.

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).

The option for "relay" translation is also available, and more details can be found in the client application documentation.

8.5. "Additional" tab

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

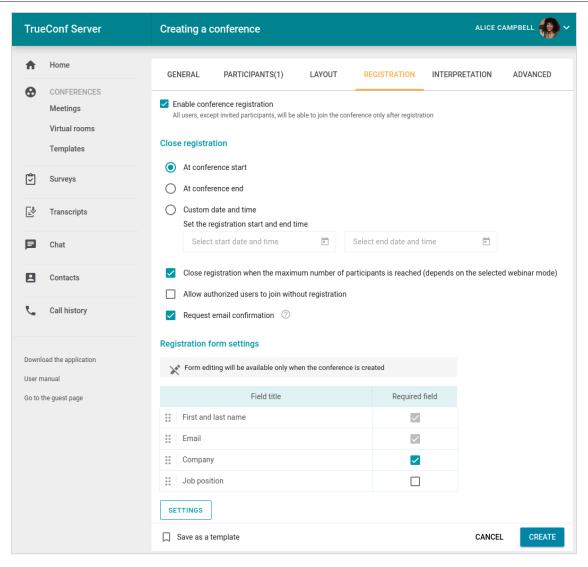


- Conference ID
- Connecting to the conference without invitation (for private conferences only)
- Settings for automatically turning off participants' cameras and microphones when they join the conference
- prohibition on sending audio remarks in the case of a moderated role-based conference;

- 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
- Sending email invitations to participants
- By default, a scheduled conference will not automatically end when its allocated time expires. However, you can enable automatic ending of the event using the checkbox End the conference automatically according to the schedule. In this case, the checkbox Enable conference time extension becomes available to allow moderators to extend the event. This action will be accessible in the personal area, real-time meeting management in applications, as well as via a button in the imminent event end notification (if enabled, see below);
- You can enable notifications about the upcoming end of the event (see above) by checking the box Remind me 10 min before the conference ends. The notification time can be adjusted in the dropdown menu. This option is available only for scheduled conferences. All moderators, not just the owner, will receive the notifications.
- conference styling: for any event, you can set a unique background and watermark, and multiple watermarks can be added to different areas of the video layout;
- 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.
- 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.
- Conference location and description.

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. The checkbox **Request email confirmation** requires the user to follow an authorization link in the registration notification email, thereby verifying the authenticity

of the provided email address. Without email confirmation, the participant will not be able to join the webinar.

- 1. In the **Registration form settings** section, you can configure the fields for self-registration of participants in the TrueConf webinar. You can drag the fields with the mouse by pulling the line with the desired parameter and check the boxes for those that are required to be filled out. Configuring these fields is possible *only when creating a conference* and not available during its editing.
- 7. By clicking the **Settings** button, you can add registration fields, but this is *only available when creating a conference*. You can add standard fields to the form or create your own (up to 10) by selecting **Settings** →**Add field**.

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.

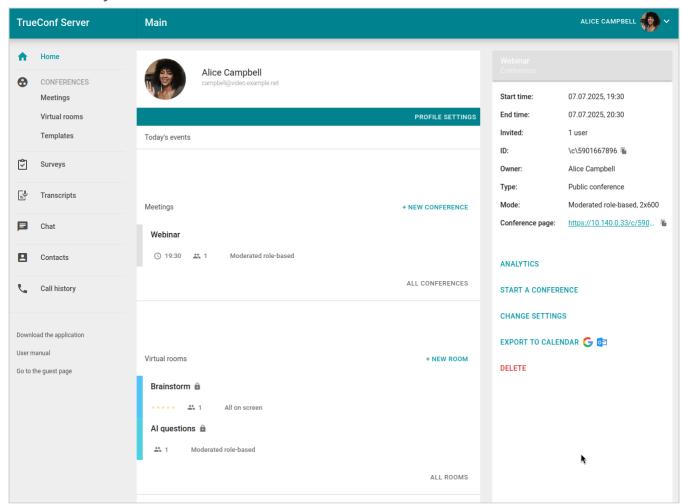
To add a template, use **Create a template** button in the upper right corner of the **Templates** section. You can also save your conference as a template when creating it.

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

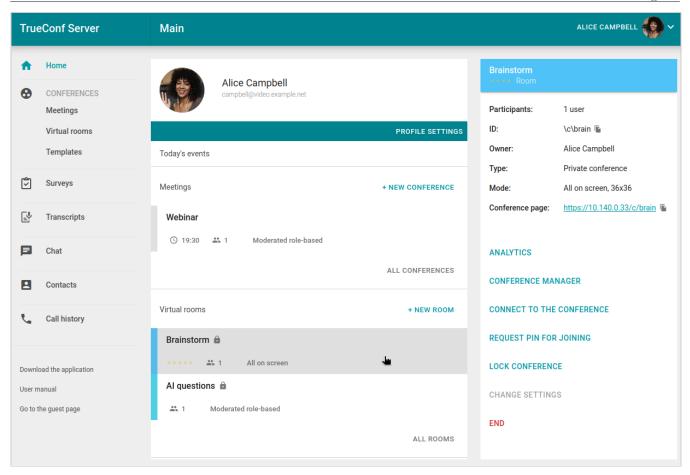
Before the conference starts, you will have access to a number of features in the card of this event (if you are the owner). You will be able to:



- 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**.

This feature is available in one of the following cases:

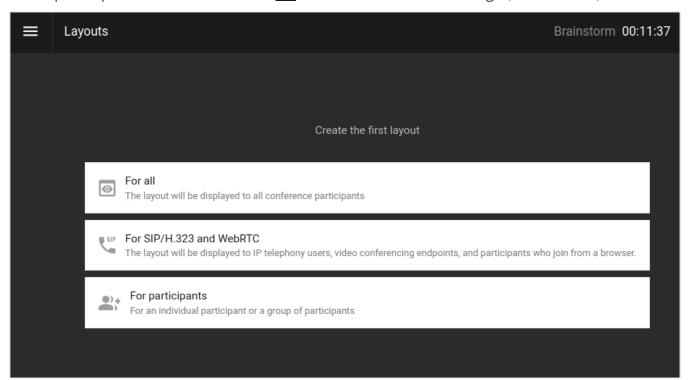
- You are the conference owner.
- · You are a conference moderator.
- You have the operator rights which means that you automatically become a conference moderator.

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 access real-time meeting management, select it from the main page of your personal area under the **Meetings** or **Virtual rooms** section. Then, on the panel that appears on the right, click **Conference manager**.

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 popens the menu where a user can find the list of participants while the button leads 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 this conference already has video layouts, you will see their list:



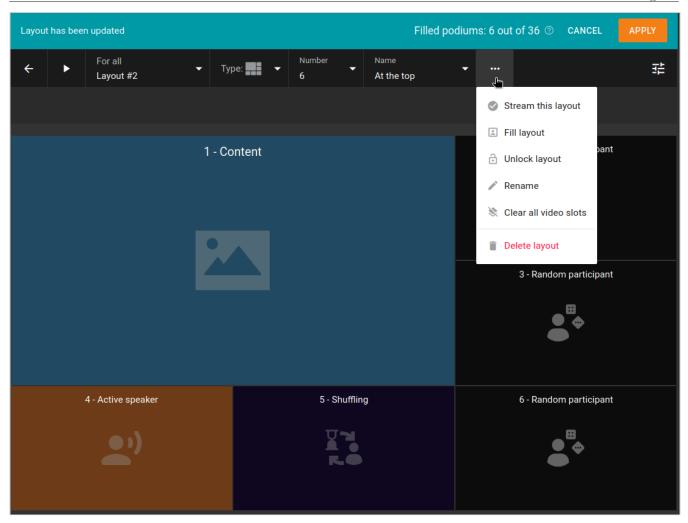
The active video layout will be highlighted with an orange indicator • to the left of its name. To activate a different layout, hover over it and click the • button to the left of its name. To stop broadcasting a layout, hover over it and click • . To edit the slot rotation rules, click •.

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

- for all participants
- for SIP/H.323 and WebRTC users
- individual video layout for a specific meeting participant.

Managing video layouts is not available in video lecture mode.

After that you will proceed to the layout control panel.



Please note that in real-time meeting management, video layouts are not saved automatically; you need to save them manually before returning to the general list.

- 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. You can add a new video layout directly from the editor by clicking on the dropdown list with the layout name and selecting **Add layout**.
- 3. In the **Type** dropdown list, select the video window arrangement in the video layout.
- 4. In the **Number** dropdown list, select the number of video windows in the video layout.
- 5. In the **Name** dropdown list, specify the position of the username in the video window.
- 6. Click the *** button to proceed to the following items:
 - Stream this layout available if the layout is not the main one, sending the created layout to the intended recipients (see layout mode description above);
 - **Fill layout** automatic filling of video slots with participants (if there are more slots, the remaining ones will remain as "random participant").
 - **Lock layout** in this case, participants will be forced to use the specified video layout when it's activated during the conference, and they won't be able to adjust it

locally. This is especially useful for connections via third-party protocols such as SIP/ H.323, as terminals often have limited capabilities for slot management.

- Rename assign an easily recognizable name to the video layout (up to 70 characters) to quickly find it in the general list;
- Clear all video slots completely clears the video layout so you can start filling it again;
- **Delete layout** deletes the specified layout. If it was set as the default for its category (for example, for all), no other layout will automatically become the default upon deletion; you will need to assign a new default manually.

After setting up and rearranging participant video windows in the layout, click **Save** to add it to the list. In the case of a *moderated role-based conference*, listeners added to the layout will automatically be called 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.

İ

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 <u>understand</u> 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 to the layout displaying content shared in a separate stream or a presentation, simply select the desired slot and set its type to **Content**.

9.2.4. Managing participants' audio and video devices

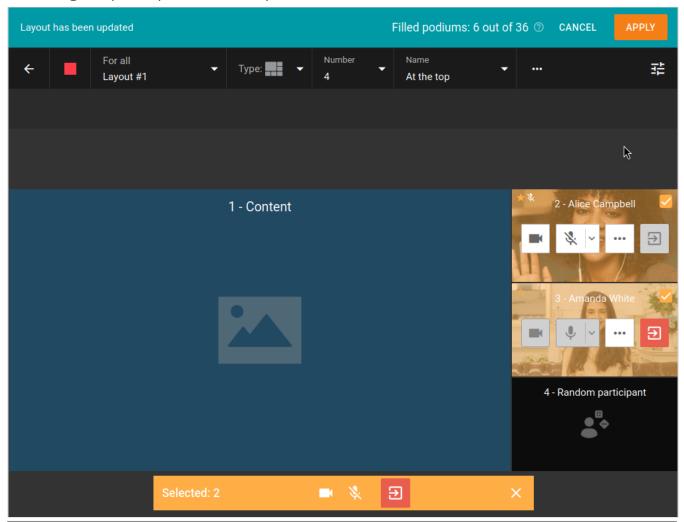
You can manage participants' devices immediately after adding them to the video layout. If the control elements are not visible, enable their display by clicking the button. The following participant control buttons are available:

- enable/disable camera
- 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 audio output channel for this participant (only in a conference with activated simultaneous interpretation 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.

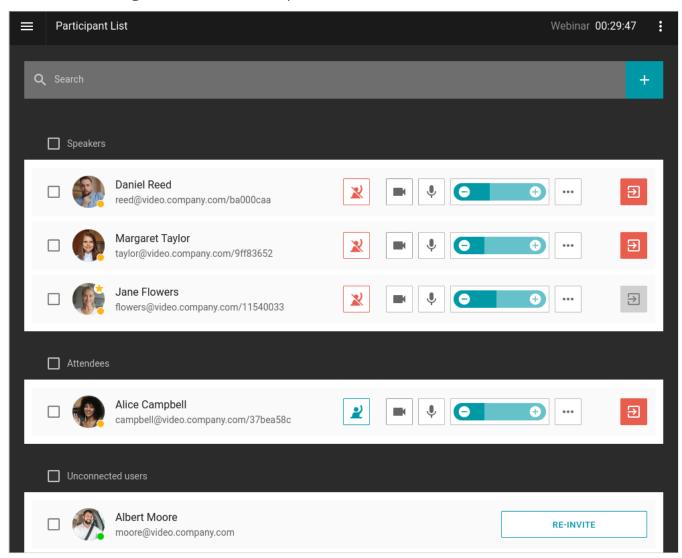


Click in the upper right corner of the conference control panel to hide participant control buttons or to display the list of users not yet added to the video layout. You will have the same options for managing each participant from the list as described above.

9.2.5. List of conference participants

You can also access the full participant list by clicking the button in the top left corner and selecting **Participant List**. Here, you can remove someone from the conference, invite new participants, and manage their devices. The button will be hidden if you have changed the layout but have not saved it.

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.



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

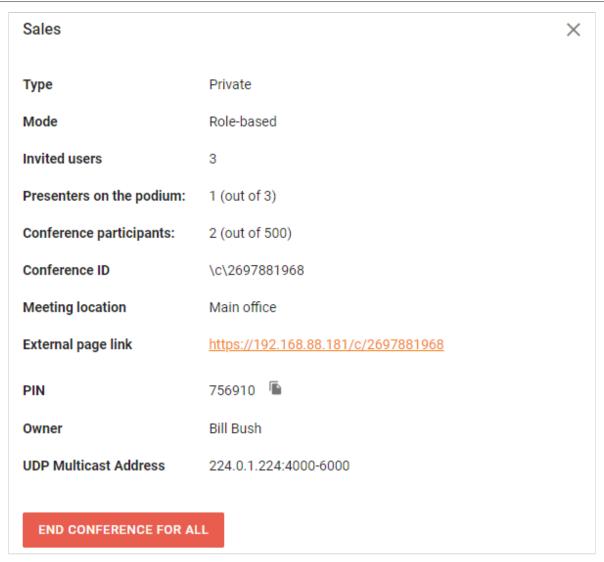
If the option to extend a **scheduled** conference was enabled on the **Additional** tab, all moderators will be able to extend the event duration. This can be done in real-time meeting management in several ways:



- 1. Click the button in the upper right corner and select 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.
- 3. Additionally, the event owner can extend the conference duration by clicking the **Extend conference time** button from the active conference card without switching to real-time meeting management.

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.

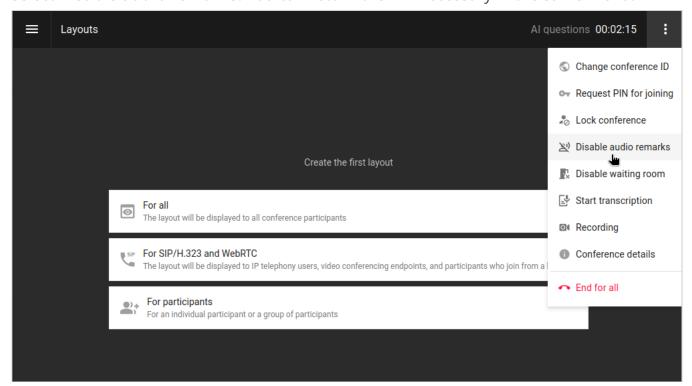
When a conference is locked

- 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. prohibition on sending audio remarks in the case of a moderated role-based conference;

For a conference of the "controlled selector" mode, presenters have the option to disable audio replicas for all participants in the advanced control. To do this, click on select **Disable audio remarks**. You can return them if necessary in the same menu:



9.7. 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.

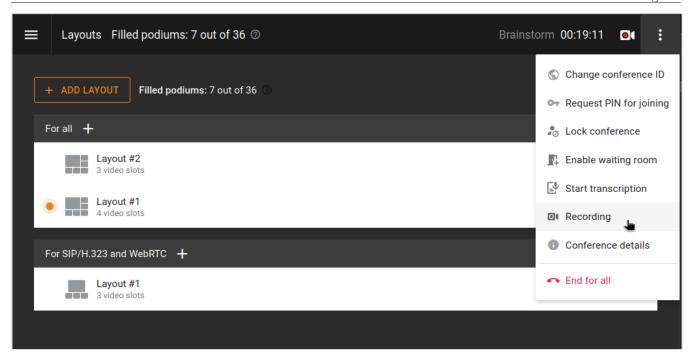


Each time when a conference is ended, the status of the waiting room is reset to the value specified on the **Advanced** tab before the start of the conference.

9.8. 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. Surveys

Users of video conferencing systems from TrueConf can create polls to gather opinions on various topics.

What features does the built-in polling (survey) module offer:

- no association with conferences or chats, polls are conducted independently as a separate entity;
- configuring access to the survey (only for users of your server or for everyone);
- · creating anonymous polls;
- configuring permissions for respondents to view results;
- access to retaking the survey;
- Permission to change responses;
- uploading images as a response option;
- adding images to a question;
- the ability to mark any questions as mandatory so that they cannot be skipped to complete the survey;
- creating survey campaigns to more easily segment results by respondent groups;
- export results as a CSV file.

To create a poll, you need a dedicated permission. You can also manage polls, but only those that you own (where you are the owner), not all polls. You automatically gain ownership of a poll upon creation, and it can also be explicitly granted by the poll's owner or server administrator for another poll.

10.1. Types of questions and limitations

For each poll, you can add a question of one of the following types:

- Short answer a freeform response written explicitly by the user and not selected from options (up to 255 characters);
- Paragraph a free-form response option where you can write more text (up to 4096 characters);
- **Single answer** a question with multiple answer choices, where only one can be selected. When creating the question, you can add one **Other** option.
- **Multiple answers** a question with multiple choices, where you can select more than one option; when creating a question, you can add an **Other** option.

There are also the following limitations on TrueConf's polls:

Maximum number of polls — unlimited.

Maximum number of questions in a single survey -5000.

The maximum number of response options for each question is 20.

The maximum length for a single response option is 255 characters.

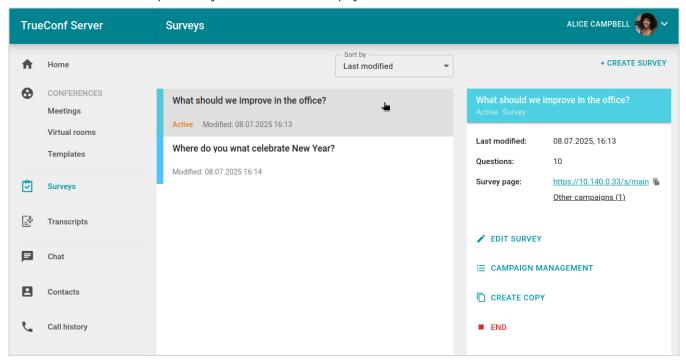
Maximum question text length — 255 characters.

Image formats for uploading to survey text — JPEG, PNG, GIF, BMP.

10.2. Creating and editing a poll

To work with surveys, go to the **Surveys** section of your personal area.

You will see a list of polls (by default, it is empty):



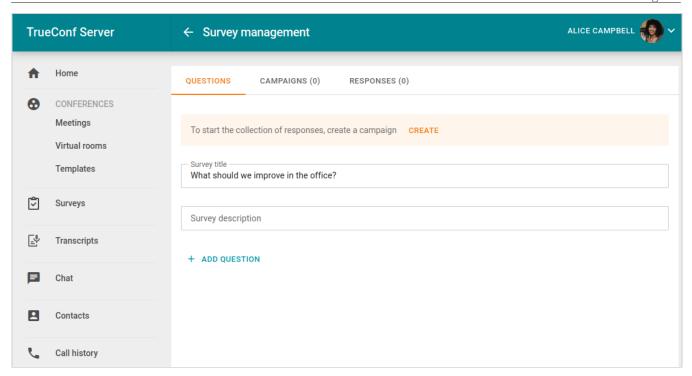
If you select a poll, you will see its main information on the right side of the card: last modified time, number of questions, and a direct link to the campaign (if created).

Poll owner refers to a user of the video conferencing server who has full access to manage the poll and its campaigns. When you create a poll, you automatically become its owner. You cannot transfer poll ownership, but a server administrator can change the owners of polls.

Campaign refers to a specific survey session that allows you to segment participants for analyzing results across different groups. To conduct a survey, it is *mandatory* to create at least one campaign, as participants essentially go through the survey campaign. Each campaign includes all the questions created for the survey and differs only in its link and access settings (see more). Multiple campaigns can be created for a single survey, and there are no limitations on the number of campaigns that can be active simultaneously.

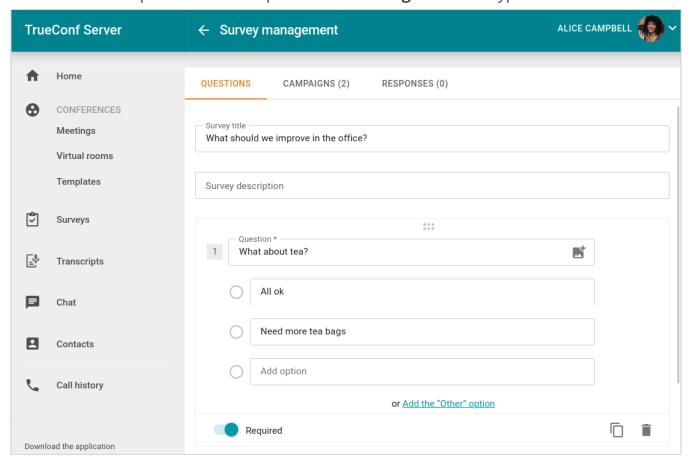
10.2.1. Creating a Poll

To create a survey, click the **Create** button in the general list. The new survey window will open on the active **Questions** tab, where you should specify its title (mandatory), description (optional, will be displayed on the survey page for participants), and below add the desired number of questions:



To create a question, click the **Add question** button at the bottom of the page and choose its type. Then specify the question text and, depending on the selected type, fill in the answer options. If desired, you can add an image to the question text or to any answer option, for instance, to better illustrate the question or to make pictures into answer options. Changes to the question list are saved automatically, ensuring you won't accidentally lose your work on a lengthy survey.

Below is an example of an added question of the **Single answer** type:

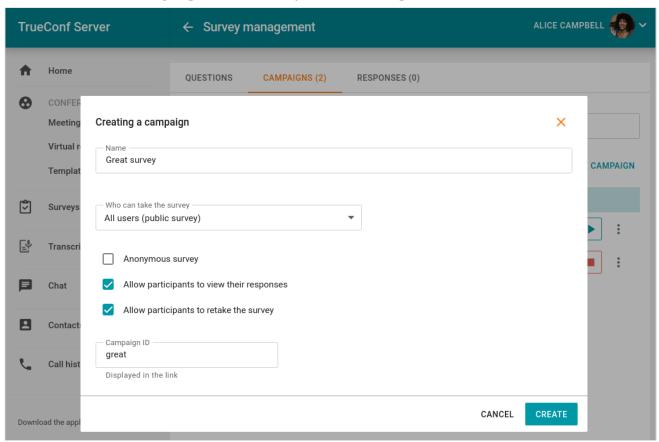


10.2.2. Survey campaigns

To conduct a survey, at least one survey campaign must be created and launched. To do this, go to the **Campaigns** tab. By default, no campaigns are added, and you need to create them manually. If campaigns exist, you will see their list.

10.2.2.1. Creating a campaign

1. Click the **Create campaign** button to open the settings window:

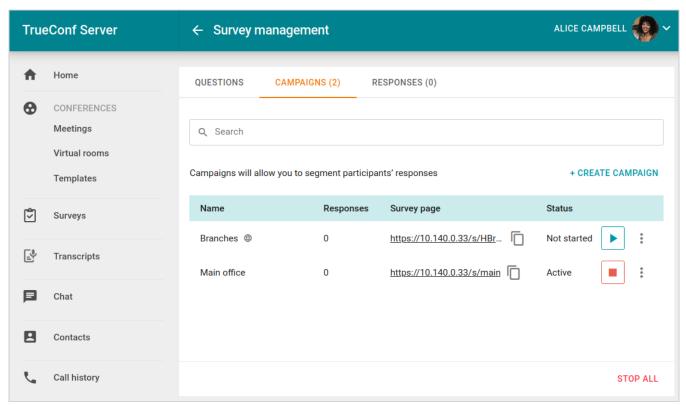


- 2. Enter the campaign name in the **Name** field. It is not visible to participants and is used only for quickly finding campaigns in the list.
- 3. In the **Who can take the survey** dropdown list, select the campaign accessibility level for participants: everyone can follow the link and fill out the survey (public campaign) or only users of your TrueConf Server.
- 4. Check the **Anonymous survey** checkbox if you need to collect anonymized response analytics without attributing them to participants. For an anonymous campaign, the analytics results will be displayed for each answer option in each question without specifying the participant's name. Additionally, no hidden analytics will be stored on the server's database.
- 5. The **Allow participants to view their responses** checkbox will enable participants to see their responses again after submitting the completed data.
- 6. Check the **Allow participants to retake the survey** option to enable participants to submit their responses again.
- 7. To provide participants with a neat campaign link, specify its suffix (the last part of the link that will be appended to your server's address) in the **Campaign ID** field. For

example, if you enter office, the link will be https://example.com/s/office. The ID must be unique within your server.

10.2.2.2. Campaign List

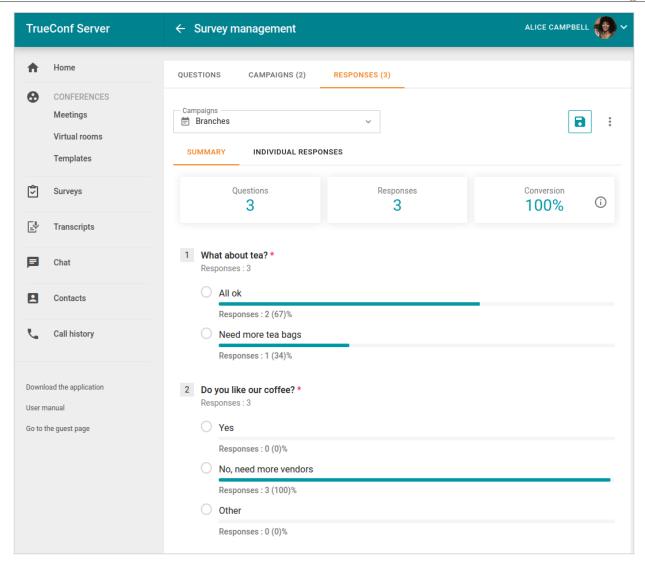
If multiple campaigns have been created, they are displayed as a list with several available actions (public campaigns are marked with the \oplus icon):



- 1. To copy the campaign link, click the \Box button.
- 2. To launch an inactive campaign, click the 🕨 button.
- 3. To stop the campaign, click the button. The survey will be paused, and you can resume it at any time if desired.
- 4. To navigate to the **Responses** tab with the results for the desired survey campaign, click the button in its row and select **View responses**.
- 5. Regardless of the campaign status (active or stopped), you can modify its settings, such as making it anonymous. To do this, click the button and select **Edit campaign**.
- 6. You can delete a stopped campaign, which will also remove all responses provided specifically for this campaign. To do this, click the button and select **Delete**.

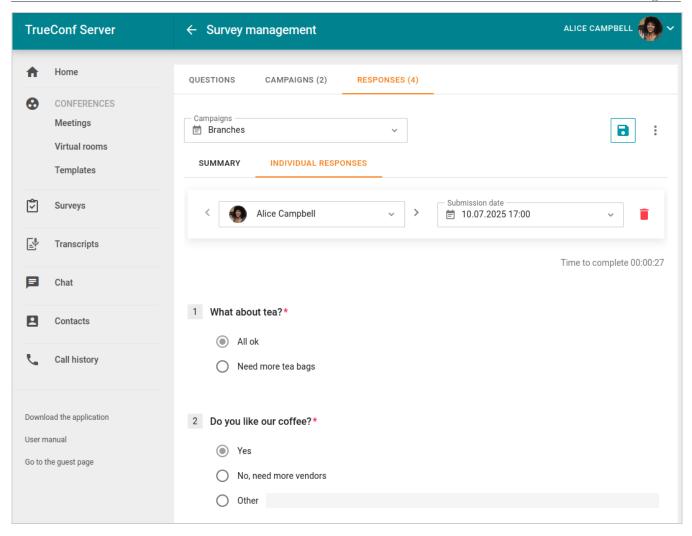
10.3. Survey campaign results

To view the results of survey campaigns, go to the **Responses** tab while editing the survey, or click the **View responses** link in its card in the general list. The opened tab will display the total number of responses from all campaigns:



- 1. In the **Campaigns** dropdown list, select the campaign for which you want to view the summary, and click **Apply**. You can select multiple campaigns to view combined statistics for them.
- 2. The summary of results shows the number of responses, indicating how many users completed and submitted the questionnaire. The conversion rate is also useful, representing the proportion of respondents who filled out the form completely after accessing the survey page.
- 3. To save the responses for one or more campaigns selected from the **Campaigns** list into a .csv file, click the **b**utton.
- 4. To clear the results for the selected survey campaigns, click on the select **Delete all responses**. This will erase all respondent answers collected for the specified campaigns.

By default, the results are displayed under the **Summary** tab. However, you can switch to the **Individual responses** view, allowing you to select a participant to view their specific answers and the time it took them to complete the test:



If the campaign was launched as *anonymous* (see campaign settings), then in the participant list for the **Individual responses** option, names will be replaced with **Anonymous user**.

11. How video layouts work

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.

11.1. 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 smart meeting mode. In smart meeting mode, if the owner has not created custom layouts (and the default layout is used), the owner can pin speakers in specific slots to prevent them from being replaced when they stop speaking. For more details, see the client application documentation.
- **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.

11.2. 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.

11.3. 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.

• There are no other restrictions: the number of video windows starts from 1, and the type of each slot can be changed.

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.

11.4. 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.

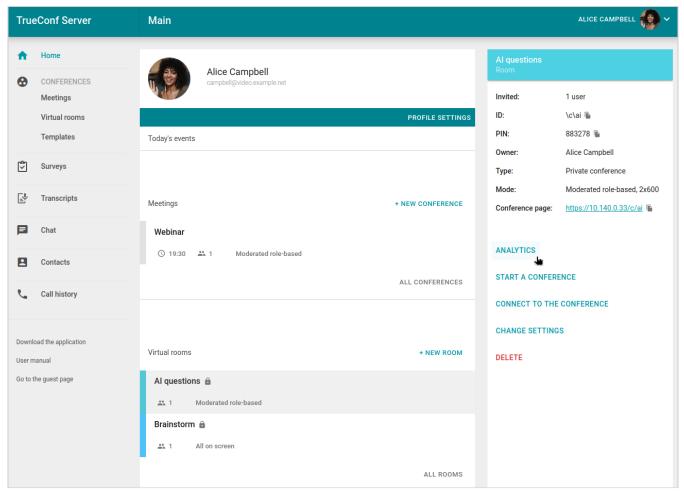
11.5. Changing slot types when switching modes

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):
 - if the layout includes multiple slots of the **Random** type, then first of them will change its type to **Active speaker**
 - if there are no slots of type **Random**, then another slot is randomly selected to change to type **Active speaker**.

12. 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.



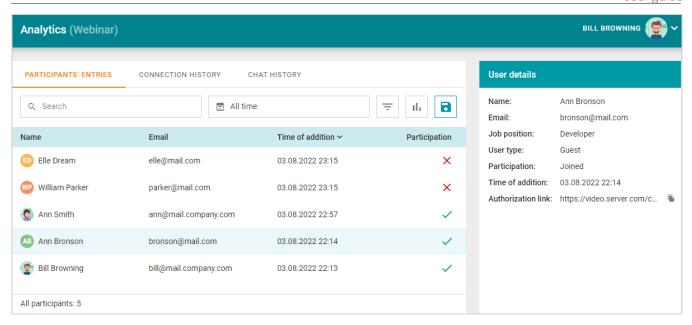
This feature is available for any conference regardless of its schedule mode (a virtual room or a scheduled conference) and its status (ongoing or inactive).

12.1. 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:

12.1.1. 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:



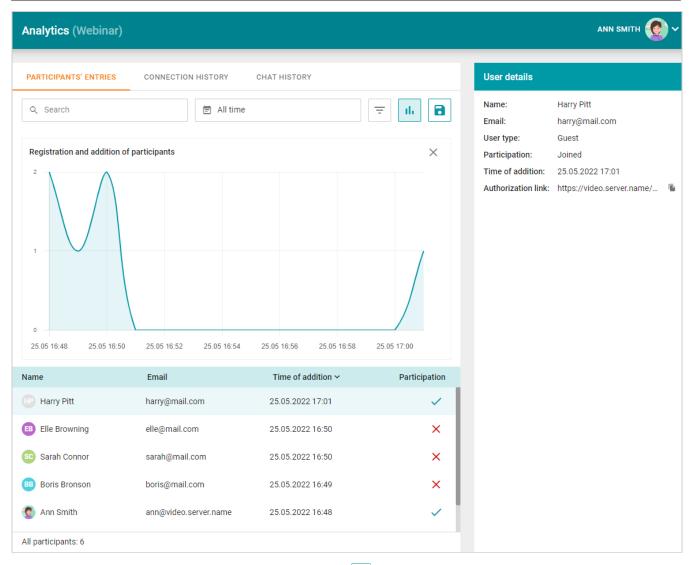
If you select a participant in the list, you will be able to view information about this user. For example, here, we have selected the user named *Ann Bronson*.

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 select acustom time interval by clicking on the select acustom.

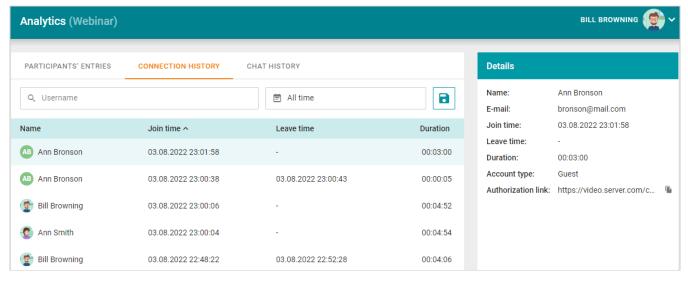
To display the chart showing when users were added to the list of participants click on the button. You will be able to apply the following filters:



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.

12.1.2. Connection history

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

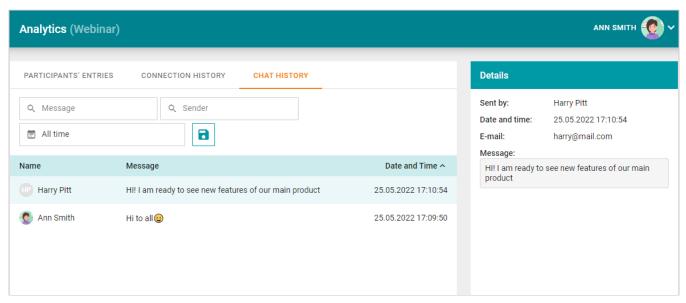


You will see information about every connection and exit event. The above examples shows that *Ann Bronson* and *Bill Browning* joined the conference two times. It is possible to

search for participants by name and select the time interval for filtering and saving data to a **.csv** file.

12.1.3. View chat

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



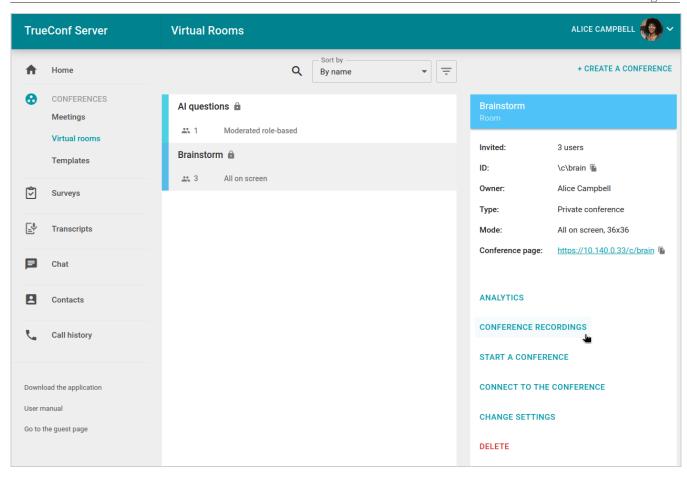
Messages can be filtered by words or phrases, sender, and the time of sending. It is also possible to save messages to a **.csv** file.

12.2. Conference recordings

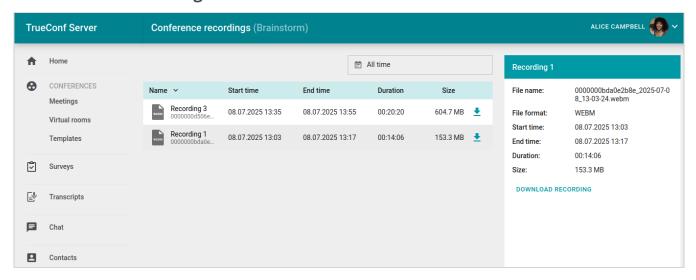
As the conference owner, you will also be able to download video recordings of the meeting saved on TrueConf Server.

* 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 $\stackrel{\blacksquare}{}$:



75