

Deployment Guide



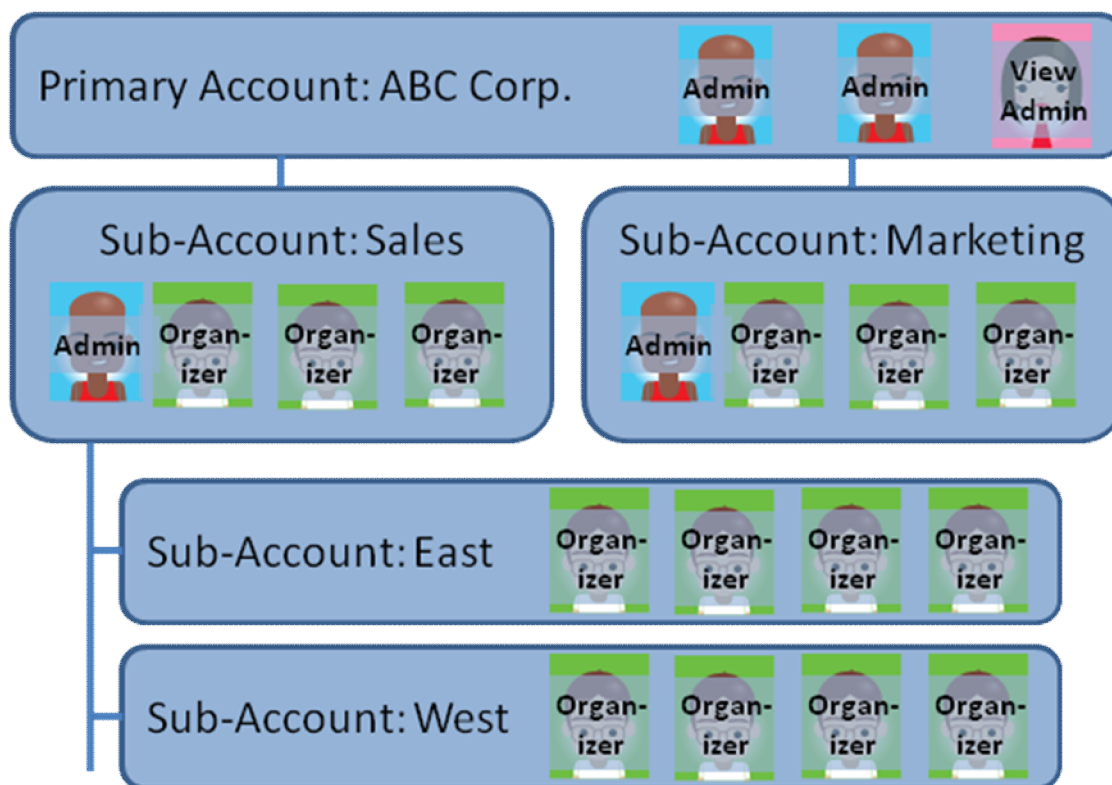
November, 2010

This Deployment Guide is for IT Professionals and Administrators responsible for an Organization's conferencing needs. This Guide will:

- Show you the features and capabilities of the ZipDX Administrative Interface
- Give suggestions for rolling out ZipDX to a group of users
- Provide details on using ZipDX when an assistant schedules on behalf of an executive
- Overview some of the reporting tools available for administrators
- List some common conferencing issues and their resolutions

In addition to this Deployment Guide, please review the companion *ZipDX User's Guide* for an overview of ZipDX from the perspective of the end-user.

ZIPDX ADMINISTRATIVE INTERFACE: Almost all aspects of ZipDX can be administered on-line. There are a few key concepts to ZipDX administration, illustrated and described below.



Your organization has a Primary Account, which consolidates all of your conferencing charges and is the “master” in terms of system usage and restrictions. Optionally, you can set up any number of sub-accounts, and even sub-sub-accounts. These can be used at your discretion for:

- Organizational Divisions or Groups (Marketing, Sales, Engineering, Support)
- Locations (Ann Arbor, Omaha, Fresno, Shannon, Bern, Wellington)
- Projects or Clients (Remodel, Product Rollout, Year-end Audit, Secret Merger)

By listing an E-mail address on an account, you can give an individual authority at any of several different levels, as shown in the table below:

Designation	Host Conferences Charged to this Account	Authorize Others on this & Sub-Accounts	View Account & Sub-Account Activity On-Line	Receive Monthly ZipDX Invoice & Reports
Organizer	Yes	No	No	No
View Admin / None	Yes	No	Yes	No
View Admin / Summary	Yes	No	Yes	Summary
View Admin / Full	Yes	No	Yes	Details
Admin / None	Yes	Yes	Yes	No
Admin / Summary	Yes	Yes	Yes	Summary
Admin / Full	Yes	Yes	Yes	Details

An individual does not need to be listed on an account to PARTICIPATE in a ZipDX conference call; they only need to be listed in order to schedule (“organize”) a call. If an individual is listed on multiple accounts, they can choose which of those accounts will be charged for each of their meetings.

Most people need only be listed as an “Organizer.” Organizers can always view all of their OWN conferencing activity on-line, even without administrative access. The other designations might be useful as follows:

- View Admin / Full: Accounts Payable, so they can receive (& pay) the ZipDX monthly invoice and allocate charges accordingly.
- View Admin / None: Support staff, so they can review conference histories.
- Admin / None: Department administrators so they can manage (add and remove) users for their own group (especially handy to delegate administrative chores for a sub-account).
- Admin / Summary: IT staff responsible for managing conferencing; monthly E-mail summaries provide usage and billing highlights.

Note that administrative access applies to the listed account, as well as any sub-accounts.

Users & Administrators

Email addresses of all Users and Admins

Note: You must click on the "Save" button for participant changes to take effect. (Explain)

Add

	Email	Admin / Reporting	Status
(remove)	dfrankel@zipdx.com	Admin / Summary	Registered
(remove)	asolomon@zipdx.com	View Admin / Full	Registered
(remove)	mrichards@zipdx.com	Organizer	Registered
(remove)	mquayle@zipdx.com	Organizer	Registered
(remove)	rjohnson@zipdx.com	Organizer	Not Listed

Reserved Telephone Numbers.
Enter common organizational numbers that should not be assignable to any individual. One per line.

4045551200
4045551201
4045551202

Registration: Before an individual can exercise Admin privileges associated with an account, they must be “registered.” When you add an unregistered user to an Account, ZipDX sends an E-mail to the listed address; the user must click a link inside that E-mail, and then fill in a very brief form to complete their ZipDX profile. They can then log in to www.ZipDX.com with their E-mail address and the PIN or web password they selected. They can organize meetings and, if listed as an “admin,” can access the “Accounts” tab for administrative functions.

If an individual is not already registered in ZipDX when you add them to an account, ZipDX will immediately send an E-mail to start the registration process. If they ARE already registered, it will not send an E-mail; you can communicate with them separately regarding their account status.

Reserved Telephone Numbers: If your telephone system has general “trunk telephone numbers” that are shared by all employees, you can list those numbers in this box. That will prevent any single individual from “claiming” one of those numbers as their own; this prevents potential confusion when ZipDX tries to automatically identify callers using Caller-ID.

Account-Level Restrictions: ZipDX provides a number of administrative controls that you can set at the account level. These will apply at the sub-account level as well (although you can implement tighter restrictions there if you wish). The items in “Info & Settings” can help prevent fraud and abuse:

Admin Suspend	<input type="checkbox"/>
Account Name	Engineering Department
+ Maximum per-minute surcharge for dial-out and call-me calls (Limit is \$0.75)	0 . 75
+ Maximum number of connections in a single conference (Limit is 50)	50
+ Maximum duration (in minutes) of a conference (empty for no limit)	240
Balance Limit (in \$)	250.00
Balance (in \$) (negative indicates credit)	0.00

The “Conference Limits and Policies” affect how ZipDX behaves for your Organizers:

+ Recording Notification	Always Announce When Recording
+ Recording	Conference Organizer Decides
+ Transcription	Scribble Only
+ Recording/Transcription Minimum Save Days (empty for no limit)	
+ Recording/Transcription Maximum Save Days (empty for no limit)	60
Suppress conference charges column in the Organizer's post-conference summary?	no

With “Always Announce When Recording” selected, ZipDX will automatically play a notification to attendees that the call is being recorded. Otherwise, it would be up to the Organizer to make such a notification. Laws mandating that parties on a telephone call be informed about recording vary, depending on the jurisdiction of the call (in-state, state-to-state, and foreign). As an administrator, you can force call calls to be recorded, disable recording entirely, or leave it up to the meeting organizer.

The “Transcription” setting determines what transcription options are made available to Organizers.

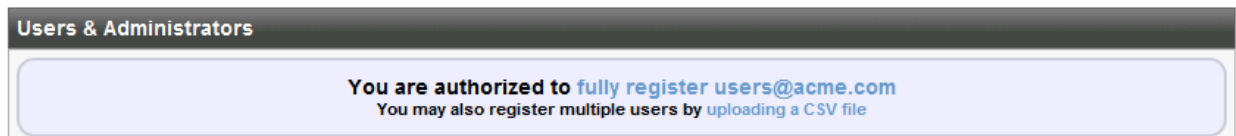
If you set the recording “minimum save days,” ZipDX will prevent the Organizer from deleting the recording (and/or transcription) prior to that length of time. If you set the “maximum save days,” ZipDX will automatically delete the recording after that number of days. These settings can be useful for compliance with legal requirements or company policies.

ZipDX E-mails a conference summary to the meeting organizer as soon as the meeting ends, and also makes this information available to the Organizer on-line. You can choose whether or not these summaries include the charges associated with the meeting. (You may determine that the distraction or disclosure of the cost data is not appropriate for Organizers. If you select Yes, the summary information will still be available but the charge details will be omitted. The administrative interface will still show charges.)

ROLLOUT SUGGESTIONS: Step through this checklist as you plan the rollout of ZipDX to your organization:

- Experiment with ZipDX yourself, so you get familiar with its interface and validate how it works with your company's telephone, E-mail and calendaring technologies.
- Determine what sub-account structure you are going to use (if any). Subaccounts will be particularly useful as your user base grows, and they allow you to delegate administrative duties to others. Set up the sub-accounts (with the parameters and restrictions of your choosing) and add the appropriate individuals as Administrators.
- Send a notification to your team, letting them know that you are transitioning to ZipDX. You might include the ZipDX User's Guide to help them get started. Encourage people to list their office, home and mobile numbers in their ZipDX profile so that they get the most out of the system's ease-of-use features. Suggest that they have a brief "practice call" with colleagues to explore ZipDX capabilities (like the on-line dashboard) and know what to expect.
- Add team members as "Organizers" to the appropriate sub-accounts. ZipDX will then send them an E-mail with their initial PIN and Conference Code. There is also a link allowing them to finish their registration (if they haven't registered already) and customize their profile.

REGISTERING OTHERS: Typically, each ZipDX user completes his own registration. But it is possible for administrators to register users in a specific domain (such as "abc.com") – contact support@zipdx.com to get this enabled for your account, then look for this section on the Account Settings form:



Now, click the "fully register users@..." link. Fill in the new user's email address, and their name and time-zone; choose a PIN and (if desired) a web password for them. Click REGISTER – the data will be saved and they'll be added as an Organizer to the account (or sub-account). You are now logged in with their identity, and can enter phone number(s) and set up meeting templates for them. When done, look at the very top left of the screen for a link to log back in with YOUR OWN identity.

If you have many users to register, you can also import a CSV file into ZipDX. Click the "uploading a CSV file" link to see more details about this process, which can auto-populate email address, name, timezone, phone numbers, etc. for each user.

When you set up users using either of these approaches, you can be listed as the "Admin User" for each of your new registrants. As the Admin User, you can easily "log in" to these other identities in order to provide support (view active, pending, and completed meetings; adjust profile settings, etc.). Do this by logging in as yourself, then clicking the Profile tab, then "Other Profiles." You'll then see a list of all of the identities for which you are the Admin User, and a "Login As..." link for each one.

CONFERENCE CODES: One of the most-liked attributes of ZipDX is the patented "identity conferencing" technology that allows attendees to participate in meetings without having to manage a bunch of convoluted codes. But your team may be quite used to "code-based conferencing" and it might be easiest to give people the option of using ZipDX that way.

We normally suggest that people chose for their PIN a confidential number that they already know, such as their spouse's mobile number, or the phone number they had as a child. This would be another good choice here.

Note that code-based conferencing is much less secure than ZipDX identity conferencing. You may want to transition to identity conferencing to achieve that benefit as well as the added convenience.

USING ZIPDX ON BEHALF OF OTHERS: If you have executives that rely on support staff (a “delegate”) to manage their conference calls, ZipDX has some features to facilitate this.

As described above, an administrator can set up a ZipDX registration for the executive, set up the executive’s phone numbers and meeting templates, and be designated as that executive’s “AdminUser.”

When the delegate schedules meetings for the executive using the electronic calendar (for example, via Outlook/Exchange), the delegate does so “on behalf of” the executive. The meeting invitation comes from the executive, so ZipDX will treat the executive as the organizer of the call.

The delegate can enable various settings in the executive’s ZipDX profile, in the “Advanced Preferences” section:

In particular, note these items:

- When someone else invites the executive to a ZipDX meeting via the electronic calendar (item 4), ZipDX normally sends an additional E-mail detailing the invitation; you can reduce in-box clutter by checking this box.
- When a ZipDX meeting is scheduled via the electronic calendar, ZipDX sends a confirmation back; in addition, when a meeting ends, ZipDX sends an E-mail summary (item 7). You can direct these messages to the delegate, rather than to the executive, with this setting.

You may also find it useful to include the delegate as an alternate “host” on some of the executive’s meeting templates. This allows the delegate to dial into the calls, perhaps to act as a facilitator or to take notes.

REPORTING: ZipDX provides several different ways to access conference call histories. As soon as a call is completed, the history is available on-line.

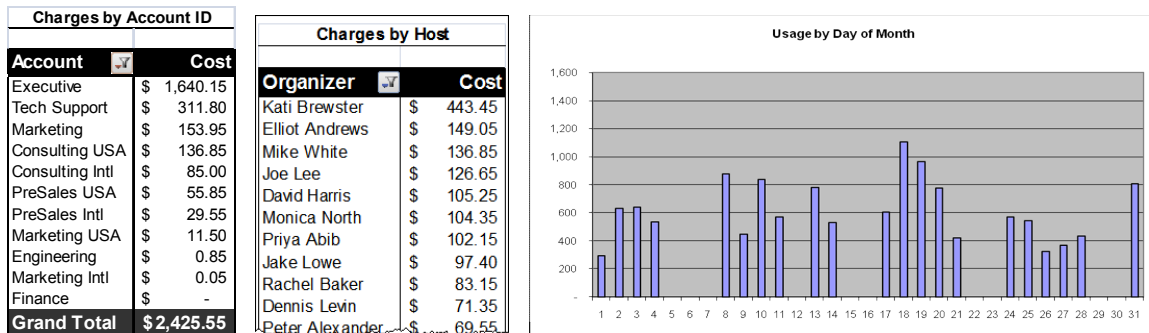
Individual organizers can see all of their complete calls on-line, at the bottom of the “Home” tab when logged in at www.ZipDX.com.

Account Administrators can view call history by account and sub-account. Clicking on a dollar figure on the “Accounts” tab will show the high-level summary for that account (or sub-account). From there, you can “drill down” for details on particular conference calls or sub-accounts.

In the accounting view, charges are grouped by “Billing Cycle”; the initial view shows the current billing cycle (not yet invoiced), and all previous cycles are selectable from a drop-down box.

The monthly invoice, delivered via E-mail, also shows charges; the level of detail presented to each recipient is selected in the Accounting interface (“Admin / Summary” vs. “Admin / Detail”).

You can also download completed call data as a “.csv” file, and then process that using your own tools. ZipDX provides an example Excel spreadsheet which can import this file. It produces a variety of summary charts:



The spreadsheet also produces a table which lets you sort the data by a number of different criteria:

	A	B	E	F	G	H	I	J
	Date	Time	Organizer	Title	Duration	Cost	Account	Details
1	Thu, Sep 10	16:42	James Woodrow	Meeting	367	\$35.40	Consulting Intl	Details
3	Thu, Aug 13	17:00	Mike White	AR Review	212	\$20.40	Consulting USA	Details
4	Wed, Aug 19	1:59	Mike White	Trip Prep	209	\$20.80	Consulting USA	Details
5	Thu, Sep 03	11:21	David Harris	General Meeting	200	\$47.25	Tech Support	Details
6	Tue, Sep 08	16:07	James Woodrow	Meeting	182	\$16.30	Consulting Intl	Details
7	Tue, Aug 18	7:02	Mike White	Rollout Plan	177	\$18.30	Consulting USA	Details
8	Tue, Aug 18	2:14	Mike White	Rollout Plan Part B	174	\$15.05	Consulting USA	Details
9	Tue, Sep 08	14:59	Alphie Baker	Upgrade	170	\$16.55	Consulting Intl	Details
10	Wed, Aug 19	6:56	Mike White	Rollout Plan Part C	166	\$25.75	Consulting USA	Details
11	Wed, Sep 02	7:33	Fred Lathrop	Meeting	148	\$13.75	PreSales USA	Details
12	Thu, Aug 20	10:58	Ken Sussman	Group Status	145	\$40.20	Tech Support	Details
13	Tue, Aug 18	5:59	Rob Grossman	Meeting	131	\$23.95	Executive	Details
14	Fri, Sep 04	10:58	Priya Abib	Escalation Status	126	\$38.05	Tech Support	Details
15	Thu, Aug 20	6:52	Mike White	Rollout Plan D	125	\$12.50	Consulting USA	Details
16	Thu, Aug 20	12:01	Jake Lowe	Meeting	121	\$18.10	Executive	Details
17	Fri, Aug 21	5:59	Jake Lowe	Meeting	119	\$17.60	Executive	Details
18	Thu, Sep 03	9:05	Jeff Dubois	Meeting	116	\$11.25	Executive	Details
19	Mon, Aug 31	10:29	Mark Peterson	Advertising Strategy	113	\$15.10	Marketing	Details

The “Details” link on the far right gives you instant on-line access to the full details of that particular call.

The sample spreadsheet is available from the “FAQ/Support” section of www.ZipDX.com under the “Resources” topic.

DEPLOYMENT ISSUES & RESOLUTIONS

Multiple E-mail Addresses: ZipDX identifies meeting attendees by E-mail address. If individuals in your organization routinely use different “aliases” (such as bsmith@abc.com, bob.smith@abc.com, and bsmith@abccorp.com) it is important to “teach” ZipDX about those aliases so that they can all be associated with a single profile. From the ZipDX Profile tab, there is an “add another” link next to the E-mail address(s); users with multiple E-mail aliases should click that and follow instructions.

SPAM: ZipDX sends important communications via E-mail. Corporate and individual spam filters should be set to allow messages from “zipdx.com”. Also, ZipDX sends E-mail “on behalf of” meeting organizers, and this sometimes creates conflicts with some E-mail systems (particularly some Lotus Notes installations, but also some others). If ZipDX sends a message to sue.hilton@abc.com and marks it as coming “from” bob.smith@abc.com, it may get rejected because the message originates outside the ABC firewall. This is easily rectified by checking a box in the Advanced Preferences section of the Profile tab (see image on previous page); ZipDX will then set the “from” address to its own. If this flag is set on an Administrator’s profile, it will automatically be set when ZipDX subsequently creates profiles as that Administrator adds others as Organizers to an account.

Mailing Lists: Sometimes an organization will set up a mailing list (or “group alias”) within their E-mail system. For example, sales@abc.com might be a list that includes all of the salespeople. If you include sales@abc.com in a ZipDX meeting invitation, ZipDX will think that address refers to a single individual, and it will reference a single profile with that label. Most calendaring systems have a way to address this. When you include a mailing list on a meeting notice in Outlook, a small “+” will appear next to the address. Click on the “+” and it will “explode” the list so that all of the individual names are displayed. Edit the list if you wish, and then send it; this way, ZipDX will get the full list of participants.

Conference Rooms: You may have conference rooms that are typically included as “resources” in a meeting notice. If you wish, you can assign an E-mail address to your conference room and include it as a “participant” in a ZipDX meeting. This allows the conference room phone to be automatically recognized when participants dial in from that room, or you can even enable ZipDX to call the conference room at meeting time. If you set the “display name” of your resource to “Board Room (zx:boardroom)” then ZipDX will add boardroom@abc.com as a participant in your meeting.

Charging to Projects: Some organizations need to charge conference calls back to specific projects. You can create separate sub-accounts for each project; list as organizers in each sub-account the individuals that are authorized to charge to that project. Then, each Organizer can create a Meeting Template for each of their projects; there is an Account drop-down box in the Template where they can designate the appropriate account. They might create templates called Project1, Project2, and Project3. Then, when setting up meetings, instead of inviting meeting@cal.zipdx.com they can invite project1@cal.zipdx.com and the meeting will be charged to the appropriate account.

Missing Participants: Occasionally, a key attendee will be missing from a conference call – they forgot about it, or they can’t find the invitation with their credentials to get into the call. The easiest solution is for the meeting Organizer (or an alternate Host) to DIAL OUT to them from the ZipDX meeting itself. This can be done via the ZipDX dashboard via the DIAL OUT menu item. Or, from the phone, dial *98, followed by the phone number (1, area-code, then number) followed by #. The dialed number will immediately become part of the conference. If you reach voice-mail, dial *991 to disconnect the call.

Noisy Calls: Very infrequently, a conference call will suffer from noise or echo. The easiest way to address this is with the ZipDX dashboard. Highlighting will show which attendees are contributing audio energy to the call; the MUTE option can be used to silence the offender. Or, the Organizer (or alternate host) can dial *961 to mute all participants. Then, individuals wishing to speak can dial *61 to un-mute themselves.

Fraud: Telecom fraud is a problem for service providers like ZipDX and our customers. The unique security features of ZipDX, including identity-based conferencing, go a long way to limit the potential for fraud. Following these steps will minimize your exposure to fraudulent charges:

- Use non-obvious PINs and conference codes. Avoid repeating digits or simple sequences or patterns.
- Encourage strong web passwords. ZipDX lets you use your PIN as your password for www.ZipDX.com. But PINs are numeric, and can be easier to guess. You should opt to use a more sophisticated password for web access.
- Review call summaries. ZipDX E-mails a summary to the organizer (or delegate) as soon as the conference ends. If you did not plan the call, or if you see participants that don't belong, investigate.
- Set account limits. Hacking conferencing accounts for access to international dialing is the most common motivation for fraud. If you are not conferencing with overseas colleagues, set your per-minute surcharge limit to 0. Otherwise, set it only as high as necessary to reach your intended participants.
- Monitor your account. Look on-line and at your monthly invoices to make sure there are no unexpected charges.

At any time, you can contact support@zipdx.com for help with suspected fraud. Or for urgent needs, feel free to call us at +1 888 ZIPDX LLC (+1 888 947 3955).