

User's Guide



December, 2013

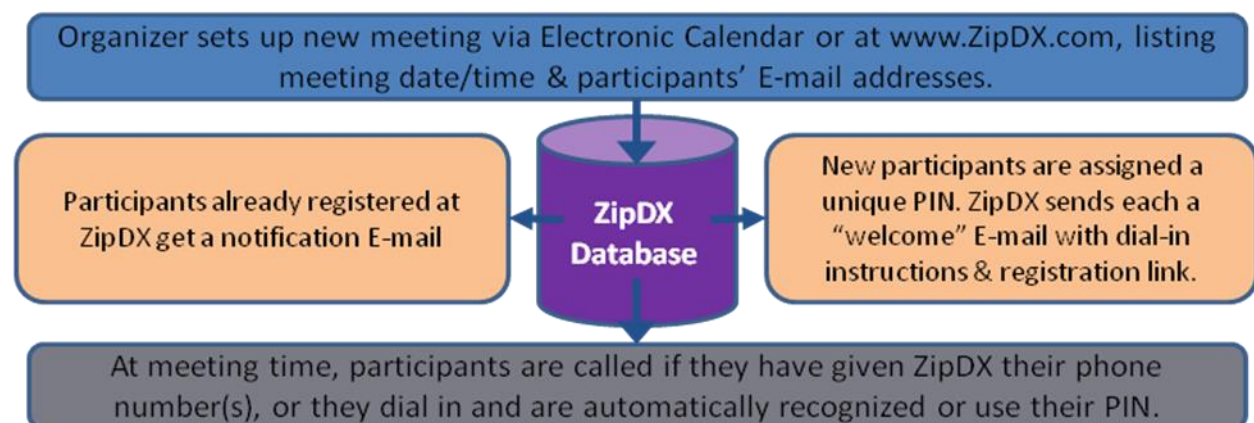
This User's Guide will introduce you to ZipDX and help you get started:

- Participating in conferences to which you are invited
- Setting up conference calls as a Meeting Organizer
- Accessing ZipDX Internationally (and Other Frequently Asked Questions)

HOW ZIPDX WORKS: ZipDX allows a group of colleagues to meet via the telephone (audio-conferencing) and also via the web (WebSharing). With most audio conferencing systems, you dial a phone number at the appointed time, enter a code that you've been given, and all of the participants are "bridged" in a virtual meeting room.

ZipDX can work that way, too, but it has unique "identity-based conferencing" features that will make your meetings more convenient and more secure. With these special features, we've virtually eliminated the serious of cumbersome codes associated with other conferencing services. Welcome to "No-Codes Conferencing."

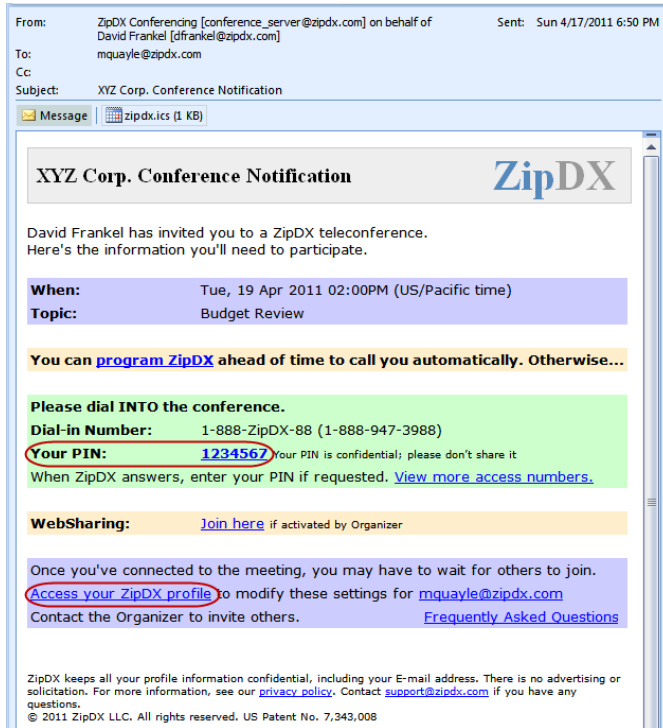
- ZipDX works with electronic calendaring programs (like Outlook, Lotus Notes, Google Calendar, Zimbra) so that it can know who is supposed to be in what meeting when.
- Each individual involved in a ZipDX conference can have a ZipDX profile keyed off an e-mail address. ZipDX can learn your phone numbers, remembers your spoken name, and records various other preferences. Each person also has a unique, confidential ZipDX PIN (Personal Identification Number).
- At meeting time, ZipDX can call you and put you right into the proper conference. Or, you can dial in, and ZipDX will recognize you by your phone number. If ZipDX can't figure out who you are, you can enter your PIN.
- When meetings are set up with the calendar interface and each participant is listed, the meeting is secure; only those that are invited will have access to it.



Setting up a ZipDX profile is optional for participants. It only takes about two minutes. After that, you'll enjoy these benefits whenever your meetings are set up using ZipDX identity-based conferencing.

TIP: When visiting the ZipDX web site, you'll see "([Explain](#))" links on some of the pages. Just move your mouse over these links to get additional help.

PARTICIPATING IN A MEETING: When you are first invited to a ZipDX meeting, you'll get a "Welcome" E-mail from ZipDX with instructions on how to join:



If you wish, just note this information and, at meeting time, dial the listed number and enter your PIN. ZipDX will send you a reminder E-mail a few hours before the meeting.

The first time you dial in for a ZipDX meeting, after you enter your PIN, the system will ask you to record your name. Usually it will also give you the option of storing your phone number so you can be automatically recognized the next time you call in. You can even have ZipDX call you at that number for subsequent meetings. When you're invited to another ZipDX meeting, all this information will have been saved, and even your PIN will stay the same until you choose to change it.

To take advantage of additional ZipDX features, you should UPDATE YOUR PROFILE. Click on the link inside the E-mail to go to your profile page at the ZipDX web site.

If you use MORE THAN ONE E-MAIL ADDRESS, you can link them all at ZipDX.com. This is important because otherwise the system will think that mquayle@zipdx.com and mquayle@zipdx.net and michael.quayle@zipdx.com are three different people.

Remember that ZipDX uses your personal information ONLY to facilitate conferences. We keep the addresses and phone numbers you give us confidential. We do not sell information or accept advertising.

ORGANIZING A MEETING: Organizing a ZipDX Meeting is a snap once you've dealt with a few prerequisites:

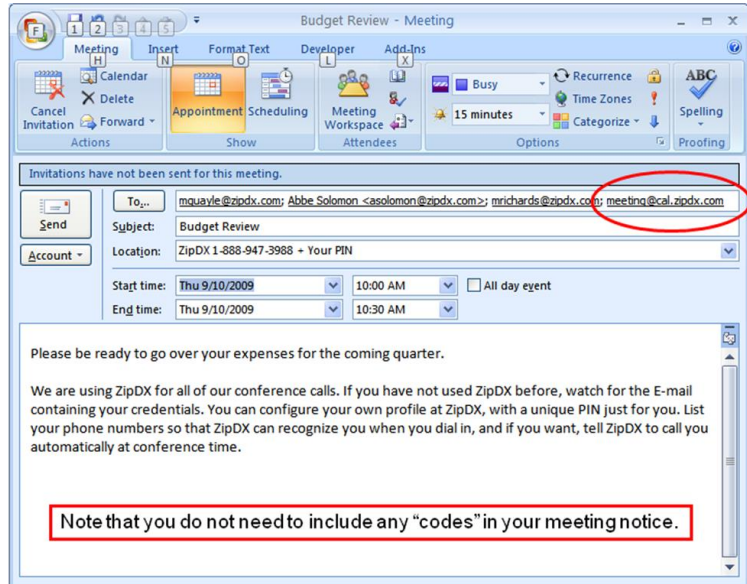
- You must be listed as an "Organizer" (or "Administrator") on a ZipDX account. When your meeting ends, the charges will be posted against that account. (Contact your Account Administrator – probably your IT department – for help getting authorized.)
- You must have completed your ZipDX registration, so that the system can validate your E-mail address and knows your name and timezone.

The easiest way to set up your meeting is to use your Electronic Calendar. Typically, you would send out a meeting notice to all of your participants to reserve the date and time for your meeting. Just add ZipDX as a "participant" so it, too, can learn about your meeting plans.

Use this address: meeting@cal.zipdx.com.

When ZipDX gets your meeting notice, it will store all the pertinent information in its database, and will E-mail your participants instructions for accessing the meeting. See the example text above that you can include in your notice. You will also immediately get a “confirmation E-mail” back from ZipDX.

If you make a change to the meeting using your calendaring program, make sure to choose the “Send to ALL Participants” option so that ZipDX will learn about your changes. Also note that ZipDX can schedule recurring meetings using the options that are available in most E-calendaring systems.



Create a Conference

Date/Time

Conference start time: Oct 14, 2010 12:00 PM Timezone: US/Pacific

Settings

Topic: Meeting Account: ZipDX Advisors

Conference Code: (optional) (Explain)

Participants

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

Email	Host	Status
(remove) mquayle@zipdx.com	No	Registered
(remove) asolomon@zipdx.com	No	Registered
(remove) bthompson@deluxewidgets.com	No	Not Listed

Participants can invite others? Yes, all participants can invite others

Meeting Type: Audio & WebShare (Explain)

Project Tracker: (optional) (Explain)

Organizer: dfrankel@zipdx.com

Audio Features (hide)

Play Entry and Exit Chimes? Yes

Announce Participant names? No, do not play names

You can also schedule meetings at the ZipDX web site:

Just log in at www.ZipDX.com and use the “Create a Conference” link.

ZipDX allows you to customize the features that will be active in any given meeting, such as the playing of chimes and name announcements as people come and go, or whether the meeting is automatically recorded. You can do this when you create a meeting at the web site, or you can create conference TEMPLATES for subsequent access.

For example, you can create a template called “Staff Meeting” that has a specific group of feature settings. When you want to invoke those settings using your E-calendaring program, instead of including “meeting@cal.zipdx.com” use “staff_meeting@cal.zipdx.com”.

Note that the ZipDX web site will always let you review your “Pending Meetings” and show you your conference history.

PRE-REGISTERING PARTICIPANTS: When you invite participants to their FIRST ZipDX meeting, they may be a little perplexed, because ZipDX works differently from systems they’ve used previously. You can help them by storing profile information in the ZipDX database on their behalf, BEFORE you issue your meeting invitation. This will allow ZipDX to call them at meeting time – a huge convenience!

After logging in at www.ZipDX.com, look for the “Pre-register a Participant” link in the upper right of your HOME page. After entering your participant’s email address (twice), you’ll see the form shown below. Fill in the requested information and click SUBMIT. You’ll then have the opportunity to enter an additional number for that user, or to pre-register somebody else.

Participant Pre-Registration

Submit

Enter a participant's email address to update their profile. [Learn More](#)

Identification

First Name	<input type="text"/>	Specify a phone number for this user. For North America, enter 10-digit number including area code. (e.g. 415 555 6789). For other locations, use + followed by the country code and number. (e.g. +44 20 3333 4567). Add an extension using x followed by 0-9, #, or * (p to insert pause).	
Last Name	<input type="text"/>		
Time Zone	US/Pacific <input type="button" value="v"/>		
Company	<input type="text"/>		
<input type="button" value="User not listed -- please proceed"/>			
E-mail Address	<input type="text" value="sally.forthwright@zipdx.com"/>	Phone #	<input type="text"/>
Verify E-mail	<input type="text" value="sally.forthwright@zipdx.com"/>	Dialing Option	Auto-ID & Call Me <input type="button" value="v"/>

Now, when you issue your meeting invitation (either from your electronic calendar, or from www.ZipDX.com), the “welcome” email that ZipDX sends to the participants will include confirmation of the phone number(s) you’ve entered on their behalf.

CONFERENCE CODES: If you want, instead of listing all your participants’ E-mail addresses, you can set your meeting up using a “Conference Code”. In this case, you assign a 6-digit code to your meeting and communicate that to your participants. At meeting time:

- The ORGANIZER dials into ZipDX and is recognized automatically or with your 7-digit PIN (or, ZipDX can call you if you’ve enabled that in your profile).
- The PARTICIPANTS dial into ZipDX and enter the 6-digit Conference Code.

This isn’t as convenient or as secure as Identity-Based Conferencing using E-mail addresses, but may be appropriate for certain circumstances. We don’t recommend inviting via E-mail address AND offering a conference code, as all those options tend to confuse participants. Choose one or the other.

ZipDX DASHBOARD: Once the meeting is underway, you can use the ZipDX dashboard to monitor your meeting. As the Organizer, the Dashboard gives you the ability to add and remove people from the conference, to mute all or some participants, and to control various conference settings.

[Access an in-progress conference](#) not shown below using a conference code.

In Progress Conferences				Conferences not showing up? Refresh
Topic	Scheduled Start	Actual Start	Code	
Budget Review	09/27/09 04:36pm	04:36pm	<input type="button" value="start WebShare"/> <input type="button" value="Dashboard"/>	

Pending Conferences Create a Conference with

Log in at www.ZipDX.com, and look for the gold “Dashboard” link associated with your In-Progress conference. A separate window will open and your conference participants will be displayed. For each one, the Dashboard also shows their mute status, if their hand is raised, if they’ve cast a vote, and if they are in a private sub-conference room. At the very top, drop-down menus give the organizer and other Hosts access to “lecture modes” (to automatically mute participants); to other settings (to lock the

meeting or turn chimes and announcements on and off); to control the sub-conference rooms; to turn recording and transcription on and off; and to dial out to others.

The Activity Box (upper right) shows which participants are currently talking (or making noise). If you hear background noise or echoes, use the mute controls to block audio from the offender(s). To take action on a specific participant, click their name to access the action menu. If you are a Participant rather than an Organizer, you'll have a more limited Dashboard view.

Note at the bottom of the participant list, in gray, you see participants that were invited but have not yet joined, as well as a list of those that have attended the conference and have now exited. On the right is a Chat box, which provides a quick and easy way for Hosts and Participants to communicate without interrupting the audio portion of the conference. Only those using the Dashboard see these messages.

TIP: After launching the Dashboard, click on the “help” link for more details.

FREQUENTLY ASKED QUESTIONS and OTHER TIPS

International Calls: Attendees can dial into ZipDX using local numbers in cities around the world. The list is updated frequently and can always be viewed at: <http://www.zipdx.com/Info/Numbers>

ZipDX can also dial OUT to any number in the world using the Call-Me feature. Most destinations don't carry an extra charge; mobile numbers in some countries have a modest per-minute fee. Using the Call-Me feature is usually the most economical way to connect international attendees.

Call-Me Details: Each attendee customizes ZipDX so that their call-me configuration suits their preferences. Once it's set up, you can usually leave it alone. Click on the "Profile" tab at www.ZipDX.com to review and change your settings.

You can list **up to ten phone numbers**. By default, ZipDX will call all your numbers at once, and wait for you to answer one of them and "acknowledge" the call (by pressing "1"). Then the other calls will stop ringing, and you'll be sent into your conference.

You can **set a delay** under the "advanced preferences" in the Call-Me settings for any individual number. This way, you can have ZipDX call your office phone first, for example, and then call your mobile phone if you haven't answered.

If your company has an "automated attendant" you can **program ZipDX to dial "extension digits"** after connecting to the main number.

You can set a **"time window"** during which Call-Me is enabled; ZipDX will not call you outside this window. Use this to avoid conference calls that your international colleagues schedule in the middle of your night.

ZipDX will typically call you about 2 minutes before the conference start time. If you don't answer and acknowledge the call, ZipDX will call again in 3 minutes. Then it will give up. You can always dial back into the call later.

If you don't want to be called for a conference to which you've been invited, you can **"opt out"**. Look for this feature on the HOME tab at www.ZipDX.com.

Keypad Controls: When you are on a call, you can use your telephone keypad to access various controls. The group in green is available to all attendees; the red group is only available to designated conference hosts.

*1 Raise Hand	*2x Vote for X	*3 Roll Call	*91 Hand Mgmt	*92 Conf Settings	
*4x Move to Room X		*6 Self Mute	*94x Recall Room X	*950/1 Recording Off / On	*960/1 Soft Mute Clear/Set
	*8x Special Function	*9.. Host Cmd →	*970/1 Hard Mute Clear/Set	*98nn# Dial-Out To nn	*99x Cancel Dial-Out

Most useful: *6 to mute and un-mute yourself. A host can use *961 to mute everybody (if the conference gets too noisy); then individuals can un-mute using *6 when they want to talk. Most of these commands play voice prompts to help you navigate the options.

If you are a Host of a conference and need to add somebody to the call, just dial *98 followed by their phone number and then "#" and they'll be brought right into the meeting. If you need to hang up on them (because you get voice-mail, for example) dial *991.

VoIP & Soft-Phones: ZipDX can work with VoIP phones, including a Soft Phone that you install on your PC. If you are listed as an Organizer on a ZipDX account, you can download a Soft Phone from www.ZipDX.com; look for the "SoftPhone Client" link under the PROFILE tab and follow instructions.

If you want to connect to ZipDX using your own VoIP phone, you can dial this SIP URI: <sip:1234567@login.zipdx.com>, where you replace 1234567 with your ZipDX 7-digit PIN.

For more details on advanced configuration of VoIP phones, just E-mail support@zipdx.com. It's possible to use the Call-Me feature with VoIP, and other advanced features are also available. Plus it's cheaper!

Phone System Integration: ZipDX can work in conjunction with IP-PBX's, and conference calls can be conducted in wideband (for better audio fidelity).

TOP TIP: Experiment! Have a short call with a colleague and explore the features of ZipDX.