



PRIMUS Conference Services

On-Line Administrator Guide

Application functionality:

- 1) Call Details, Summaries and Usage reports
- 2) Individual Moderator (User) Profiles

Sign-In

Users are presented with the option to log in as an **Administrator** or a **Moderator**.

Administrator: These are typically the main contact at a Company. However, you may choose to provide administrator access to management or to accounts payable for internal cost allocation.

Moderators: These are the moderators that have been set-up with an account with PRIMUS.

Choose Administrator on Access Screen:

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About Primus Business Services Residential Services Français

Customer Care
PRIMUS Conferencing Service

Use this section if you wish to administer your own account. From here you can check your conferencing usage, conference call details, and your user profile.

Are you an:

Administrator:

Moderator:

Submit

Required fields

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Administrator Sign-In

The account administrator log-on allows a chosen individual from your company to access all on-line reporting information associated to a specific account number (ie.6000001234). Sign-in requires the Administrator Access Code and Administrator Password :

Secure Public Website Administrator Log-In

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Customer Care
PRIMUS Conferencing Service

Administrator Login

Administrator Access Code ▶

Password ▶

[forgot password?](#)

Remember my account number

Submit

▶ Required fields

Forgot your Password

If the administrator forgets their password they can click on "forgot password?" button to have it sent to them.

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About Primus Business Services Residential Services Fr

Customer Care
PRIMUS Conferencing Service

Administrator Login

Administrator Access Code ▶

Password ▶

[forgot password?](#)

Remember my account number

Submit

▶ Required fields



Once the “forgot password” button is clicked, the administrator will be prompted for their administrator access code. Once the code is entered, the administrator account code and the password will be emailed to the **email address** that PRIMUS has on record for the account’s contact. This will also be used for secure transmission of the password at the time of account set-up.

Note: At the time of initial account set-up the person assigned as the company Administrator will receive a letter, via email, to the email mail address identified at the time of service set-up with the company Administrator Access Code. The Administrator should go to the web sight, Select “Forgot Password” and enter the Administrator Access Code for secure transmission of the password to the same email address as they received the notice of Administrator Access Code.

Select an Application

After logging on successfully, an administrator will be able to choose from the applications available to their account.

When “Online Reports” is chosen from the menu:



The Administrator will then be prompted to select a service. They will be presented with 2 options.



Select a Service:

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About Primus Business Services Residential Services

Customer Care
PRIMUS Conferencing Service

[Sign Out](#)

Select a Service:

Call Details
 User Profiles

Submit

Required fields

If "Call Details" is the Service selected:



Call Details

This portion of the on-line reporting application is used to review call details for an entire account. The administrator will have certain criteria they can use to make their search more specific. Please see the screen shot below:

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PRIMUS Conferencing Service

[Sign Out](#)

Moderator Selection Criteria

Start date ▶ - -

End date ▶ - -

Moderator Select

Department Select

Reference Select

▶ Required fields

- ▶ 1) This will provide call details for the previous invoice period
- ▶ 2) Specify a reference entered by that account only
- ▶ 3) Specify a department with that account only
- ▶ 4) Specify a particular moderator within that account only
- ▶ 5) End date of search
- ▶ 6) Start date of search



The Call Details View Screen:

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Customer Care
User Profile

[Sign Out](#) Page 1 of 1 [Export to TXT file](#) [Send to Printer](#)

Total: \$ 178.05	Access Code: 5000001954	Report Period: Apr 01, 2003 to Apr 30, 2003	Report Date: May 30, 2003
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Moderator Summary	Moderator	Description	Amount
	Joe Parent	Conferencing Services	145.23
		Inbound Long Distance	32.82
		Total	178.05

[Back to Selection Criteria](#)
[Select Another Service](#)

4/29/2003

Anytime™	Caller ID	Start	End	Duration	Bridge	Toll	Total
Joe Parent				52:26(Mins)	10.49	0.00	\$10.49

[Add Ref. Number](#)

4/29/2003

Anytime™	Caller ID	Start	End	Duration	Bridge	Toll	Total
Joe Parent				75:09(Mins)	15.01	0.00	\$15.01

[Add Ref. Number](#)

Exporting the Details to MS Excel

This button will export any results to a text file. This file can be saved as a MS Excel document for analysis.

Services available in the Call Details

The following products/services are available through the on-line reporting module:

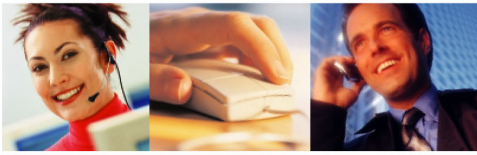
- 1) PRIMUS Anytime Conferencing
- 2) PRIMUS Anytime Plus Conferencing (rates will show in detail)
- 3) PRIMUS Onetime Conferencing
- 4) Replay Services



Exporting the Details to MS Excel (TXT File):

The files will be in the following format.

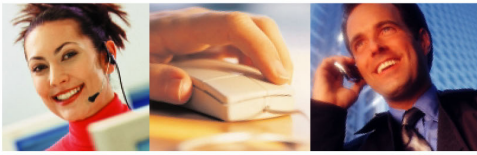
PRIMUS ONLINE REPORT								
Account Number	5000001954							
Report Period	Apr 01, 2003 to Apr 30, 2003							
Report Date	30-May-03							
MODERATOR SUMMARY								
Joe Parent	Conferencing Services	145.23						
	Inbound Long Distance	32.82						
	Total	178.05						
CONFERENCE CALL DETAILS								
4/29/2003								
Anytime™	CallerID	Start	End	Duration	Bridge	Toll	Total	
Joe Parent	(416) 646-3608	1:24:10pm	1:28:39pm	0:04:29	0.9	0	0.9	
	(905) 337-6020	1:24:18pm	1:51:07pm	0:26:49	5.36	0	5.36	
	(416) 646-3555	1:30:00pm	1:51:08pm	0:21:08	4.23	0	4.23	
				52:26(Mins)	10.49	0	10.49	
4/29/2003								
Anytime™	CallerID	Start	End	Duration	Bridge	Toll	Total	
Joe Parent	(416) 646-3608	11:21:03am	11:58:44am	0:37:41	7.54	0	7.54	
	(905) 337-6222	11:21:20am	11:58:41am	0:37:21	7.47	0	7.47	
				75:09(Mins)	15.01	0	15.01	
4/29/2003								



Select a Service:

The screenshot shows the Primus Customer Care interface. At the top left is the Primus logo. To its right are navigation links: "About Primus", "Business Services", and "Residential Services". Below these is the heading "Customer Care" and "PRIMUS Conferencing Service". A "Sign Out" link is visible. The main form area is titled "Select a Service:" and contains two radio button options: "Call Details" and "User Profiles". A "Submit" button is located to the right of the options. A "Required fields" label is at the bottom right of the form area. An arrow points from the text below to the "User Profiles" radio button.

If "User Profiles" is the Service selected:



User (Moderator) Profiles

This part of the application allows an administrator to obtain a listing of all personnel that have been set up with conferencing codes as well as a summary of a particular user within the account.

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About Primus Business Services Residential Services

Customer Care User Profile

[← Sign Out](#)

Select a Profile

No Department

- [Andreas Gierke \(Disabled\)](#)
- [Andreas Gierke2 \(Disabled\)](#)
- [Arnon Schefflan \(disabled\)](#)
- [Bjorn Asmul](#)

Simply by clicking on an individual name, the administrator can view the profile of that Moderator, how their conferencing application has been configured and a snapshot of their Year-to-Date usage.



Select an Application

To modify or add Moderator Accounts, "Account Manager" is chosen from the menu:

The screenshot shows the Primus logo in the top left. The navigation bar includes "About Primus", "Business Services", and "Residential Services". The page title is "Customer Care" and "PRIMUS Conferencing Service". A "Sign Out" link is visible. The "Select an Application" dropdown menu is open, showing two options: "Online Reports" and "Account Manager", each with a help icon. A "Required fields" indicator is at the bottom right.

Add/Edit a Moderator Account

Once in the Account Manager section, an administrator will have 2 options:

The screenshot shows the Primus logo and navigation bar. The page title is "Customer Care" and "PRIMUS Conferencing Service". A "Sign Out" link is visible. The "Online Account Administration" section is active, displaying the user's name as "Name: Jeff Downs" and account number as "Account: 5000001031". Below this, there are two radio button options: "Add Moderator Account" (selected) and "Edit Moderator Account". A "Submit" button is located at the bottom right. A "Back to Selection Criteria" link is at the bottom left.



Add Moderator Account Option

To add a moderator account, choose the option and click submit. You will need to fill out the required fields in the “Add Moderator” section that identify name, phone number, etc.

The “Select Conferencing Operating Profile” section allows you to identify the features that the moderator account will require when using our PRIMUS Anytime Conference Service.

The screenshot shows the PRIMUS Customer Care web interface. At the top left is the PRIMUS logo. Navigation links include "About Primus", "Business Services", and "Residential Services". The page title is "Customer Care" with a sub-header "PRIMUS Conferencing Service". A "Sign Out" link is visible. The main section is titled "Add Moderator" and includes a "Required fields" indicator. The form contains the following fields:

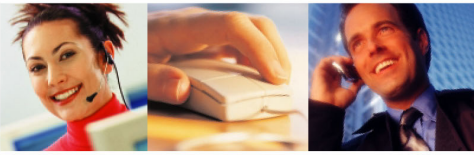
- Moderator Name:
- Moderator Phone:
- Moderator Email:
- Moderator Assistant Name:
- Moderator Assistant Phone:
- Moderator Assistant Email:
- Department:

Below this is the "Select Conferencing Operating Profile" section with the following options:

- Name Prompt :
- Entry / Exit Tones :
- Moderator Wait :
- Call Record :
- Reference # :

An "Add Moderator" button is located at the bottom right of the form.

Note: Once completed, this will result in a Welcome package with a custom wallet card and instructions being sent for a newly added Moderator.



Conferencing Operating Profile Settings

Name Prompt – Incoming participants are prompted to record their names.

Entry/Exit Tones – Distinct tones let you know when participants enter or exit the call. Participants' names can also be played into the call upon entry.

Moderator Wait – Participants may speak amongst themselves before the Moderator has joined the call or may wait on hold with music, until the Moderator has joined the call. Choosing Yes activates the music option, No lets participants speak among themselves.

Call Record – Simply press *4 to record your Call once you have entered the conference. Choosing 'option' activates this feature.

Reference Number – Activating this option will prompt the moderator for an accounting, matter or customer code, etc.

Confirmation Screen

Once you have completed all of the information, click the “Add Moderator” button and you will receive the following confirmation screen upon successful addition of the moderator:

The screenshot shows the PRIMUS Conferencing Service web interface. At the top left is the PRIMUS logo. To the right are navigation links: "About Primus", "Business Services", and "Residential Services". Below these is the heading "Customer Care" and "PRIMUS Conferencing Service". A "Sign Out" link is visible. The main content area displays "Add Moderator Result" with a blue bar indicating "MODERATOR ADDED". Below this, a "Details:" section lists the following information: Moderator Name: Joe Parent, Moderator Number: 416 208 5555, Moderator Email: joe.parent@primustel.ca, Participant Code: 1431318, and Moderator Code: 4050693. At the bottom of the details section are two buttons: "Add Another Moderator" and "Edit this Moderator". A "Back to Selection Criteria" link is located on the left side of the page.

At this stage you can add another moderator or edit the information of the one you just added.



Edit Moderator Account Option

To edit a moderator account choose the option and click submit.

After selecting edit option you will be provided a drop-down list of existing moderators to choose from.

Simply choose the moderator that you would like to edit:

The screenshot shows the PRIMUS Customer Care web interface. At the top left is the PRIMUS logo. To the right are navigation links: 'About Primus', 'Business Services', and 'Reside'. Below these is the heading 'Customer Care' and 'PRIMUS Conferencing Service'. A 'Sign Out' link is visible. The 'Edit MODERATOR' option is highlighted with a red square. Below this, a dropdown menu shows 'Joe Parent' and a 'Select' button.

Editing Information

There are 2 sections of information that can be edited for an existing moderator account. The first section is the basic name, phone number, etc. information seen below:

The screenshot shows the 'Edit Moderator' form. It includes the following fields and values:

Edit Moderator		
Dial In Phone Numbers:	(866) 613-5220 (416) 204-1403	▶▶ Required fields
Moderator Name:	▶▶ Joe Parent	
Moderator Phone:	▶▶ 416 208 5555	
Moderator Email:	▶▶ joe.parent@primustel.c	
Moderator Assistant Name:		
Moderator Assistant Phone:		
Moderator Assistant Email:		
Department:	No Department ▼	

The section contains the Conferencing Operating Profile settings that are applicable to that moderator's PRIMUS Anytime Conference calls.



The moderator's participant and moderator passcodes can also be changed in this section:

Select Conferencing Operating Profile	
Name Prompt :	<input type="button" value="?"/> No ▾
Entry / Exit Tones :	<input type="button" value="?"/> Tone ▾
Moderator Wait :	<input type="button" value="?"/> No ▾
Call Record :	<input type="button" value="?"/> Option ▾
Reference # :	<input type="button" value="?"/> No ▾
Account Status:	<input type="button" value="?"/> Active ▾

Conferencing Operating Profile Settings

Name Prompt – Incoming participants are prompted to record their names.

Entry/Exit Tones – Distinct tones let you know when participants enter or exit the call. Participants' names can also be played into the call upon entry.

Moderator Wait – Participants may speak amongst themselves before the Moderator has joined the call or may wait on hold with music, until the Moderator has joined the call. Choosing Yes activates the music option, No lets participants speak among themselves.

Call Record – Simply press *4 to record your Call once you have entered the conference. Choosing 'option' activates this feature.

Reference Number – Activating this option will prompt the moderator for an accounting, matter or customer code, etc.

Account status – This allows the Administrator to suspend individual moderators if they go on a leave of absence, or leave the company to protect the company from unauthorized use of that Moderators' codes. The Administrator may also reactivate these accounts at a later date.

If you have any questions please direct them to your PRIMUS Customer Service Representative.