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Lesson 1
Getting Started with Gopher Conferencing

Overview
Once you have a Gopher Messaging account, there are a few basic steps that you should perform before you start using the system to make conference calls.

Objectives
After this lesson, you will be able to:

- log into the Gopher Conferencing system
- change your password
- edit your personal information
- update your address book
Logging into Gopher Conferencing

1. Open a web browser.

   **Note:** In order to ensure that you can use all of the features in Gopher Conferencing, be sure to use a supported browser. Gopher Conferencing currently supports Microsoft Internet Explorer only.

2. Click the address bar, and type "go4conf.umn.edu"

3. Press [Enter] on your keyboard, or click the button to the right of the address bar. The Gopher Conferencing login screen displays.

4. Enter your U of M Internet ID in the **login id** field.

5. Enter your Gopher Conferencing password in the **password** field.

   **Note:** If this is your first time logging into Gopher Conferencing, your password is the same as your U of M internet id.

6. Press [Enter] on your keyboard, or click the **login** button. The Gopher Conferencing Welcome page displays.

**Retrieving your password**

*If you cannot remember your Gopher Conferencing password, it is very easy to retrieve.*
1. From the Gopher Conferencing home page (go4conf.umn.edu), click the **forgot password** button.

   **Note:** Your Gopher Conferencing login id is the same as your U of M Internet ID.

2. Enter your U of M e-mail address, and click the **Submit** button.

   *Your password will be sent to your U of M e-mail account.*

**Updating your personal information**

*It is recommended that you change your password the first time you log into Gopher Conferencing. You may also want to take a moment to update your other personal information as well.*

1. After logging into Gopher Conferencing, click the **profile** tab at the top of the page.
Your account information displays.

2. To make any changes to your account information, click the **Update** button.

3. Enter the desired changes into the appropriate fields.
   - To change your password, first enter your new password in the **Password** field, and then reenter it in the **Verify Password** field.

4. When you have finished updating your account information, click the **Submit** button.

5. Review your changes, and click the **Confirm** button.
Managing your contacts

Entering your contacts in your address book will make it easier for you to schedule conferences with Gopher Conferencing, as it will save you from having to retype names, e-mail addresses, and telephone numbers again and again. It is recommended that you enter contact information for any individuals that you plan to regularly schedule in conferences.

Adding a contact

1. After logging into Gopher Conferencing, click the "address book" tab at the top of the page.
The Manage Contacts page displays.

2. To add a new contact to your address book, click the **add new entry** button.

The Add New Entry window displays.

3. For each entry, enter the following information:
   
   - First name
   - Last name
   - E-mail
   - Telephone number

Note: If you do not enter e-mail addresses for your contact, you will have to retype their e-mail address each time you schedule them in a conference. Otherwise, they will not receive e-mail confirmation when you schedule them in meetings.
Note: If you wish to set up conferences that automatically dial out to participants (page 19), entering telephone numbers for your contacts will save you from looking up the same telephone numbers again and again (page 20).

Telephone numbers must be entered as **seven-digit numbers**, and you may include or exclude dashes. **Gopher Conferencing cannot dial five-digit numbers.** For example:
- 612624XXXX
- 612-624-XXXX

Not…
- 4XXXX

4. When you have finished, click the **add** button.

*The contact is added to your address book.*

**Uploading Contacts**

*Gopher Conferencing can upload contacts from the address book in your desktop e-mail client, saving you from entering each contact manually.*

*If you wish to remove contacts from Gopher Messaging, you must do so one at a time, so do not upload your entire address book unless you are certain that you want to.*

**Note:** Gopher Conferencing currently supports Microsoft Outlook and Microsoft Outlook Express only. It may be possible to import address books from other desktop clients. However, if they are not in a format compatible with the Gopher Conferencing contact list, they will not be useful.

1. From the **address book** page, click **Upload Contacts**.
2. Choose to either “update existing entry with values from uploaded entry” or to” keep the existing entry and ignore the uploaded entry.”

3. Click the **upload** button.

   *In order to proceed, you will need to download “Address Magic Web Edition.”*

4. Click the ![Address Magic](image) icon, and follow the steps.

   **Note:** If the download fails, you may need to install an ActiveX Control. Click the box at the top of the window to install the necessary ActiveX Control.
5. Click the **Next** button.

6. Select the Source Format, and click the **Next** button.

   "If you wish to attempt to import an address book from an unsupported desktop client, first uncheck the “Only show formats for installed applications” checkbox."

7. Click the **Finish** button.

   **Note:** If you have a large address book, it will take several minutes to upload.
The Gopher Conferencing address book is updated.

**Editing a contact**

After you have added contacts to your address book, you may wish to modify or delete them.

**Note:** Contacts are organized alphabetically by name. Gopher Conferencing can store up to 10 contacts on a single page. If you have entered more than 10 contacts, you will need to navigate between pages.

To modify a contact...

1. Click the **Modify** button that corresponds with the contact that you would like to modify.

   ![Modify Entry Page]

   *The Modify Entry page displays.*

2. After making the desired changes, click the **modify** button.

   *The updated entry displays.*

To delete a contact...

1. Click the **Delete** button that corresponds with the contact that you would like to delete.
2. Click the **OK** button.

_The updated Contacts list displays._
Lesson 2
Setting up a Conference

Overview
You can set up two different types of conferences with Gopher Conferencing: scheduled conferences, and ad hoc conferences. Each type has its advantages: use scheduled conferences to reserve your time on the conference bridge and to leverage the full functionality of Gopher Conferencing, and use ad hoc conferences for when you spontaneously decide that you want to conference. Select the conference that is right for you.

Objectives
After this lesson, you will be able to:

- Set up a scheduled conference
- Set up an ad hoc conference
Setting up a scheduled conference

While it is sometimes easier to simply use the ad hoc conference, there are many advantages to scheduling your conferences. When you schedule your conferences, you ensure that your time will be reserved in the Gopher Conferencing System. Conferences can be scheduled to repeat, saving you from scheduling conferences over and over again. Scheduled conferences allow for up to 30 participants, and scheduling allows you to make use of a number of features that are not available through ad hoc conferences.

A scheduled conference is set up by a system subscriber through the Gopher Conferencing web interface.

Setting up conference details

1. From the Gopher Conferencing home page (go4conf.umn.edu), either:

   1. Log in to Gopher Conferencing (see page 5).

   2. Click the reservation tab at the top of the page or the create meeting tab.
Or…

1. Click **Create Meeting**.

2. Log in to Gopher Conferencing.

   The **Create Meeting** page displays.

   2. Enter a descriptive meeting name in the **Meeting Name** field.

   3. Enter an agenda for the conference in the **Agenda** field (not required).
4. Use the drop down menus to select the **date**, the **start time**, and the **duration** of the conference.

   **Note:** The default setting begins the conference at the next 15 minute increment, with a duration of one hour.

5. Use the drop down menu to select the **Meeting Type**:

   - **Unique Passcode:** Each participant is assigned a different passcode for the conference. Using this Meeting Type allows the conference moderator to keep track of attendance for the conference, as well as enables a number of other moderator features.
   - **Generic Passcode:** All participants use the same passcode to enter the conference. While this conference type does not allow the moderator to take attendance and prevents the moderator from using a number of features, this method may be easier for participants.
   - **Pre-Registration enabled with Unique Passcode:** Each participant is required to register for the conference before receiving a conference ID and a Unique Passcode.
   - **Pre-Registration enabled with Generic Passcode:** Each participant is required to register for the conference before receiving a conference ID and a Generic Passcode.

   **Note:** If you require your participants to pre-register for a conference, you may check to see who has registered any time before the conference begins by looking up a scheduled meeting. For more information, see page 21.

6. Use the **Yes** or **No** radio buttons to indicate whether or not you wish to use the **enable name recording** feature (not required).

   When you enable name recording, participants will be prompted to state their name and then press the pound sign (#) before entering a conference. The Gopher Conferencing system will use this to create a recording, which it will play when the participant enters and exits the conference.

   **Note:** The default setting is **No**.

7. Use the drop down menus to select the **entry** and **exit options**:

   - **Play Tone:** The system plays a tone to alert participants when a new participant enters or exits the conference.
   - **Play Wave File:** This feature is not available with the current version of Gopher Conferencing.
   - **Play None:** The system does not alert participants when new a new participant enters or exits the conference.

   **Note:** The default setting is **Play Tone**.

8. Use the **Yes** or **No** radio buttons to indicate whether or not you wish to create a **Recurring Meeting** (not required).
If you elect to create a recurring meeting, you will also need to indicate the following:

- Whether or not to use the same conference ID for each meeting
- How often to schedule the meeting (daily, weekly, biweekly, monthly, bimonthly)
- When to end the meeting:
  - never
  - after a designated number of occurrences
  - after a designated date

9. Use the drop down menus to select the **Number of Active Attendees** (participants) that will join in the conference.

   **Note:** You must include yourself in this number. For example, if you wish to invite two other participants in addition to yourself, you should select three attendees.

10. Use the **Yes** or **No** radio buttons to indicate whether or not you wish to send out an **E-mail reminder** to all participants 24 hours prior to the meeting (not required).

   **Note:** The default setting is **No**.

11. Use the **Yes** or **No** radio buttons in the **Conference w/o Moderator** line to indicate whether or not you wish to allow the conference to continue after the moderator leaves (not required). It is recommended that you allow the conference to continue without the moderator.
12. Use the Yes or No radio buttons to indicate whether or not you wish to Record the Conference (not required).

**Note:** When you select this option, the conference will automatically record. However, once the conference is underway, you may choose to stop recording at any time and then to start again.

13. Use the Yes or No radio buttons to indicate whether or not you wish to Automatically Dial Out (not required).

When this option is selected, participants will not need to dial the Gopher Conferencing System to join a conference. Instead, the system will dial them automatically when the conference is ready to begin.

**Note:** If you are going to use this feature, it is recommended that you inform all participants that you have invited them to a conference to prevent them from being confused when they receive a telephone call prompting them to log into the Gopher Conferencing system.

14. When you have finished filling out the form, click the continue button.

**Adding participants**

There are two different ways to create participant lists for conferences:

- by adding names directly from your address book
- by entering each name and e-mail address manually

1. Select the participant(s) from your address book, and click the add button.
Or…

1. Enter the name, e-mail address, and telephone number into the corresponding fields, and click the **add** button.

The participant displays in the **participant name** field.

**Note:** You must include an e-mail address for each participant, or else they will not receive email notification that the conference is to take place.

You must also include a telephone number for each participant if you wish to use the **Automatically Dial Out** feature (see page 19). For more on entering telephone numbers in Gopher Conferencing, see page 8.
2. To delete participants from the participant list, select the participant(s) from the list and click the **delete** button.

3. When the participant list is ready, click the **reserve meeting** button.

4. Review the conference information.
   
   - If you need to make any changes, click the **back** button.
   
   - Once you have confirmed that all of the information is correct, click the **confirm** button.

*The confirmation screen displays.*

![Confirmation Screen](image)

*If the confirmation screen does not display,*

- It is possible that the start time for your conference has already passed. Review the conference details and try again.

- It is possible that the number of ports you have requested for your conference is not available at that time. (1 port is required for each participant.) Try to schedule the conference at another time.
Looking up a Scheduled Meeting

After you have scheduled a meeting, you may look it up through the Gopher Conferencing web interface in order to retrieve the conference details (such as conference ID or moderator passcode), or to check and see which participants have registered for the conference.

1. From the Gopher Conferencing home page (go4conf.umn.edu), click the reservation tab.

2. Click Scheduled Meetings.
3. Select the meeting from the list, or select the **Modify** button that corresponds with the meeting.

4. The meeting details display, including the conference ID and moderator passcode.

   In the **participant** section, the names of all *registered* participants display.
Setting up an ad hoc conference

Many of the features that are available in scheduled conferences cannot be used in ad hoc conferences. But ad hoc conferencing comes in handy when you spontaneously decide that you want to conference with up to 6 colleagues.

Locating your ad hoc conference details

In order to begin an ad hoc conference, you will need an ad hoc conference ID and moderator passcode. Both of these were assigned to you when your Gopher Conferencing account was created.

- When your Gopher Conferencing Account was originally created, you were sent an email from the Gopher Conferencing system containing your ad hoc conference details.

   **Note:** The message was sent from your own U of M Internet ID (e.g. ggopher@umn.edu). The subject of the message is “New member created.”

- Your ad hoc conference details may also be retrieved your **profile** page in Gopher Conferencing.

  1. From the Gopher Conferencing home page (go4conf.umn.edu), click the **profile** tab.
2. Click *ad hoc info.*

*Your conference ID and master passcode display*
Beginning an ad hoc conference

There are two ways to begin an ad hoc conference.

1. Inform your participants when the conference will begin, and provide them with your ad hoc conference ID.

2. At the designated time, dial in the Gopher Conferencing system (off campus, dial 612-624-2663; on campus, dial 4-2663).

3. Enter your ad hoc conference ID.

4. Enter your moderator passcode.

5. Wait for the conference participants to dial in, and begin the conference when you are ready.

To begin an ad hoc conference from the web interface...

1. From the Gopher Conferencing home page (go4conf.umn.edu), click the profile tab.
2. Click ad hoc info.

3. Click send reminder.
4. Use the drop down menus to select the date and time that the conference is to take place.

5. Add up to 5 participants to the conference.

   (For more on adding participants, see page 29.)

   **Note:** You must include an e-mail address for each participant, or else they will not receive email notification that the conference is to take place.

6. Click the **send email** button.

   *The confirmation screen displays.*
Overview
When you set up a conference, you automatically become the moderator of that conference. The conference will not begin until you have dialed into the conference system.

Whether you have set up an ad hoc or a scheduled conference, there are two ways to moderate a conference: 1.) over the telephone, or 2.) over the telephone and through the web interface. Both methods deliver the same essential functionality, but the web interface offers some additional features. But even if you chose to use the web interface, you will still need to dial into the conference in order to talk with the other conference participants.

Objectives
After this lesson, you will be able to:

- Moderate an ad hoc or scheduled conference over the telephone
- Moderate an ad hoc or scheduled conference through the web interface
Moderating a conference over the telephone
Neither the moderator nor the participants may log into the conference more than 10 minutes before the conference is scheduled to begin.

1. Dial the Gopher Conferencing system (off campus, dial 612-624-2663; on campus, dial 4-2663).

2. Enter the Conference ID, followed by the pound sign (#).

3. Enter the moderator passcode, followed by the pound sign (#).

   • **For a scheduled conference:** When you set up the conference, you were sent an e-mail from the Gopher Conferencing system containing the conference ID and your moderator passcode. If you cannot locate that information, you may retrieve the conference details from the Gopher Conferencing system by looking up a scheduled meeting. (See page 21.)

   • **For an ad hoc conference:** Your ad hoc conference ID and moderator passcode were assigned when you became a Gopher Conferencing system subscriber. (For more on locating your ad hoc conference information, see “Locating your ad hoc conference details” on page 23.)

4. When all of the participants have dialed into the conference system, begin your conference.

**Telephone Menu commands**

<table>
<thead>
<tr>
<th>Command</th>
<th>Press Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connect to an operator</td>
<td>*0</td>
</tr>
<tr>
<td>Invite participant</td>
<td>*1</td>
</tr>
<tr>
<td>Participant count</td>
<td>*2</td>
</tr>
<tr>
<td>Extend the conference</td>
<td>*3</td>
</tr>
<tr>
<td>Continue without moderator</td>
<td>*4</td>
</tr>
<tr>
<td>Lock or unlock conference</td>
<td>*5</td>
</tr>
<tr>
<td>Mute or unmute your line</td>
<td>*6</td>
</tr>
<tr>
<td>Recording features</td>
<td>*7</td>
</tr>
</tbody>
</table>

   - Connect to an operator: press *0
     - Enter a telephone number, and Gopher Conferencing will invite the person to join the conference.

   - Invite participant: press *1
     - Find out how many participants are in the conference.

   - Participant count: press *2
     - Add 15 minutes to the conference.

   - Extend the conference: press *3
     - Allow the conference to continue after the moderator exits (at least two other participants required).

   - Continue without moderator: press *4
     - Lock the conference to prevent additional participants from logging in. Or unlock to allow additional participants.

   - Lock or unlock conference: press *5
     - Record the conference.
Volume control  press *8  Change conference volume.
Place in lecture mode press *9  Mute all participants except the “lecturer.”
Time remaining press 30  Hear how much time remains in the conference.
Leave a message for the conference press 38  Record a message, which will be played to participants upon entry.
Expand the conference by two ports Press 39  Add ports to the conference so that you may invite more participants.
Help press **  Listen to the telephone commands for moderating a conference.

5. When the conference is complete, hang up the telephone to end.

**Moderating a conference through the web interface**

*Neither the moderator nor the participants may log into the conference more than 10 minutes before the conference is scheduled to begin.*

*Even if you choose to use the web interface to moderate a conference, you will first need to dial into the Gopher Conferencing system.*

1. Dial the Gopher Conferencing system (off campus, dial 612-624-2663; on campus, dial 4-2663).
2. Enter the Conference ID, followed by the pound sign (#).
3. Enter the moderator passcode, followed by the pound sign (#).

- **For a scheduled conference:** When you set up the conference, you were sent an e-mail from the Gopher Conferencing system containing the conference ID and your moderator passcode. If you cannot locate that information, you may retrieve the conference details from the Gopher Conferencing system by looking up a scheduled conference. (See page 21)

- **For an ad hoc conference:** Your ad hoc conference ID and moderator passcode were assigned when you became a Gopher Conferencing system subscriber. (For more on locating your ad hoc conference information, see “Locating your ad hoc conference details” on page 23.)

**Note:** If you dial into the conference before it begins, the Gopher Conferencing system asks you if you would like to **leave a message for the conference**. If you choose to record a message, participants will hear that message after they sign in and before they enter the conference.

4. When all of the participants have dialed into the conference system, begin your conference.
If you wish to use the web interface to moderate the conference, log in.

1. From the Gopher Conferencing home page (go4conf.umn.edu), either:

   1. Log in to Gopher Conferencing (see page 5).

   2. Click the **join meeting** tab.

3. Enter the conference ID and passcode and click **login**.

Or…

1. Click **Join Meeting**.
2. Enter the conference ID and passcode and click **login**.

*The Gopher Conferencing web interface displays.*
The web interface uses a few features that are not available in the Telephone Interface:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecture Mode</td>
<td>Mute the lines of all conference participants except for the lecturer (This feature is also available for the moderator through the telephone interface. Through the web interface, the lecturer may be any participant that the moderator chooses).</td>
</tr>
<tr>
<td>Mute</td>
<td>Mute the line for any participant in the conference.</td>
</tr>
<tr>
<td>Kick out</td>
<td>Selectively disconnect a participant’s line via web controls at any time during the conference. The participant is removed from the participants list, and the individual telephone connection is severed.</td>
</tr>
<tr>
<td>Whisper</td>
<td>Moderator may have a private conversation with an individual participant without being heard by others.</td>
</tr>
</tbody>
</table>

Click the buttons in the upper right corner of the screen to display additional options.
Click the Attendees button to view a complete list of conference participants and to access various options associated with those participants. (This will only work if you scheduled the conference to use Unique Passcodes.” For more information, see Meeting Types on page 16.)
Click the **Conference Controls** button to access the conference controls.

- **Place the moderator in Lecture Mode**
- **Lock the conference to prevent additional participants from logging in, or unlock to allow additional participants.**
- **Add ports to the conference so that you may invite more participants**
- **Start and stop recording.**
- **Adjust the overall volume for all participants**
- **Add time to the conference**
- **Allow the conference to continue after the moderator exits (at least two other participants required)**
- **End the conference**
Click the **Invite** button to invite another participant to join the conference.

Enter the ten-digit telephone number for the invitee, and the Gopher Conferencing system will immediately dial the number to invite the participant to join the conference.

**Note:** In order to invite another participant to join, you must have available ports for the conference. To add ports, use the **Add Attendees** feature in the Conference Controls (see page 33).

5. When the conference is complete, hang up the telephone to end, and click the **logout** button on the web interface.
Lesson 4
Joining a Conference
Overview
If you have been invited to participate in a conference, all you have to do is dial in to the Gopher Conferencing system at the designated time and wait for the conference to begin.

Objectives
After this lesson, you will be able to:

- Join a scheduled conference
- Join an ad hoc conference

Joining a scheduled conference
If you have been scheduled to participate in a conference, you will receive email notification (with all of the necessary details). When the conference is scheduled to begin, dial in to the Gopher Conferencing system and sign in.

Neither the moderator nor the participants may log into the conference more than 10 minutes before the conference is scheduled to begin.

1. At the scheduled conference time, dial the Gopher Conferencing system (off campus, dial 612-624-2663; on campus, dial 4-2663).

   **Note:** The conference will not begin until the moderator logs in.

2. Enter the Conference ID, followed by the pound sign (#).

3. Enter the passcode, followed by the pound sign (#).

   **Note:** The conference ID and passcode are be sent to you in an email when the conference is created (it is be addressed from the moderator—the person that scheduled the conference). Save this information, and at the designated conference time, use it to log in to Gopher Conferencing.

   If you cannot locate this information, contact the person that scheduled the conference.

4. Once the conference begins, you may use the following telephone commands at any time:

<table>
<thead>
<tr>
<th>Command</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connect to an operator</td>
<td>*0</td>
</tr>
<tr>
<td>Participant Count</td>
<td>*2</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
5. When the conference is complete, hang up the telephone to end

### Joining an ad hoc conference

*If you have been asked to participate in a conference, the conference moderator will provide you with her ad hoc conference ID. She may choose to do so by whatever method he or she desires—telephone, email, etc. All you need to do is dial in to the Gopher Conferencing system at the designated time and sign in with the moderator’s ad hoc conference ID.*

1. At the scheduled conference time, dial the Gopher Conferencing system (off campus, dial 612-624-2663; on campus, dial 4-2663).

**Note:** The conference will not begin until the moderator logs in.

2. Enter the ad hoc conference ID, followed by the pound sign (#).

**Note:** It is the responsibility of the moderator to provide you with her ad conference ID when she decides to create an ad hoc conference. Save this information, and at the designated conference time, use it to log in to Gopher Conferencing.

3. Once the conference begins, you may use the following telephone commands at any time:

<table>
<thead>
<tr>
<th>Command</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connect to an operator</td>
<td>press *0</td>
<td></td>
</tr>
<tr>
<td>Participant Count</td>
<td>press *2</td>
<td>Find out how many participants are in the conference.</td>
</tr>
<tr>
<td>Mute or unmute your line</td>
<td>press *6</td>
<td></td>
</tr>
<tr>
<td>Time remaining</td>
<td>press 30</td>
<td>Hear how much time remains in the conference.</td>
</tr>
<tr>
<td>Help</td>
<td>press **</td>
<td>Listen to the telephone commands for participating in a conference.</td>
</tr>
</tbody>
</table>

4. When the conference is complete, hang up the telephone to end.