

MEETINGONE ONLINE ACCOUNT MANAGEMENT PORTAL

HOST / ROOM USER GUIDE



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TABLE OF CONTENTS

How to Login	4
Select a Role.....	4
Multiple Rooms	5
Home Tab	6
Manage Users	6
Add a New User	7
Edit an Existing User	8
Delete an Existing User	9
Manage Directory.....	10
Print Wallet Cards	10
Reset Host PIN	11
Settings Tab.....	11
In Call Features	12
Room Settings.....	13
Recordings Tab.....	14
Reports Tab	15
Directory Tab.....	16
Participant Management	17
Add Participant to Directory	17
Edit Participant	19
Delete Participant	19



MeetingOne

Groups.....	20
Add Groups.....	20
Add / Remove Participants in Group	21
Edit Group.....	22
Delete Group	23
Directory Upload	24
Search Directory Features	27
My Profile Button	28
Other User Interface Features -Toggle Audio Room	29



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HOW TO LOGIN

MeetingOne's Online Account Management portal is available at <https://meetingone.myconferenceportal.com/OAM/app>.

You will need to know your Username and Password.

If this is your first time trying to log into Online Account Management or you have forgotten your password, you can use the *Forgot your Password?* link to request your password; it will be sent to the email address entered as long as that address has been set up as a user in our system. This email address also acts as the *Username*. If you don't get an email after clicking the *Forgot your Password?* link, contact the MeetingOne customer service team at 888.523.8445 or support@meetingone.com for assistance.

Welcome to your online account.

You can manage all of your MeetingOne services, Conference Hosts, as well as start your meetings, or even pay your bill.

Log in now!

Username:

Password:

Remember Me

Forgot your password? [Click Here](#)

First time user? [Click Here](#)

SELECT A ROLE

When logging in, you may be presented with an option to choose a role for yourself. Most users will not encounter this, but if you're acting as an Account Admin for your account and also have an audio conference room, you will be presented with the option to select a role between these roles. Select the *End User* role.



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Choose Role

This user account has several levels available, please select one.

ACCOUNT ADMIN - MeetingOne USA /

End User

Make this my default profile and do not show me this screen again.

You can always reset your login profile under My Profile at a later time.

Once you have logged in, you will be taken to the *Home* tab of your audio conference room.

MULTIPLE ROOMS

If you are host of, or have been given user permissions to, multiple audio conference rooms, you will be taken to the first room in the listing, which is organized in numerical sequence.

You can toggle to different audio rooms that you have access to by selecting the audio conference room number from the dropdown at the top left of the screen and clicking *Go To*. You will be taken to the active tab for the selected audio conference room.

The screenshot shows the MeetingOne Online Room Management interface. At the top left is the MeetingOne logo and the text "Online Room Management 8773008690". To the right, user information is displayed: "User Name: mttgrffn320@gmail.com", "Name: Test User", and "Role: ROOM ADMIN". Below this is a dropdown menu with "334544" selected and a "Go To" button. A navigation bar contains tabs for "Home", "Settings", "Recordings", "Reports", and "Directory". The main content area is divided into two sections: "My Account Info" and "Room Info". "My Account Info" shows "Account: MeetingOne USA" and "Account Number: A0100000099", with a "Manage Directory" button. "Room Info" shows "Room Number: 334544", "Host PIN: 001005", "Direct Access Number: (303)330-0440", and "Room Name: TestRoom" (with a dropdown arrow). There is also a "Phone:" field and a "Manage Users" link. A "Save" button is at the bottom right of the Room Info section.



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HOME TAB

The *Home* tab displays the following information for your audio conference room:

- Account Name
- Account Number
- Room Number
- Host PIN
- Room Name
- Phone

Except for the room name, which can be changed, the other information can only be viewed by an end user.

There is also a *Manager Users* link, along with *Manage Directory*, *Print Wallet Card*, *Resent Host PIN*, and *Resend Welcome Email* buttons on the right side of the screen. These functions will be explained below.

The screenshot shows the MeetingOne Home tab interface. At the top, there are navigation tabs: Home (selected), Settings, Recordings, Reports, and Directory. Below the tabs, the interface is divided into two main sections: 'My Account Info' and 'Room Info'. The 'My Account Info' section contains a table with the following data:

Account	Test account for OAM guides	Created	2013-09-17	Disabled <input type="checkbox"/>	Set
Account Number	A01000065141	Last Modified	2013-09-17		

The 'Room Info' section contains a form with the following fields:

- Room Number: 1811961
- Host PIN: 820693
- Room Name: * John Smith
- Phone: [Empty field]

Below the form is a 'Save' button. To the right of the form, there are four buttons: 'Manage Directory', 'Print Wallet Card', 'Reset Host PIN', and 'Resend Welcome Email'. A 'Manage Users' link is located below the 'Phone' field.

MANAGE USERS

The *Manage Users* link allows you to create users who can access the Online Account Management portal and use Click&Meet for your room. Users can be added and managed by the room host, or by the account administrator. A user can perform all of the actions that the room host can with the exception of creating or deleting other users. Users will have the same functionality you do; users will see all of your room information. They can view billing reports, download recordings, edit your directory, and change your room settings. We recommend creating as few users as possible, or not creating any. The less people that can access your room, the more secure it will be.



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To create, edit, or remove users; click on the *Manage Users* link. A pop-up will appear; all of the Users who have access to your audio room will appear in a list in this pop up window.

A screenshot of a web application window titled "Users for 8552581321". The window contains a table with two columns: "Name" and "Email". The table has one row with the following data:

	Name	Email
<input type="checkbox"/>	Carol Nation	cnation@meetingone.com

At the bottom of the window, there are three buttons: "Add", "Delete", and "Close".

ADD A NEW USER

To add a new user, click on the *Add* button. Another popup will appear labeled *User Properties*. Fill in all of the required fields and click on the *Save* button.

A screenshot of a "User Properties" dialog box. The dialog box contains the following fields and labels:

- User Name (Email)*
- First Name*
- Last Name*
- Password* (with a note: "6 or more characters and at least one of lower case, one of upper case, and one numeric.")
- Confirm Password*

At the bottom of the dialog box, there are two buttons: "Save" and "Cancel".

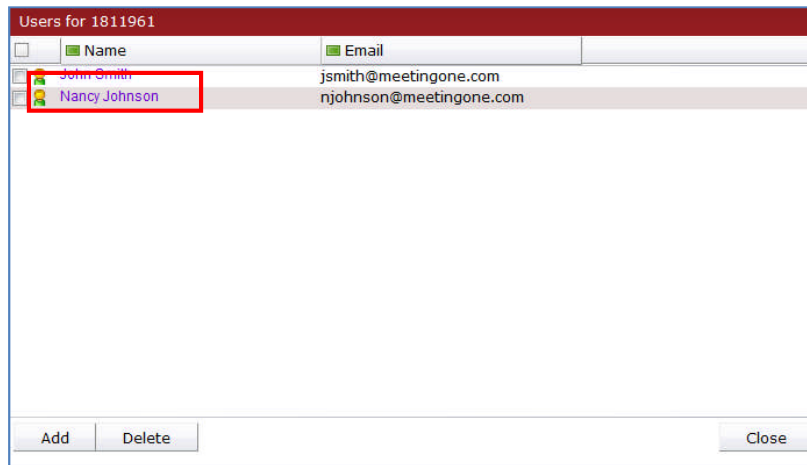
Below the dialog box, the "Add", "Delete", and "Close" buttons from the previous window are visible.



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EDIT AN EXISTING USER

You can edit a user by clicking on their name.



A *User Properties* box will appear, allowing you to edit the First and Last Name fields. At the bottom left of this window is a *Reset Password* button. Click on this button to reset the user's password; when you click the button an email will be sent to the user's email address notifying them of the password change.



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User Properties

User Name (Email)* njohnson@meetingone.com

First Name* Nancy

Last Name* Johnson

Reset Password Save Cancel

DELETE AN EXISTING USER

You can delete a user by selecting the checkbox next to their name and then clicking *Delete*.

Users for 1811961

<input type="checkbox"/>	Name	Email
<input type="checkbox"/>	John Smith	jsmith@meetingone.com
<input checked="" type="checkbox"/>	Nancy Johnson	njohnson@meetingone.com

Add Delete Close



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MANAGE DIRECTORY

The *Manage Directory* button will take you to the Directory tab. From there you can add, remove, and edit participants in your directory. Please see the Directory section for more information on the directory.

PRINT WALLET CARDS

Wallet cards are printed from within Online Account Management. If you wish to print a wallet card with your conference information on it, click on the *Print Wallet Cards* button. A new browser window will appear with the template for your wallet card. You can print the template, cut it out, and fold in half to easily fit in a wallet.

 		Phone Key Prompts All Commands start with the '*' and end with the '#' key.	
Company Name:	Test account for OAM guides	Step 1: Dial your Access Number.	Audio Prompts Off/On *48#/*480#
Host Name:	John Smith	Step 2: Dial your Conf. Room.	Dial Out to a Participant *Tel. Number#
Access Number:	(800) 832-0735	Step 3: Dial * your Host PIN #.	Assign Billing Code *77*xxxxx#
Conference Room:	1811981	Customer Service	*0# Lock/Unlock Conference *14#*10#
Host PIN:	(confidential)	Menu of Commands	*6# Roll Call On/Off *50#/*500#
Int'l Dial-In:	(303) 330-0440	Mute/Un-mute Participants	*4#/*40# Start/Stop Recording *51#/*510#
		Participant Self Mute/Un-mute	*# End Conference *5#
		Host Self Mute/Un-mute	*46#/*460# Doorbell Off/On *47#/*470#
		One Resource: www.meetingone.com/customer_center for complete features, commands, and access numbers	
AUDIO AND WEB CONFERENCING WWW.MEETINGONE.COM		Customer Service: 1.888.523.8445 or support@Meetingone.com	



RESET HOST PIN

The *Reset Host PIN* button allows you to change your host PIN to a different, random, 6-digit PIN. When you click the button, a pop up will appear, asking if you're sure you wish to reset the PIN. Select *Ok* if you wish to proceed with the PIN change.

SETTINGS TAB

The *Settings* tab lists default settings for your audio conference. These settings will always be applied to your room. There are two sections for settings: *Room Settings* and *In Call Features*.

The *Rooms Settings* section is available to view only; you are not able to edit any of these settings. The *In Call Features* are able to be edited; all of these settings can also be changed while the conference is active using DTMF commands or Click&Meet. If you make changes using DTMF commands or Click&Meet, the changes will only apply for the current call. To make a change permanent for all calls, you'll need to edit the setting in Online Account Management.

The screenshot shows the MeetingOne Settings interface. At the top, there are navigation tabs: Home, Settings (selected), Recordings, Reports, and Directory. The main content area is divided into two sections: Room Settings and In Call Features.

Room Settings

Setting	Default
Maximum Participants:	150
Maximum Subconferences:	8
Maximum Inactive Time:	90
Waiting Time:	5
Minimum Billing Code Size:	4
Maximum Billing Code Size:	20
Maximum Duration:	0
Allow Domestic Dialouts:	Yes
Mandate Billing Code:	No

In Call Features

Setting	Default	Options
Mute All:	Default	No
Disable Participant Self Mute:	Default	No
Disable Doorbell:	Default	No
Ring Doorbell on Dialout:	Default	Yes
Disable Prompts:	Default	No
Prompt for Language:	Default	No
Prompt for Listener Count:	Default	No
Access Mode:	Default	OPEN
Access Code:		
Roll Call Mode:	Default	NONE
Language:	Default	en
Default Billing Code:		

At the bottom right of the In Call Features section, there are buttons for **Save** and **Cancel**.

At the bottom of the page, there is a footer with the following text: Copyright 2011, MeetingOne Home, Terms and Conditions, and Customer Service (1-888-523-8445).



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IN CALL FEATURES

Below is a list of the settings that can be changed and what they do:

- **Mute All:** Yes/No setting that mutes all participants (NOT the host) entering the conference when set to Yes. When set to No all participants joining the conference will join un-muted. When this is set to Yes participants joining muted will not be able to un-mute their own lines unless Participant Self Mute is enabled.
- **Disable Participant Self Mute:** Yes/No setting that will allow participants to mute and un-mute their lines when set to No. When set to Yes, participants will not be able to mute and un-mute themselves.
- **Disable Doorbell:** Yes/No setting that will turn off the doorbell chime for participants entering the conference on dial out or dial in when set to Yes. When set to No a chime will play for every participant that enters the conference.
- **Ring Doorbell on Dialout:** Yes/No setting that will turn off the doorbell chime for participants entering the conference on DIALOUT only when set to No. When set to Yes, a chime will play every time a participant joins the call via dialout.
- **Disable Prompts:** Yes/No setting that will turn off audio prompts to the conference when set to Yes. When set to No, all audio prompts will play to the audio conference. ****Note**** Some audio prompts cannot be disabled, even when this setting is set to Yes. They include the recording and un-muting prompts.
- **Prompt for Language:** Yes/No setting that will prompt entering participants to choose a language they wish to hear their audio prompts in during the conference when set to Yes. When set to No, participants will not be prompted to choose a language they wish to hear prompts in.
- **Prompt for Listener Count:** Yes/No setting that will prompt entering participants to enter a number corresponding to the number of people listening to the audio conference at their location when set to Yes. When set to No, participants will not be prompted to enter the number of people listening to the audio conference.
- **Access Mode:** This setting changes how participants can enter the Audio Conference. There are 6 different types of access.
 - **Open:** This lets participants join the conference at any time after the host has opened the conference; there is no restriction in this mode.
 - **Locked:** This allows the host to lock the room; no participant can enter the conference unless dialed out to by the host in this mode.
 - **Code:** This allows the host to set a 4 to 6 digit access code that all participants must enter before they can enter the conference. The Access Code is entered in the Access Code field.
 - **IAC:** This allows the host to required individual access codes; participants must enter their IAC to join the conference. Individual Access Codes (IACs) are created in the directory; if IACs are not created in the directory, the participants will not be able to join the conference.
 - **Code_IAC:** This allows a host to set a general access code that all participants must enter as well as an IAC that participants must enter. The Access Code is entered in the Access Code field. . Individual



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Access Codes (IACs) are created in the directory; if IACs are not created in the directory, the participants will not be able to join the conference.

- **Screened:** This forces participants to wait in the waiting lounge until the host lets them into the conference one by one.
- **Access Code:** This is where the host enters an access code that they would like participants to enter when access modes are set to Coded or Code_IAC. If either of these access modes are selected, the Access Code field is required. Access codes can only be 4 to 6 digits, and can only be numeric.
- **Enable IAC on Dialout:** From within an Adobe Connect meeting room, if the host has allowed it, a participant can dial out to themselves. This setting would require a participant to enter an IAC once they've dialed out to themselves to join the conference. Individual Access Codes (IACs) are created in the directory; if IACs are not created in the directory, the participants will not be able to join the conference.
- **Roll Call Mode:** Roll Call Mode asks participants calling into the conference to say their first and last name. When they join the conference their name is either played to the entire conference or to the host only. The host can also decide to play the recordings of people's names on demand.
 - **None:** Will disable Roll Call Mode.
 - **On_Demand:** Will save the recordings of people's names so that the host can play them back later in the conference.
 - **Announce_Host:** Will announce participant's names to the host only when they join the conference.
 - **Announce_Conference:** Will announce participant's names to the entire conference when they join the conference.
- **Language:** This setting changes what language the conference hears prompts in. The options are: Dutch, English, UK English, French, German, Japanese, and Spanish.
- **Default Billing Code:** The default billing code is a billing identifier that can be assigned to a conference room. The default billing code will be set for all audio conferences that take place.

ROOM SETTINGS

Below is a list of settings that you cannot change yourself and what they do. If you'd like to have one of these settings changed, contact your account administrator or MeetingOne customer service.

- **Maximum Participants:** This determines how many people can join an audio conference simultaneously.
- **Maximum Subconferences:** This limits the number of subconferences that can be opened in an audio conference. Currently a maximum of 20 subconference rooms can be created in an audio conference.
- **Maximum Inactive Time:** If the host accidentally disconnects from the conference while participants are still in the call, the conference will remain open for a specified duration. This setting tells the conference how long to stay open after a host has disconnected from the call. This setting is in minutes.
- **Waiting Time:** When a participant calls into an audio conference and the host has not opened the conference room yet, they will sit in the waiting lounge for a specified amount of time before being



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disconnected. This setting determines how long participants can wait in the waiting lounge before they are automatically disconnected from the system.

- **Minimum Billing Code Size:** By Default, when entering a billing code, the conference host must enter a billing code equal to or longer than 4 digits. This setting shows what the minimum billing code has been set to. It cannot be less than 4 digits, but the minimum can be increased up to 20 digits.
- **Maximum Billing Code Size:** By Default, when entering a billing code, the conference host must enter a billing code equal to or less than 20 digits. This setting shows what the maximum billing code has been set to. It cannot be more than 20 digits, but the maximum can be decreased as low as 4 digits.
- **Maximum Duration:** A hard limit can be set on how long a conference is allowed to be open. This setting limits how long a conference may remain open. If no value is entered, the system default is used which allows conferences to remain open a maximum of 23 hours and 59 minutes.
- **Allow Domestic Dial outs:** This is a Yes/No setting that will allow or disallow dial outs to numbers in the US.
- **Allow International Dial Outs:** This is a Yes/No setting that will allow or disallow dial outs to numbers outside of the US.
- **Mandate Billing Code:** This is a Yes/No setting that will require the conference host to enter a billing code after entering their host PIN if set to Yes. The host will not be able to enter the conference if they do not enter a valid billing code. When set to No this setting will not require a billing code be entered by the room host.

RECORDINGS TAB

This tab allows the user to access all recordings that have been captured by the audio room they are logged in under. All recordings are kept for 30 days only. When you click on the *Recordings* tab, all recordings for the room will appear. You can save the recording to your computer in .wav or .mp3 format. Click on the file type (located under the download column) you wish to download.

Home	Settings	Recordings	Reports	Directory					
Room	Date	Time	Duration	Download	Expiration				
8663950963	2011-04-07	09:18:07-06:00	00:00:42	.wav, mp3	2011-05-07				
8663950963	2011-04-08	15:24:47-06:00	00:01:08	.wav, mp3	2011-05-08				



REPORTS TAB

From the Reports tab, you can view and download usage and billing reports. Simply enter the Start Date and the End Date, and then click the Run Report button. A list of conferences that took place during the selected date range will appear. Clicking on the date of one of the conferences will show the conference details, including participants and entry times.

Reports can be saved to your local machine. To do this, click on either the Export as Excel button or the Export as PDF button. After clicking the button that corresponds to your preference, you will be able to save the spreadsheet to your computer. ***NOTE*** You MUST turn off pop-up blockers for this to work.

The screenshot shows the MeetingOne Reports interface. At the top, there are navigation tabs: Home, Settings, Recordings, Reports (selected), and Directory. Below the tabs, there are input fields for Start Date (2010-04-30 14:08), End Date (2011-01-31 14:08), and Billing Code. A Run Report button is visible. To the right, two buttons are highlighted with a red box: Export as Excel and Export as PDF. Below the form is a table with the following columns: Date, Time, Room, Count, Type, Billing Code, Length (in Min.), Accum. Min., and Charge. The table contains multiple rows of data representing individual conference calls.

Date	Time	Room	Count	Type	Billing Code	Length (in Min.)	Accum. Min.	Charge
5/3/2010	8:55:35 AM	8882759209	2	MO_Pro		0.5	0.7	\$0.19
5/3/2010	12:35:52 PM	8882759209	5	MO_Pro		1.8	3.6	\$0.96
5/5/2010	11:40:52 AM	8882759209	1	MO_Pro		27	27.1	\$7.05
5/5/2010	1:04:05 PM	8882759209	1	MO_Pro		0.4	0.5	\$0.13
5/17/2010	9:30:27 AM	8882759209	1	MO_Pro		0.6	0.7	\$0.19
5/17/2010	12:00:14 PM	8882759209	1	MO_Pro		0.4	0.2	\$0.06
5/17/2010	12:00:37 PM	8882759209	1	MO_Pro		0.9	0.7	\$0.19
5/17/2010	1:15:46 PM	8882759209	4	MO_Pro		2.5	5.0	\$1.32
5/17/2010	1:23:48 PM	8882759209	2	MO_Pro		2.1	2.6	\$0.69
5/17/2010	1:56:45 PM	8882759209	2	MO_Pro		12.2	23.3	\$6.06
5/18/2010	4:49:35 PM	8882759209	1	MO_Pro		0.2	0.3	\$0.08
5/20/2010	5:00:32 PM	8882759209	1	MO_Pro		0.3	0.4	\$0.11
5/27/2010	5:06:19 PM	8882759209	1	MO_Pro		5.5	5.2	\$1.36
5/28/2010	6:42:19 AM	8882759209	5	MO_Pro		58.7	19.0	\$4.96
5/28/2010	11:01:43 AM	8882759209	6	MO_Pro	null	20.3	22.6	\$5.91
6/2/2010	8:40:58 AM	8882759209	2	MO_Pro		1.5	2.6	\$0.68
6/8/2010	11:08:15 AM	8882759209	1	MO_Pro		0.9	1.0	\$0.26
6/8/2010	11:09:32 AM	8882759209	1	MO_Pro		0.8	0.8	\$0.21
6/8/2010	11:10:52 AM	8882759209	1	MO_Pro		0.8	0.9	\$0.24
6/8/2010	11:11:57 AM	8882759209	2	MO_Pro		0.4	0.6	\$0.14
6/9/2010	12:56:39 PM	8882759209	1	MO_Pro		0.4	0.2	\$0.06
6/9/2010	1:11:20 PM	8882759209	1	MO_Pro		0.4	0.2	\$0.06

To drill down into a specific call, click on the date. This will change the view so that you can see all participants that dialed in for the call. An Excel or PDF file can be exported for the individual audio conference view as well by using the Export as Excel or Export as PDF buttons.

For the call details, you will see the following column headings:

- **Connect:** Time when host or participant connected to the audio conference. * designates the host.
- **Disconnect:** Time when host or participant disconnected from the audio conference.
- **Services:** Shows the service the host or participant dialed in on.



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- **Access #:** Shows the number that the host or participant dialed to reach the audio conference.
- **Participant#:** Shows the phone number of the host or participant.
- **Name:** Shows the name of the host or participant as they were named in the conference.
- **Length (in Min.):** Shows the duration that the host or participant was dialed in to the audio conference.
- **Charge:** Shows the charge accumulated by the host or participant.

You can return to the view of all of your conferences by clicking on the *Up* button. This will go up one level from the view you are currently viewing.

The screenshot shows the 'Reports' tab in the MeetingOne interface. At the top, there are navigation tabs: Home, Settings, Recordings, Reports (selected), Directory, and History. Below the tabs are search filters for Start Date (2010-04-30 14:08), End Date (2011-01-31 14:08), and Billing Code, along with a 'Report' button and 'Export as Excel' and 'Export as PDF' buttons. The main area contains a table with columns: Connect, Disconnect, Services, Access #, Participant #, Name, Length (in Min.), and Charge. The first row of data is highlighted, and a red box highlights an 'Up' button in the 'Connect' column of that row.

Connect	Disconnect	Services	Access #	Participant #	Name	Length (in Min.)	Charge
12:35:40 PM	12:37:40 PM	MO_Pro	8882759209	3032440019	*Matt Griffin	2.0	\$0.52
12:36:00 PM	12:36:00 PM	MO_Pro	8882759209	7202530745	7202530745	0.2	\$0.06
12:36:22 PM	12:36:22 PM	MO_Pro	8882759209	17202530745	17202530745	0.1	\$0.03
12:36:29 PM	12:37:29 PM	MO_Pro	8882759209	7202530745	7202530745	1.1	\$0.29
12:36:41 PM	12:36:41 PM	MO_Pro	8882759209	7202352580	7202352580	0.2	\$0.06

DIRECTORY TAB

The *Directory* tab is used to create and manage participant profiles and associated default settings.



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The screenshot shows the MeetingOne web interface with the 'Directory' tab selected. The 'Participant Management' section contains buttons for 'Add', 'Edit', 'Delete', and 'Show Group'. On the left, there are buttons for 'Directory Upload', 'Show All', 'IAC Look up', and 'Clear Directory'. The main area displays a list of participants: 'Amy Smith', 'Andy Jones', 'Bob Smith', and 'New Person'. A vertical alphabetical index (A through R) is on the right.

PARTICIPANT MANAGEMENT

ADD PARTICIPANT TO DIRECTORY

To add a new participant to the directory, click on the *Add* button. A window will appear labeled *Participant Info*.

The 'Participant Info' dialog box contains the following fields and options:

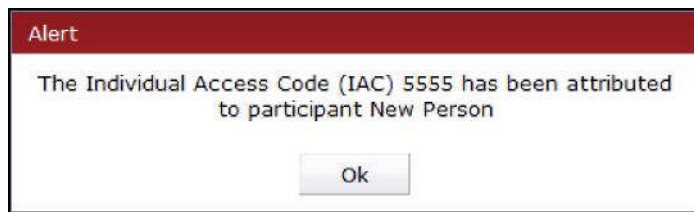
- Name: New Person
- Phone #: 1234567890
- Individual Access Code: 5555
- # of simultaneous users of the Individual Access Code: 1
- Language: Default
- Sub Conference #: 0
- Access Authorized
- Muted
- Groups belonged to: (empty text box)
- Buttons: Save, Cancel



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In the *Participant Info* pop up, enter the participant's name (this is the only required field); and if desired enter the phone number and Individual Access Code of your choice. When the Access Mode is set to IAC (or Individual Access Code) in the audio room *Settings* tab, participants must enter a code that has been individually assigned to them. The only way to assign a code to a participant is to create them in the Directory and assign them a 4 to 9 digit code. Participants will be named upon entering the conference if their phone number correlates to one in the directory or they enter an assigned IAC.

After creating a new participant, if you only enter information in the *Name* field, you will see a confirmation window that tells you what IAC has been assigned to them.



If you choose to enter a *Phone #* for the participant you are creating, every time that number calls into the conference it will be automatically named by the directory. This is usually done for speakers or people who call into the conference using the same phone number regularly.

If you want to specify an *Individual Access Code* instead of having the system generate one, field will only accept a 4 to 9 digit code that has only numbers in it.

A description of the other directory fields follows:

- **# of Simultaneous Users of the Individual Access Code:** determines how many participants calling into the conference will be allowed to enter the Individual Access Code. The default is 1.
- **Language:** determines what language the participant will hear audio prompts in. The participant will only hear the language assigned if they enter their IAC.
- **Sub Conference:** allows the user to determine where the participant will go after they join the conference. It defaults to 0, which is the main conference. The participant will only join the sub-conference that has been set if they have entered their IAC.
- **Access Authorized Checkbox:** allows the user to activate or deactivate a participant's rights to join the conference. When this box is NOT checked, participants will not be able to join the conference using their IAC.



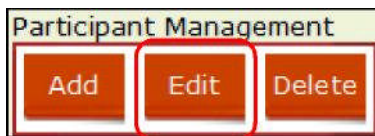
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- **Muted Checkbox:** allows for the participant to be muted upon entry of their IAC. The participant will be muted when they enter their IAC if the *Muted* box has been checked.

To create the participant you have just entered information for, click on the *Save* button. The participant will now appear in the list of participants on the left side of the directory.

EDIT PARTICIPANT

To edit a participant that already exists in the directory, find their name and click on it to highlight. Then click on the *Edit* button above the participant list.



The *Participant Info* window will appear; from here you can change any information in the *Participant Info* window.

A screenshot of the 'Participant Info' window. The window has a title bar with 'Participant Info' and a close button. The form contains the following fields and controls:

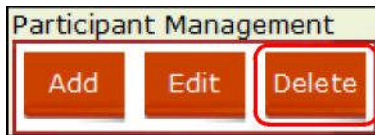
- Name: Text box with 'New Person'
- Phone #: Text box with '1234567890'
- Individual Access Code: Text box with '5555'
- # of simultaneous users of the Individual Access Code: Text box with '1'
- Language: Dropdown menu with 'Default'
- Sub Conference #: Dropdown menu with '0'
- Access Authorized: Checked checkbox
- Muted: Unchecked checkbox
- Groups belonged to: Empty text box
- Save and Cancel buttons at the bottom right.

DELETE PARTICIPANT

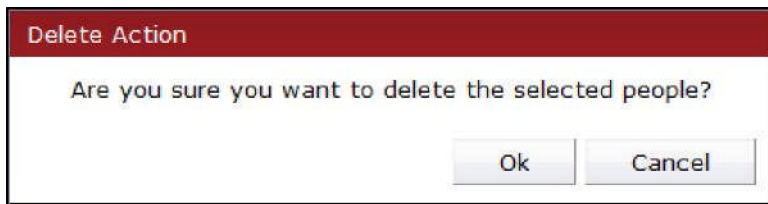


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To delete a participant's (or multiple participants') profile from the Directory, select their name and then click on the *Delete* button above the participant list.



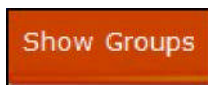
After you click on the *Delete* button you will see a warning appear asking if you are sure you wish to delete the user(s).



Click on the *Ok* button and the participant profile will be deleted and removed from the directory.

GROUPS

Groups are a way for the host to sort and manage a pre-selected group of participants. The user can create as many groups as they wish, and can assign participants to whichever groups they wish. The Groups section of the directory does not appear automatically, the user must click on the *Show Groups* button to be able to manage groups.



ADD GROUPS

To create a new group, click on the *Add* button in the *Group Management* section.



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A window will appear labeled *Add Group*, fill in the *Name* and *Description* fields and then click on the *Save* button.



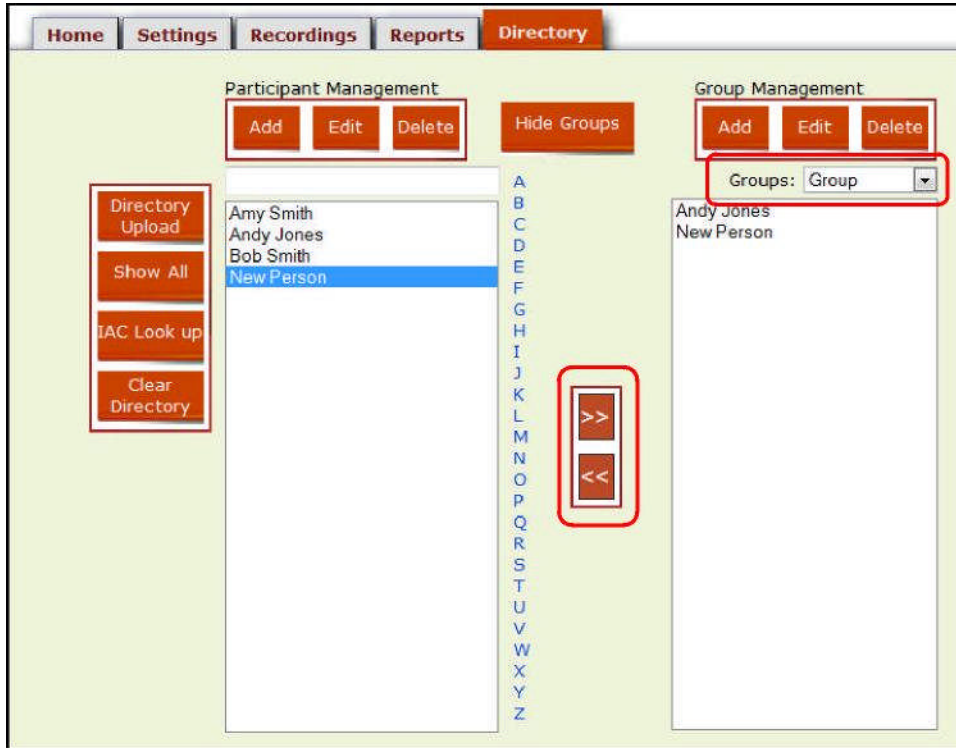
The new group will be created and should now appear in the dropdown below the *Group Management* box.

ADD / REMOVE PARTICIPANTS IN GROUP

Add/Remove participants to a group by selecting the group from the dropdown below the *Group Management* area. Then select a participant name and click on the arrows pointing from the *Participant Management* area to the *Group Management* area.



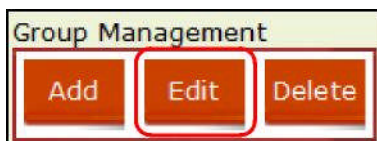
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When a participant has been added to a group, a window will appear confirming that the participants were successfully added.

EDIT GROUP

Editing a group allows the user to change the group name or description. To edit a group, click on the *Edit* button in the *Group Management* section.





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This will bring up a window that shows the group name and the description. When you are finished making changes, click on the *Save* button and your information will be saved.

A dialog box titled "Group Details - Group" with a dark red header. It contains two text input fields: "Name:" with the text "Group" and "Description:" which is empty. At the bottom, there are two buttons: "Save" and "Cancel".

DELETE GROUP

Deleting a group will remove a group but will not affect any participant profiles that exist in that group. To delete a group, select the group you wish to delete from the dropdown of groups.

A screenshot of a "Groups:" dropdown menu. The current selection is "Super". The dropdown list is open, showing options: "Group" (highlighted in blue), "Super", and "Super Group". To the left of the dropdown, the name "Amy Smith" is visible.

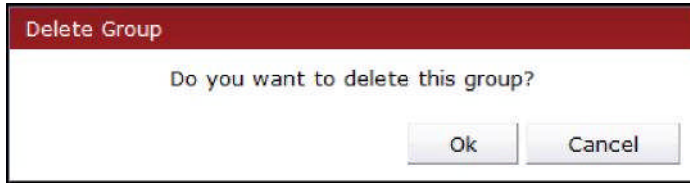
Then click on the *Delete* button under the *Group Management* section.

A section titled "Group Management" containing three buttons: "Add", "Edit", and "Delete". The "Delete" button is highlighted with a red rectangular border.

You will see a warning asking if you wish to delete the group.



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Click on the Ok button, and the group will be deleted. The group will no longer appear in the dropdown that displays existing groups. Groups that contain participants will NOT delete the participants that have been assigned to the deleted group.

DIRECTORY UPLOAD

The directory upload allows the user to create multiple participants and groups at once using a spreadsheet. To use the directory upload, click on the *Directory Upload* button to the left of the *Participant Management* area.



A window will appear with basic directions for using the directory upload. From this window, you can download the Excel Template needed to upload. Complete the template and save it. Then complete the following fields needed in order to upload the spreadsheet:

- **Email Address:** Allows you to enter the email address where you would like to receive the confirmation email.
- **Overwrite Current Directory:** By checking this box, you will delete your current directory and replace it with the one you are about to upload.
- **Default Sub-Conf Room:** Field will only affect participants that do not have either field completed on the upload spreadsheet. The Default Sub-Conf Room field designates which sub-conference the participant will join when they enter their IAC upon joining the conference.



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- **# Users Per IAC Code:** Field will only affect participants that do not have either field completed on the upload spreadsheet. The # Users Per IAC Code field designates how many people can use the same IAC at one time during the audio conference.

Directory Upload

Using this excel file, upload to add participants to your directory.
[Excel Template](#)

Email	cnation@meetingone.com
Room Number	5067255
Overwrite Current Directory?	<input type="checkbox"/>
Default: Sub-Conf Room	0 ▾
# Users Per IAC Code	1
File to Upload	<input type="button" value="Browse..."/> No file selected.

Spreadsheet Column Headers

AlternativeName: Alternative Name used for directory member.

PrimaryName: Primary Name for directory member.

AttendeePhone: Directory member contact phone number.

AccessCode: (IAC) Individual Access Code.

AttendeeGroup: Group name that member will be added too.

ListenOnly: A value of "Yes" will set this user to muted, "No" will allow them to speak.

SubConfNum: Default Sub-Conference that member will join upon entering conference.

UsersPerIAC: # of participants that can use the assigned AccessCode (IAC) per conference.

File to Upload: Browse to the completed, saved Excel template with the participant and group information you wish to add. As soon as you select the file, the system will automatically start the upload process. The sample Excel template is shown below as it will appear when opened in Microsoft Excel.

	A	B	C	D	E	F	G	H
1	AlternativeName	PrimaryName	AttendeePhone	AccessCode	AttendeeGroup	ListenOnly	SubConfNum	UsersPerIAC
2	Company One	Andy Jones	303-555-0123	1526	Group One	No	0	1
3	Company Two	Amy Smith	303-555-1234	9999	Group Two	No	0	1
4	Company Three	Bob Smith	303-555-2345	8888	Group Three	Yes	0	1



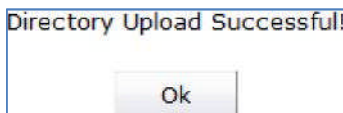
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The only required field is the Primary Name field. All other fields will either be auto generated, pre-set to default settings, or ignored by the upload tool, if not completed.

- **PrimaryName:** What is entered in this field appear as the participant's name when they join the audio conference and also on conference reports. This is a required field.
- **AttendeePhone:** Enter the participant's phone number. If a participant joins a conference, but doesn't enter their IAC, if their phone number is the same as the one you entered in the directory, they will automatically be named according to the directory. This field will be ignored if nothing is entered in it.
- **AccessCode:** This is a 4 to 9 digit Individual Access Code that the participant can enter to join the conference. They can also enter their code at any time after they join the conference, if not required upon entry. When the participant enters their Individual Access Code, all of the settings (ListenOnly, SubConfNum, and Name) will be applied to them. This field will be automatically populated with a randomly created number by the upload tool if not filled in.
- **AttendeeGroup:** This will both create a group and assign the participant to that group. If left blank this field will be ignored. To assign multiple participants to the same group, enter the same group name for all participants you wish to assign to the group. Only one group will be created per unique group name.
- **ListenOnly:** Yes will mute the participant, no will leave them un-muted. This setting will only be applied when the participant enters their Individual Access Code.
- **SubConfNum:** Will send a participant to sub-conference 0-20 when they enter their Individual Access Code. 0 is the main conference and 1-20 are sub-conferences. This will only be applied when a participant enters their Individual Access Code and when sub-conferences have been turned on in the audio conference.
- **UsersPerIAC:** Limits how many participants use the Individual Access Code simultaneously. If set to 1, the Individual Access Code will only work for one participant; if set to 5, five participants will be able to gain access to the conference using that same Individual Access Code.

If nothing is entered into the *SubConfNum* and *UsersPerIAC* fields, they will be assigned based on the information entered by the user on the *Directory Upload* window. The *ListenOnly* field will automatically be set to *No* if nothing is entered by the user, which means everyone will be un-muted upon joining.

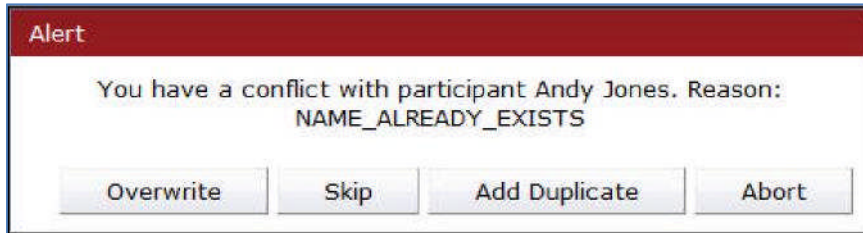
After you have uploaded the directory, you will see a message telling you that your upload was successful.



If you attempt to upload a spreadsheet that contains participant names that already exist in your current directory, you will see the following message:

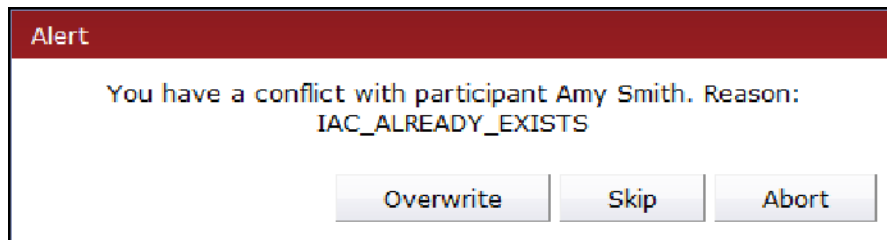


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Click *Overwrite* to delete the old entry named Andy Jones and replace them with the Andy Jones from your spreadsheet. Click *Skip* to keep the Andy Jones that exists in your current directory and not add the Andy Jones from the spreadsheet. Click *Add Duplicate* to keep the existing Andy Jones AND add the new Andy Jones from the spreadsheet. Click *Abort* to cancel the entire upload.

If you attempt to upload a spreadsheet that contains an Individual Access Code that already exists in your current directory, you will see the following message.



Because the directory does not allow duplicate Individual Access Codes, you do not have the option to add a duplicate in this scenario. The Overwrite and Skip actions are the same as the previous Alert window. *Overwrite* will delete the existing participant that belongs to the conflicting Individual Access Code and will add the participant from the spreadsheet. *Skip* will retain the existing participant and will ignore the participant in the spreadsheet and move on to the next person. *Abort* will cancel the entire upload.

When the *Directory Upload* is successfully completed you should see all new participants and groups appear immediately.

SEARCH DIRECTORY FEATURES

Users can search the directory by entering the search criteria in the search field, or by the first letter of a person's name. The search letters run down the right side of the *Participant Management* area. By clicking on one of the



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search letters the user will only see participant profiles that begin with the letter clicked on. For example, if the user is attempting to find everyone whose name starts with S, they would click on the S search button.

MY PROFILE BUTTON

The *My Profile* button in the upper right corner of the window is where the user can change their profile information and reset their password.



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Profile

My Info

Company: Bob Smith

First Name: John

Last Name: Smith

Mailing Address:

Email: jsmith@meetingone.com

Phone:

Save Cancel

Reset Password

Old Password*

New Password*

Confirm Password*

Reset

Current Default Role: None

Check this to turn off default role.

Save

Close

To change the *My Info* fields, make the necessary changes and click on the *Save* button.

To reset your password, enter your old password in the field provided. Enter your new password and confirm it. Click on the *Reset* button, your password will be reset.

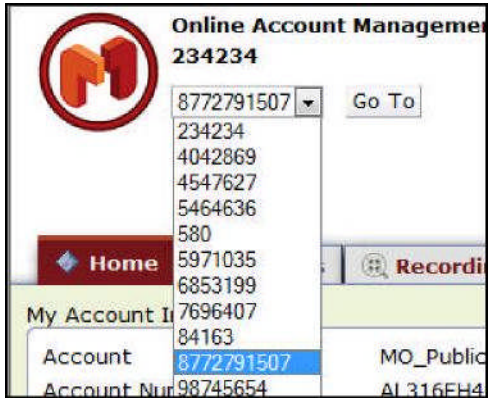
A host or room user cannot change their email address themselves. The account administrator must change the email address.

OTHER USER INTERFACE FEATURES - TOGGLE AUDIO ROOM

If you have access to more than one audio conference room, you will be able to toggle between your conference rooms.



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To toggle between conference rooms, click on the dropdown located in the upper left corner of your screen (located just below the MeetingOne logo). This will display all of your conference rooms in numerical order. Select one and click on the *Go To* button; you will be taken to the room you have selected.