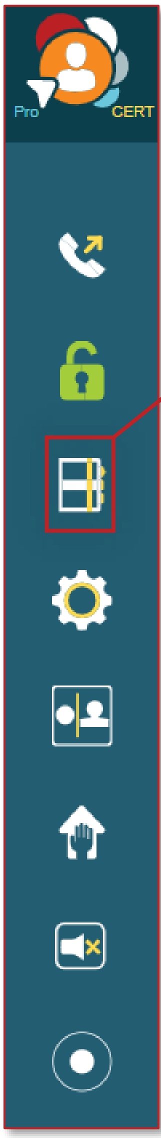
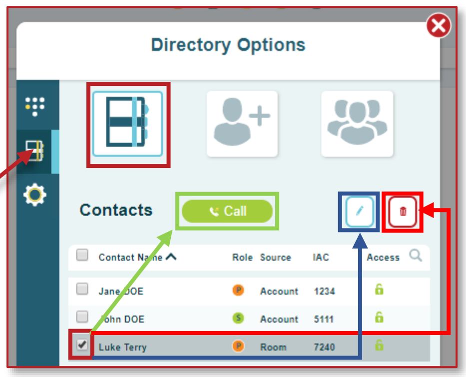
Directory Management

The **Directory** is where you manage participant information. You can access, edit, add, delete and manage roles for your directory entries. You can manage groups and how participants enter your conference.

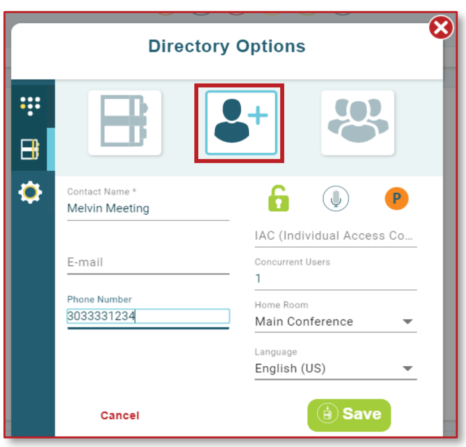


Directory – Opens the Directory options window from when you can **call, delete, edit** or **add** a participant



- Call Contact – Select one or more contacts by placing a check in front of their name > Click the buttons Call > then Call Now from the confirmation windows.
- **Edit** Contact details – Select contact by placing a check in front of the desired name > Click on the pen button > change the contact information and before you Save the details, choose options :
  - **Access Authorized** , or **not**
  - Enter Conferenced **muted** /**unmuted**
  - Default role **(Participant** **/Speaker** **)**
- **Delete** Contact – Select one or more contacts by placing a check in front of their name > Click on the trash can button > then **Delete** from the confirmation windows.

Window to add and edit a contact



- **Add** Contact – Click the button
  - Enter Contact information
    - Contact Name – (Required)
    - Email
    - Phone Number
    - Choose options :
      Access (Un-) Authorized, Enter Conferenced muted/unmuted and Default role (Participant/Speaker)
    - IAC – Individual Access Code: if you do not enter one the system will generate one for you
    - Home Room – Assign a specific sub-conference room if necessary
    - Language – Choose participant language for audio prompts
  - Click Save.

NOTE: *Multiple Contacts **CANNOT** have the same Name, Phone Number and/or e-mail.*

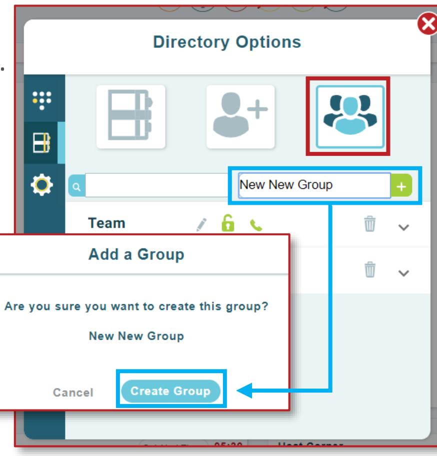
Directory Management, continued

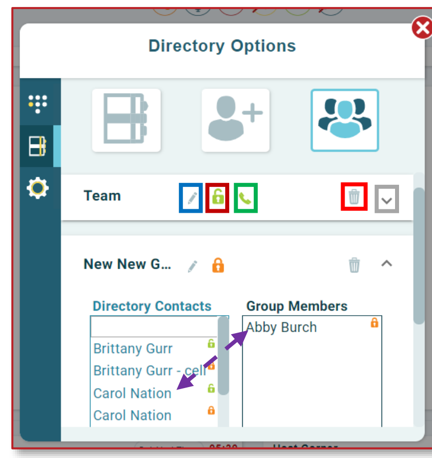
Group Management – Use Groups to allow a group of participants access to a specific session. You can have multiple groups, however only **one** group can be **enabled** at a time.

**Coded IAC (individual access code) Access Mode is strongly recommended when using Directory Groups. See Access Modes for more information.*

Click the **Group** button

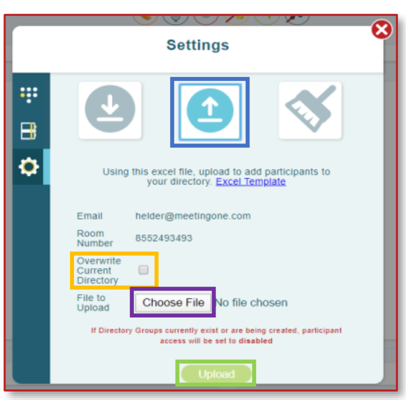
- **Create a Group** – Enter a group name and click the **+** icon to the right of the input field > then click **Create Group** button in the confirmation window.
  - The new group will appear on the list
  - Click the drop-down **V** icon to view, **modify existing group members** or add contacts to the group
    - Click and drag Contacts from the **Directory Contacts** list to the **Group Members** list to add them to the group (or vice versa to remove them).
- **Edit Group Name** – Click the pencil icon next to the group name to make the name an editable field – change the name of the group then press Enter on your computer to Save the modification.
- **Enable/Disable Group** – Enable or disable the group for the active session click the **Padlock** icon:
  - **Green and Open Padlock** – the group is **Enabled**.
  - **Orange and Closed Padlock** – the group is **Disabled**
- **Call Group Members** – Click on the phone icon to dial out to the entire group > then **Call Now** button from the confirmation windows.
- **Delete Group** – Click the trash can icon next the group you would like to delete > then click on the **Delete** button from the confirmation windows.



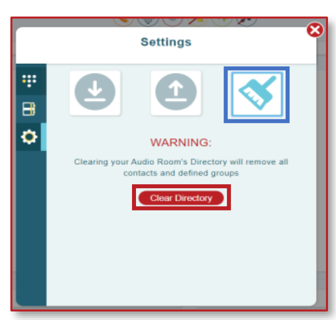


Directory Settings >

Directory Download – Click the download button > Select the directory type you wish to download (**Room**, **Group**, **Account**) > Click **Download**. Report will be downloaded to your machine.



Directory Upload in C&M – Click the upload button > Download the Excel template > Enter participant information in this file > Check (if applicable* Erases and overwrites current directory) ***Overwrite Current Directory*** > Click **Choose File** > Select the saved Directory excel file from your machine > click **Upload**.



Clear Directory – Click brush button > Click **Clear Directory** button