

GoToMeeting®

Administrator Guide

GoToMeeting

GoToWebinar

GoToTraining

OpenVoice



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Get Started with the Admin Center

The Admin Center is where account administrators can add and manage users, create reports and oversee default and custom settings. As a GoToMeeting, GoToWebinar, GoToTraining and/or OpenVoice administrator, you can [log in](#) to invite and manage organizers, group managers and administrators.

The screenshot displays the Citrix Online Admin Center interface. The top navigation bar includes links for Admin Service, OpenVoice, GoToMeeting, GoToWebinar, GoToTraining, Admin Center, and 24/7 Support. The main content area is titled 'Manage Users' and features a filter dropdown set to 'All Users' and a search bar containing 'ml'. A table lists six users with their respective groups, statuses, and product icons. The 'Max Million' user is selected, and a 'Manage Seats' dropdown menu is open, showing options to change seats for GoToMeeting 25, GoToWebinar 1000, GoToTraining, OpenVoice, or to remove all seats. The 'Remove All Seats' option is checked. Below the table, there are buttons for 'Delete Users', 'Group Users', and 'Export to Excel'.

Name	Group	Status	Product
Jimmy James - Admin		Enabled	GoToMeeting 25, GoToWebinar 1000, GoToTraining, OpenVoice
June Jeez	1	Enabled	GoToMeeting 25, GoToWebinar 1000
Mario Manman	1	Enabled	GoToMeeting 25, GoToWebinar 1000, GoToTraining, OpenVoice
<input checked="" type="checkbox"/> Max Million	1	Enabled	GoToMeeting 25, GoToWebinar 1000, GoToTraining, OpenVoice
May Moore	1	Enabled	GoToMeeting 25
Sally Strawberry	1	Suspended	

1 Selected

Manage Seats | Delete Users | Group Users | Export to Excel

Change Seat to

- GoToMeeting 25
- GoToWebinar 1000
- GoToTraining
- OpenVoice
- Remove All Seats

Apply Changes

Add Users

You can add users to your account and assign them with organizer and/or account administrator roles. A user's first name and last name cannot exceed 32 characters. An email address cannot exceed 128 characters.

Add users to your account

1. [Log in](#) to the Admin Center.
2. Select **Add Users** in the left navigation.
3. On the Add Users page, enter the user's first name, last name and email address. Each user logs in to GoToMeeting/GoToWebinar/GoToTraining/OpenVoice with the email address you provide. Click **Add Another User** to add a new user at the same time.

To add multiple users at once, click **Add Multiple Users** and input users' first names, last names and email addresses in the text field. You must separate each user with a comma or semicolon, or press **Enter/Return** on your keyboard.

Name and Email Address

First Name	Last Name	Email Address
First Name	Last Name	Email Address ✖

[Add Multiple Users](#) | [Add Another User](#)

Role

- 🌐 Organizer for GoToMeeting 25
- 🌐 Organizer for GoToWebinar 1000 with GoToMeeting
- 🌐 Organizer for GoToTraining with GoToMeeting
- 🗣️ Organizer for OpenVoice

Administrator for this Account

- Full access to all account privileges
- Manager for specified group(s) with limited privileges

Privileges: [Add and Delete Users](#), [Manage Seats](#), [Manage Organizer Settings](#), [Add and Delete Groups](#), [Create Reports](#)

Groups: [None Selected](#)

User Details

Send this email:

[Preview](#)

Select a primary language:

Select a group:

4. Select a role for the user(s). You must select at least 1 role for a user before you can add them. You can assign the user an organizer role, account administrator role (with full account privileges or a manager for groups) or both.

If you make the user an administrator, you can also make the user a [group](#) manager who can manage specific group(s) with the following privileges you can enable or disable:

- Add and delete users
- Manage seats
- Manage organizer settings
- Add and delete groups
- Create reports

5. By default, new users receive the default welcome email, but you can also [Create New Templates](#) and save them for future use.
6. Select a primary language for the user. The welcome email will be sent in the language you choose for the user.
7. Using the “Select a group” drop-down menu, you can select a group for the user (optional). If you don’t select a group, the user will belong to no group by default. See [Manage Groups](#) for more information.
8. When you’re done, click **Save**. New users receive a welcome email with a link to set up their account password. They must complete this required step before they can start using GoToMeeting/GoToWebinar/GoToTraining/OpenVoice.

Create a new welcome email template

All newly added users receive the default welcome email by default, but you can customize welcome emails and store them as templates for future use.

1. [Log in](#) to the Admin Center.
2. Select **Add Users** in the left navigation.
3. On the Add Users page, select **Create New Template** from the “Send this email” drop-down menu.
4. In the “Create New Template” box, enter the title and subject of the new welcome email template, and then add custom text.
5. When you’re done, click **Save**.
6. When you return to the Add Users page, you can select your saved template from the “Send this email” drop-down menu. You can click **Preview**, **Edit** or **Delete** next to the template you select from the drop-down menu.

Add Users

Name and Email Address

First Name	Last Name	Email Address
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="Email Address"/>

[Add Multiple Users](#) | [Add Another User](#)

Role

- Organizer for GoToMeeting 25
- Organizer for GoToWebinar 1000 with GoToMeeting
- Organizer for GoToTraining with GoToMeeting
- Organizer for OpenVoice
- Administrator for this Account

User Details

Send this email:
 [Preview](#)

Select a primary language:

Select a group:

Create Template

Title

From: Test Account
Subject:

CITRIX | online
Dear <First Name> <Last Name>,
Welcome! You have been added to the account for Test Account.

Custom Text

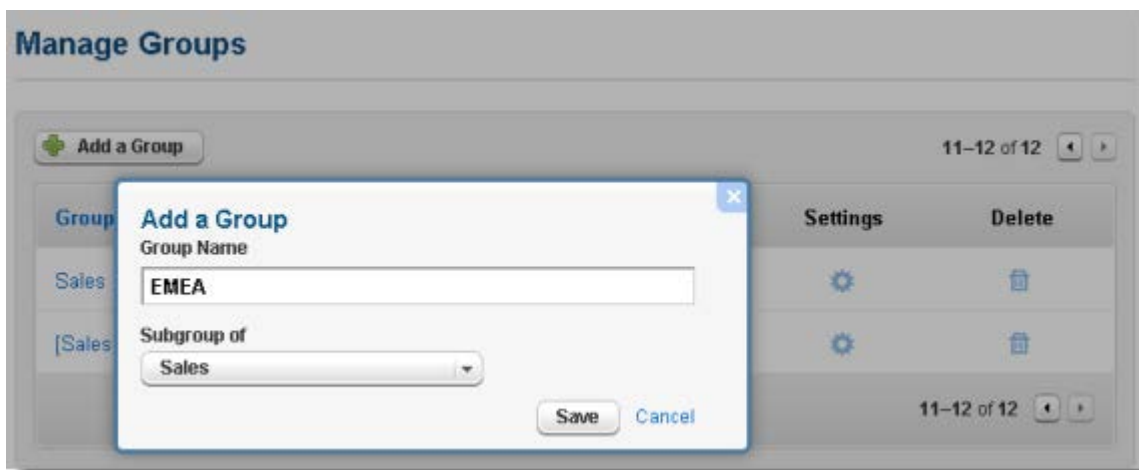
1. To start using your account, [create your account password](#). Your email address (test@example.com) is your username.
? [After you create your account, you will be logged into your account](#)



Manage Groups

Add a group or subgroup

You can add groups and subgroups to your account to group members together and better manage them. Creating groups and subgroups allow you to easily apply the same settings and customizations across all users in the group. You can also [create reports](#) for groups of users.


1. [Log in](#) to the Admin Center.
2. Select **Manage Groups** in the left navigation.
3. On the Manage Groups page, select **Add a Group**.
4. On the “Add a Group” box, enter a Group Name. You can optionally choose a subgroup for the group (by default the parent group is not part of a subgroup). Then click **Save**.



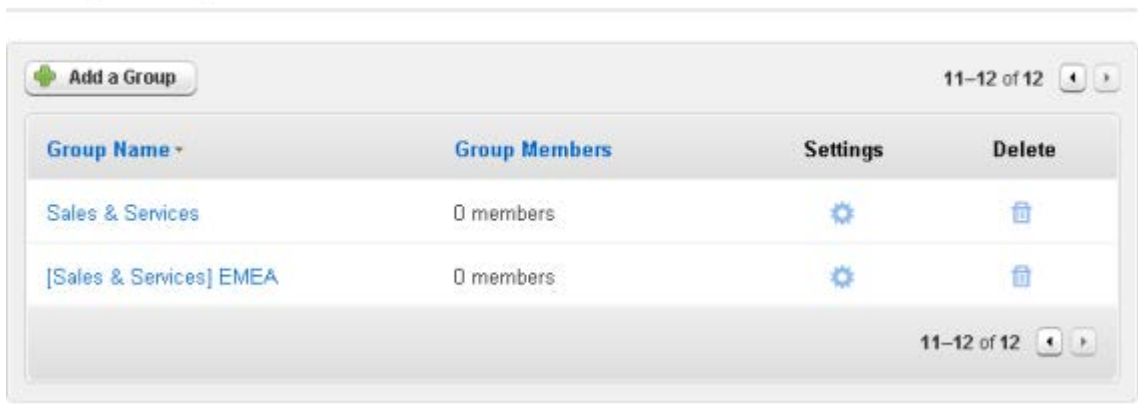
5. When you return to the Manage Groups page, your newly added Group or Subgroup is listed, and the number of members are shown.
 - To edit the Group or Subgroup Name, click the name of the group.
 - To manage the Group or Subgroup settings, click the Settings icon  next to it.
 - To delete the Group or Subgroup, click the Delete icon  next to it. If you delete a parent group, all subgroups in the parent group are also deleted.





Delete a group or subgroup

You can delete groups and subgroups so that members are no longer grouped together. Once you delete a group or subgroup, all of its members will belong to no group by default.

1. [Log in](#) to the Admin Center.
2. Select **Manage Groups** in the left navigation.
3. On the Manage Groups page, select the Delete icon  next to the group you want to delete. Once you delete the group or subgroup, its members are no longer grouped together.

Manage Groups



Group Name	Group Members	Settings	Delete
Sales & Services	0 members		
[Sales & Services] EMEA	0 members		

Manage Users

On the Manage Users page, you can search for users by entering part of their name or email address, or you can filter users by selecting the “Filter by” drop-down menu to sort and view all users, all administrators, group managers, ungrouped users, groups and GoToMeeting/GoToWebinar/GoToTraining/OpenVoice seats on your account. You can also group users, export user details to Excel, delete users and manage seats.

Manage seats

The Product column indicates if a user is enabled with or suspended from GoToMeeting, GoToWebinar, GoToTraining or OpenVoice. Enabled organizers can host sessions, whereas suspended organizers lose the ability to host sessions.

1. [Log in](#) to the Admin Center.
2. Select **Manage Users** in the left navigation.
3. On the Manage Users page, select the check box next to users' names.
4. Select the “Manage Seats” drop-down menu. You can select 1 of the “Change Seat to” options.

The screenshot shows the Citrix Online Admin Center interface. The main content area is titled "Manage Users" and features a table of users. The table has columns for Name, Group, Status, and Product. A search bar and a filter dropdown (set to "All Users") are at the top. A table of users is displayed below, with one user, Max Million, selected. A dropdown menu for "Manage Seats" is open, showing options to change the seat to GoToMeeting 25, GoToWebinar 1000, GoToTraining, OpenVoice, or Remove All Seats (which is selected). The "Apply Changes" button is at the bottom of the dropdown.

Name	Group	Status	Product
<input type="checkbox"/> Jimmy James - Admin		Enabled	GoToMeeting 25, GoToWebinar 1000, GoToTraining, OpenVoice
<input type="checkbox"/> June Jeez	1	Enabled	GoToMeeting 25, GoToWebinar 1000
<input type="checkbox"/> Mario Manman	1	Enabled	GoToMeeting 25, GoToWebinar 1000, GoToTraining, OpenVoice
<input checked="" type="checkbox"/> Max Million	1	Enabled	GoToMeeting 25, GoToWebinar 1000, GoToTraining, OpenVoice
<input type="checkbox"/> May Moore	1	Enabled	GoToMeeting 25
<input type="checkbox"/> Sally Strawberry	1	Suspended	GoToMeeting 25

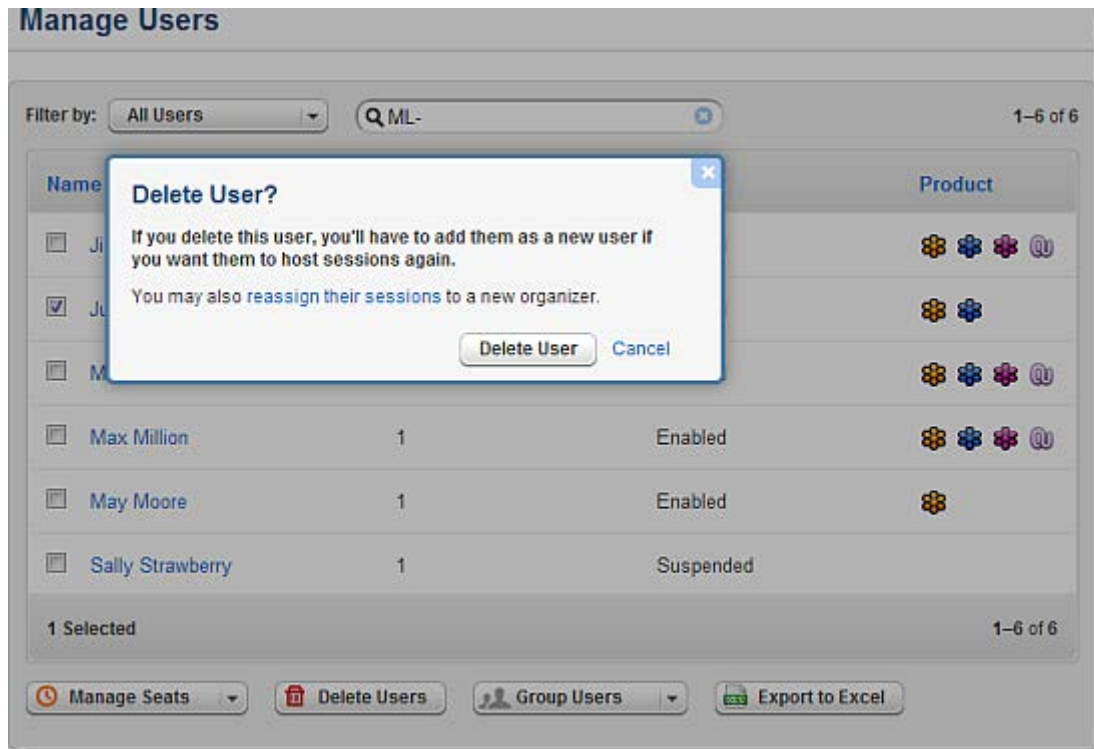
1 Selected

Manage Seats: GoToMeeting 25, GoToWebinar 1000, GoToTraining, OpenVoice, Remove All Seats

Apply Changes

5. After choosing an option, click **Apply Changes**.

- From the Manage Users page, you can resend a welcome email (default or custom) by clicking **Reinvite**.
- If you selected **Remove All Seats**, you will remove all product roles from the user once you click **Apply Changes**. If the user has scheduled sessions, you can click **reassign their sessions** to assign their meetings to another organizer (optional). If you don't reassign the user's scheduled sessions and just remove the seat, the organizer's history is stored for 1 year so if you later decide to re-enable the suspended user, their session history is retained.



Group users

You can group multiple users together in groups to better manage a subset of users on your account. You can also create reports for groups of users to find out more robust information on a subset of users on your account.

1. [Log in](#) to the Admin Center.
2. Select **Manage Users** in the left navigation.
3. On the Manage Users page, select the check box next to users' names.
4. Select the "Group Users" drop-down menu to move users to another group, remove users from a group or add a new group.

Manage Users

Filter by: All Users ML- 1-6 of 6

Name	Group	Status	Product
<input type="checkbox"/> Jimmy James - Admin		Enabled	
<input checked="" type="checkbox"/> June Jeez	1	Enabled	
<input type="checkbox"/> Mario Manman	1	Enabled	
<input type="checkbox"/> Max Million	1	Enabled	
<input type="checkbox"/> May Moore	1	Enabled	
<input type="checkbox"/> Sally Strawberry	1	Suspended	

1 Selected 1-6 of 6

Manage Seats
Delete Users
Group Users
Export to Excel

- Move Users to a New Group
 - ✓ Group Users
 - Research
 - Sales
 - Test 1
- Remove from Group
- Add a Group

If you want to assign a group manager to specific group(s), go to an administrator's User Details page and select the "Manager for specified group(s) with limited privileges" option. You can then enable or disable privileges that the group manager can access.

Manage Users · User Details

User Details for Carrie Cart

User Information

Name: Carrie Cart
Email Address: ml-cart@...
Primary Language: English
Group: Sales & Services

Role

- Organizer for GoToWebinar with GoToMeeting
- Administrator for this Account
 - Full access to all account privileges
 - Manager for specified group(s) with limited privileges

Privileges: [Add and Delete Users](#), [Manage Seats](#), [Manage Organizer Settings](#), [Create Reports](#)

Groups: [Sales & Services](#)

Manage Admin Privileges

- Add and Delete Users
- Manage Seats
- Manage Organizer Settings
- Add and Delete Groups
- Create Reports

Apply Cancel

Manage Users > User Details

User Details for Max Million

User Information

Name: Max Million [Edit](#) Status: Enabled

Email Address: ml-maxmill@... [Edit](#)

Primary Language: English (US) [Change](#)

Group: Sales [Change](#)

Role

- Organizer for this Account
 - Full access to all account privileges
 - Manager for specified group(s) with limited privileges

Privileges: [Add and Delete Users](#), [Manage Seats](#), [Manage Organizer Settings](#), [Add and Delete Groups](#), [Create Reports](#)

Groups: [Documentation](#)

[Change Settings](#)


Select Managed Groups

Search:

- Audio
- Documentation
- RTC Team
- Sales

Groups: Documentation

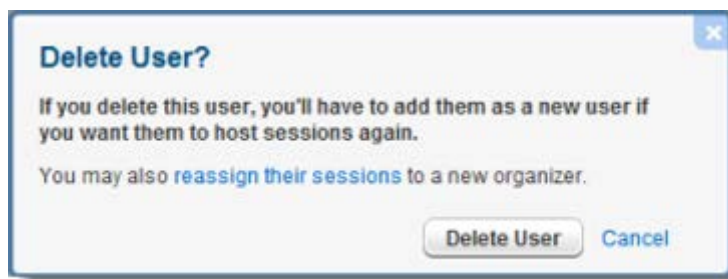
[Apply](#) [Cancel](#)



Delete users

You can delete users from your account on the Manage Users page. If you delete a user, you'll have to send them another invitation if you want them to host sessions again. If a user has scheduled sessions, you can [reassign their sessions](#) to another organizer. Deleting users does not retain their session history – if you want a user's session history to be retained, you can remove their seat and suspend them so that their data is still stored for 1 year in case you later decide to re-enable them.

1. [Log in](#) to the Admin Center.
2. Select **Manage Users** in the left navigation.
3. On the Manage Users page, select the check box next to the users' names. You can only delete up to 10 users at a time on each page.
4. Then select **Delete Users**. If a user has scheduled sessions, you can click **reassign their sessions** to reassign them to another organizer.



5. On the Reassign Meetings page, select the "Reassign to" drop-down menu to choose another organizer. Learn more about [reassigning meetings](#).
6. When you're done, click **Save**. If you want to re-add the user to your account, you will need to add them as a new user.

User details

You can view user information, choose a group and assign organizer and/or account administrator roles for any user on your account.

You can also add additional account administrators and group managers to use the Admin Center. Account administrators have the ability to add new users and manage users on the account just like you. You can assign a user with an account administrator and/or organizer role from the User Details page. A user can be an account administrator without being an active organizer.

Users can have any of the following statuses:

- **Enabled** – Users who have activated their account by creating a password
- **Suspended** – Users who previously had an active seat and/or admin role but had their seat and/or admin role removed
- **Invited** – Users who have been added to the account but have not yet created a password

1. [Log in](#) to the Admin Center.
2. Select **Manage Users** in the left navigation, and click the name of a user.
3. On the User Details page, you can edit the user's name and view the user's email address and usage information (last session, next scheduled session, scheduled recurring session). You can also change their group or role from the User Details page.

4. Click **Save** if you made any changes.





[Manage Users](#) › [User Details](#)

User Details for Max Million

User Information

Name: Max Million Edit	Status: Enabled
Email Address: ml-maxmill@jedix.com	
Primary Language: English (US) - English (US) ▾	
Group: Sales ▾	

Role

-  Organizer for GoToMeeting [Change Settings](#)
-  Organizer for GoToWebinar with GoToMeeting
-  Organizer for GoToTraining with GoToMeeting
-  Organizer for OpenVoice


Administrator for this Account

- Full access to all account privileges
- Manager for specified group(s) with limited privileges

Privileges: [Add and Delete Users](#), [Manage Seats](#), [Manage Organizer Settings](#), [Add and Delete Groups](#), [Create Reports](#)

Groups: [Documentation](#)

Product Usage

 **GoToMeeting**

Last Meeting: No meetings held within the past year

Scheduled Meetings: There are no scheduled meetings.

[Save](#) [Cancel](#)

Reassign Meetings

You can reassign a user's meetings to another active organizer on your account at any time, especially if a user is deleted, suspended or no longer active. Although you can't reassign any webinar or training sessions, a co-organizer can start them.

1. [Log in](#) to the Admin Center.
2. Select **Manage Users** in the left navigation, and click the name of a user.
3. On the User Details page, click **Reassign Meetings**.
4. On the Reassign Meetings page, select the "Reassign to" drop-down menu to choose another organizer. Repeat this step for every meeting you want to reassign to another organizer.
5. When you're done, click **Save**.

[Manage Users](#) > [User Details](#)

User Details for Carrie Cart

User Information

Name: Carrie Cart | [Edit](#) Status: Enabled

Email Address: mi-carrie@jedox.com

Primary Language: English (US) - English (US)

Group: Sales & Services

Role

Organizer for GoToMeeting

Organizer for GoToWebinar with GoToMeeting

Administrator for this Account

[Manage Users](#) > [Reassign Meetings](#)

Product Usage

GoToMeeting
Last Meeting: May 16, 2012
Scheduled Meetings: 1
[Reassign Meetings](#)

[Save](#) [Cancel](#)

Reassign Meetings

Webinar sessions can't be reassigned, but any assigned co-organizer can start these sessions.

Date	Title	Organizer	Reassign to
Sep 20, 2012	Meeting	Carrie Cart	Don't reassign

[Save](#) [Cancel](#)

Create Reports

You can create reports to view data on your organizers and past sessions (data is stored for 1 year from the meeting start date). If an organizer has just ended a session, it may take up to 15 minutes for the session to appear in your reports.

Create Reports

1. Choose a Report Type

Activity Report Shows a summary of each organizer's product usage.

2. Select a Date Range

Within Past 30 Days

From To

3. Select Users or Groups

Filter by: All Users 1-6 of 6

Name -	Group	Status	Product
<input type="checkbox"/> Jimmy James - Admin		Enabled	QU
<input type="checkbox"/> June Jeez	1	Enabled	
<input checked="" type="checkbox"/> Mario Manman	1	Enabled	QU
<input type="checkbox"/> Max Million	1	Enabled	QU
<input type="checkbox"/> May Moore	1	Enabled	
<input type="checkbox"/> Sally Strawberry	1	Suspended	

1 Selected 1-6 of 6

4. Create Report

Excel

HTML

Create

Create a report

1. [Log in](#) to the Admin Center.
2. Select **Create Reports** from the left navigation.
3. On the Create Reports page, choose 1 of the following types of reports:

Account Reports

- **Activity Report** – Shows a summary of each organizer's product usage

The screenshot shows an Excel spreadsheet titled "ActivityReport_08-12-2011.xls [Read-Only] [Compatibility Mode] - Microsoft Excel". The spreadsheet displays an "Activity Report" for the date range "08/13/2010 - 08/13/2011".

Summary Table:

Organizers	Total Meetings	Total Duration (minutes)
	8	12
		53

Details Table:

First Name	Last Name	Email Address	Meetings	Duration (minutes)
kim	chhabria	kc-webcamenabled@jedix.com	3	27
kim_fr	chh_fr	kc-user1_fr@jedix.com	0	0
kim_fr	chh_fr	kc-user11_fr@jedix.com	0	0
kimmy	chhabria	kc-demoreport@jedix.com	7	24
kimmy	chhabria	kc-demoreportuser1@jedix.com	2	2
Kimmy_soademo	Chhabria_soademo	kc-soademo@jedix.com	0	0
r	a	kc-demoreportuser2@jedix.com	0	0
Soa	User	kc-soauser2demo@jedix.com	0	0
			12	53

- **User Status Report** – Shows the current role(s) of each user on your account

User Status Report

August 12, 2011 11:40:50 AM PDT

Summary

Total Active Organizers	Total Users
8	9

Details

First Name	Last Name	Email Address	GoToMeeting	Organize	Active	Since	Administrator
kim	chhabria	kc-webcamenable@jedix.com	Active	-Not collected-	No		
kim_fr	chh_fr	kc-user1_fr@jedix.com	Active	08/10/2011	No		
kim_fr	chh_fr	kc-user11_fr@jedix.com	Active	08/11/2011	No		
Kimmy	Chhabria	kc-100111@jedix.com	Inactive		No		
kimmy	chhabria	kc-demoreport@jedix.com	Active	-Not collected-	Yes		
kimmy	chhabria	kc-demoreportuser1@jedix.com	Active	-Not collected-	No		
Kimmy_soadem	Chhabria_soadem	kc-soadem@jedix.com	Active	08/11/2011	No		
r	a	kc-demoreportuser2@jedix.com	Active	-Not collected-	No		
Soa	User	kc-soauser2demo@jedix.com	Active	08/11/2011	No		

- OpenVoice Integrated Usage Report – Shows details about OpenVoice Integrated usage

Total Participants (Includes Organizers)

Report Date Range: Oct 02, 2013 - Oct 02, 2014

Summary

Total Sessions	Total Participants (Incl)	Total Organizers	Total Audio Minutes	Total Toll-free (OpenVoice Integrated) Minutes
34	47	1	8879	2702

Details

Session Date	Session Start Time	Participant ID	Participant Join Date	Participant Join Time	Cell Type	Duration (minutes)	Rate in USD	Total Cost in USD	Organizer First Name	Organizer Last Name	Organizer Email Address	Product
Jul 08, 2014	12:00 AM PDT	+1206122800	Jul 08, 2014	12:30 AM PDT	United States - Toll-free	58	0.0900	5.2400	Nirav	Singaria	nirav-whatever@acsl.com	GoToMeet

GoToMeeting Reports

- Meeting History Report – Shows details about each organizer’s meetings and attendees

Meeting History Report

Report Date Range: 08/13/2010 - 08/13/2011

Summary

Total Meetings	Total Duration (minutes)
3	63

Details

First Name	Last Name	Email Address	Meeting Date	Meeting Title	Meeting Type	Meeting ID	Attendees (includes organizer)	Start Time	End Time	Duration (minutes)
kim	chhabria	kc-webcamenable@jedix.com	08/05/2011	Meet Now	Meet Now	132-682-117	1	1:11:52 AM PDT	1:15:52 AM PDT	1
kim	chhabria	kc-webcamenable@jedix.com	08/05/2011	Meet Now	Meet Now	132-681-825	1	1:11:54 AM PDT	12:19:54 PM PDT	25
kim	chhabria	kc-webcamenable@jedix.com	08/05/2011	Meet Now	Meet Now	305-387-688	1	1:02:42 PM PDT	02:43:34 PM PDT	1

- **Scheduled Meetings Report** – Shows the scheduled meetings for organizers on your account

First Name	Last Name	Email Address	Meeting Date	Start Time	Meeting Title	Meeting ID
kimmy	chhabria	kc-demoreport@jedix.com	08/12/2011	11:00 AM PDT	New Meeting	142-623-021
kimmy	chhabria	kc-demoreport@jedix.com	08/24/2011	03:00 AM PDT	Scheduled Meeting 1: Demo	142-668-629
kimmy	chhabria	kc-demoreport@jedix.com	08/25/2011	03:00 AM PDT	Scheduled Meeting 2: Retrospective	142-660-533
kimmy	chhabria	kc-demoreport@jedix.com	08/26/2011	03:00 AM PDT	Scheduled Meeting 3: Sprint Planning	142-070-445
kimmy	chhabria	kc-demoreport@jedix.com	09/01/2011	11:00 AM PDT	New Meeting	106-129-695
kimmy	chhabria	kc-demoreportuser1@jedix.com	08/27/2011	03:00 AM PDT	User1 Scheduled meeting Client Meeti	142-067-925
kimmy	chhabria	kc-demoreportuser1@jedix.com	11/01/2011	05:00 PM PDT	cheduled meeting 11111	148-490-701
r	a	kc-demoreportuser2@jedix.com	09/01/2011	03:00 AM PDT	User2 Scheduled Meeting :1 sept	142-093-869

- **Attendee Report** – Shows details about the attendees of your organizers' meetings

Meeting Date	Meeting Title	Meeting ID	Attendee Name	Attendee Email Address	Organizer First Name	Organizer Last Name	Organizer Email
12/04/2011	test meet	108-084-920	Ta Li	ta.li@citrix.com	s	s	am.welling@jedix.com

GoToWebinar Reports

- **Webinar Registrant Report** – Shows details about the registrants and attendees of your organizers' webinars

WebinarRegistrantReport_Mar-06-2013.xlsx - Microsoft Excel

Report Date Range: Feb 04, 2013 - Mar 06, 2013

Summary

Total Organizers	Total Webinars	Total Registrants	Total Attendees	Min. Attendees	Max. Attendees
3	5	45	25	1	

Details

Webinar Date & Time	Webinar Title	Webinar ID	Registrant First Name	Registrant Last Name	Registrant Email Address
3/4/2013	Effective Webinar	118-123-1234	Johnny	Jans	jans@je
3/15/2013	Webinar 1	222-234-234	Cam	Crane	crane@je
3/19/2013	Webinar 2	123-345-234	Leila	Lin	ll@je
4/1/2013	Webinar 3	567-445-343	Kimmy	K	k@je
4/5/2013	Webinars 101	980-454-462	Meg	Moon	mmc@je

- **Webinar Recording Registration Report** – Shows details about the registrants for your organizers' recordings.

RecordingRegistrantsReport_Jul-16-2013 (4).xlsx - Microsoft Excel

Report Date Range: Jul 15, 2012 - Jul 16, 2013

Summary

Total Recordings	Total Organizers	Total Recording Registrants
5	3	10

Registrants

Recording Name	Registrant First Name	Registrant Last Name	Registrant Email Address
Legal Compliance Webinar	Flea	Floss	flea@jedix.com

GoToTraining Reports

- **Scheduled Training Sessions Report** – Shows the scheduled training sessions for organizers on your account

Scheduled Training Sessions Report						GoToTraining
Report Generated	Date Range	Organizer				
11/7/2012 4:24 PM PST	11/7/2012 - 11/9/2012	All				
Date	Time	Title	Training ID	Organizer(s)	# Registered	
11/14/2012	11:00 AM PS	Effective New Training	118-026-700	Maureen AdminOrg	20	
11/26/2012	4:00 PM PST	How to record a training	118-064-624	Maureen AdminOrg	13	
11/29/2012	4:00 PM PST	Using Podio	118-179-452	Maureen AdminOrg	4	
12/5/2012	4:00 PM PST	How to record a training	118-072-166	Maureen AdminOrg	3	
12/12/2012	4:00 PM PST	How to record a training	118-096-828	Maureen AdminOrg	16	
12/19/2012	4:00 PM PST	How to record a training	118-131-132	Maureen AdminOrg	10	
12/26/2012	4:00 PM PST	How to record a training	118-138-412	Maureen AdminOrg	3	

- **Training History and Attendee Report** – Shows details about each organizer's training sessions and their attendees

Training History Report							GoToTraining
Report Generated	Date Range	Organizer					
11/7/12 4:12 PM PST	10/24/2012 - 11/7/2012	All					
Date	Time	Title	Training ID	Organizer(s)	Duration	# Attended	
11/2/2012	3:19 PM PS	Effective New Training	118-026-700	Kerrie	32 mins	10	
11/3/2012	11:00 PM PS	Effective New Training	118-026-700	Maureen AdminOrg	10 mins	20	
11/3/2012	2:00 PM PS	Effective New Training	118-026-700	Kerrie	10 mins	22	
11/4/2012	3:00 PM PS	Effective New Training	118-026-700	Maureen AdminOrg	10 mins	14	
11/7/2012	3:00 PM PS	Effective New Training	118-026-700	Maureen AdminOrg	10 mins	14	
11/7/2012	3:00 PM PS	Effective New Training	118-026-700	Maureen AdminOrg	10 mins	20	
11/7/2012	3:00 PM PS	Effective New Training	118-026-700	Maureen AdminOrg	10 mins	16	
11/7/2012	3:00 PM PS	Podio help	118-026-700	Maureen AdminOrg	10 mins	15	
11/7/2012	3:00 PM PS	Effective New Training	118-026-700	Maureen AdminOrg	10 mins	22	
11/7/2012	3:00 PM PS	Effective New Training	118-026-700	Maureen AdminOrg	10 mins	20	

OpenVoice Reports

- **Billing History Report** – Shows details about OpenVoice usage by call type

OpenVoice Billing History Report				
Report Date Range: Apr 18, 2012 - Apr 18, 2013				
Summary				
Total Minutes To Date		Cost To Date		
871		52.47		
Details				
Country	Call Type	Rate in US\$	Minutes	Cost in USD
Singapore	Toll-free	0.27	1	0.27
United States	Long distance	0.06	864	51.84
United States	Toll-free	0.06	6	0.36

- **Rates and Phone Numbers Report** – Shows billing rates and phone numbers by call type

OpenVoice Rates and Phone Numbers Report			
Country	Call Type	Rate in US\$	Phone Number
Argentina	Toll-free	0.57	0 800 444 4193
Australia	Long distance	0.12	+61 1 1879 4146
Australia	Toll-free	0.14	1 800 454 193
Austria	Long distance	0.12	+43 (0) 2 2879 4146
Austria	Toll-free	0.54	0 800 804193
Bahrain	Toll-free	0.37	800 84 193
Belarus	Toll-free	1.03	

- **Usage Report** – Shows details about OpenVoice usage in your organizers' conferences

4. Choose a date range either within the past year or between specific “From” and “To” dates.

Create Reports

The screenshot shows the 'Create Reports' interface. In the first section, '1. Choose a Report Type', a dropdown menu is set to 'Activity Report' with the description 'Shows a summary of each organizer's product usage.'. The second section, '2. Select a Date Range', has the 'Within' radio button selected. A dropdown menu is open, showing options: 'Past 30 Days' (checked), 'Past 60 Days', 'Past 90 Days', and 'Past Year'. A date input field shows '1/16/2012'.

5. Select users or groups. You can filter the following:

- All users, individual users or multiple users
- All administrators, individual administrators or multiple administrators
- All managers, individual managers or multiple managers
- Ungrouped users
- Groups
- Seats (i.e., GoToMeeting, GoToWebinar, GoToTraining, OpenVoice)

The screenshot shows the '3. Select Users or Groups' interface. A 'Filter by:' dropdown menu is open, showing options: 'All Users', 'All Administrators', 'All Managers', 'Un-grouped Users', 'By Seat', 'GoToMeeting', 'GoToWebinar 100', 'GoToWebinar 500 Trial', and 'GoToTraining 100'. Below the dropdown is a search box and a table of users. The table has columns for 'Name', 'Status', and 'Product'. The first four rows are selected. At the bottom, it says '4 Selected | Deselect All Users'.

Name	Status	Product
<input checked="" type="checkbox"/> Jim	Enabled	GoToMeeting, GoToWebinar
<input checked="" type="checkbox"/> Ma	Enabled	GoToMeeting
<input checked="" type="checkbox"/> M	Enabled	GoToMeeting, GoToWebinar
<input checked="" type="checkbox"/> Se	Invited Reinvite	GoToMeeting, GoToWebinar, GoToTraining

6. Then click **Excel** or **HTML** to view information on your account and users.





Manage Admin Settings

From the Admin Settings page you can edit your account name and change the [default product settings](#). You can also edit specific GoToMeeting and GoToTraining features.

Account Name

Odd [Edit](#)

Default Product Settings

 GoToMeeting [Edit](#)
 GoToWebinar
 GoToTraining
 OpenVoice

GoToMeeting

Logo [Upload](#)

Choose a .gif or .jpg file up to 400 x 200 pixels and 100KB in size.
Attendees will see this logo when screen sharing is stopped.

Co-organizers [Edit](#)

Co-organizers are enabled. Organizers can select other co-organizers within the account to start and share meetings.

Unidentified Callers [Edit](#)

Unidentified Caller Display is enabled. Organizers will be able view unidentified caller's information.

GoToTraining

Branding [Edit](#)

Logos and custom colors will appear on catalogs, materials, and registration pages.









Payment [Edit](#)

Manage payment settings for training sessions.

Content Sharing [Edit](#)

Content Sharing is disabled. Organizers won't share storage space and they can't select other co-organizers within the account to manage training sessions.

Custom Field [Add a Custom Field](#)

27	
35	
11	
61	
39	
43	
33	
28	

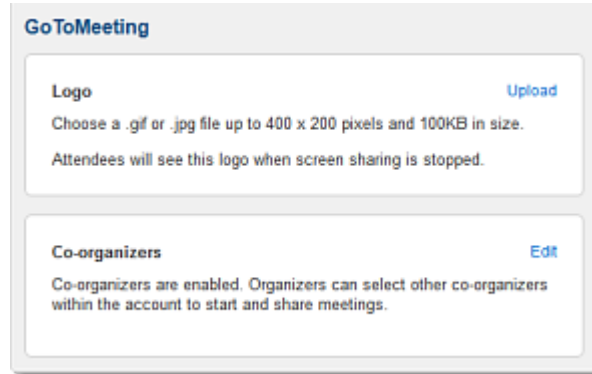
Edit GoToMeeting Settings

Upload or Remove a Logo

You can upload a .gif or .jpg file (up to 400 x 200 pixels and 100 KB) by clicking **Upload** and selecting the image you would like as your logo. Attendees will see your logo when screen sharing is stopped.

Enable or Disable Co-organizers

Co-organizers are enabled by default, but you can edit this setting by clicking **Edit** next to Co-organizers. When co-organizers are enabled, organizers can select other co-organizers within the account to start and share their meetings.



Edit GoToTraining Settings

Edit Branding Settings

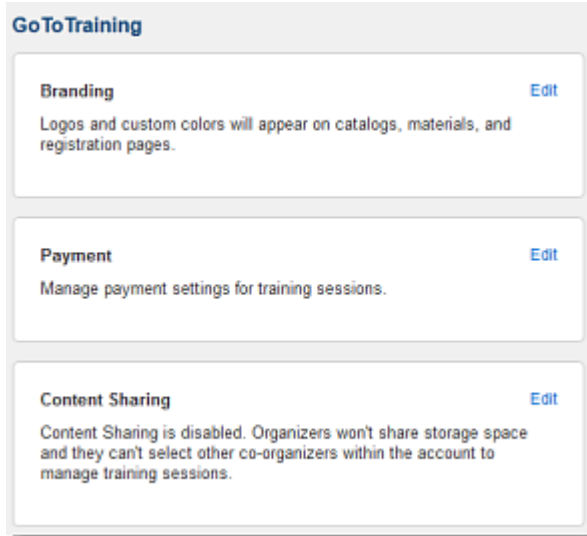
You can edit branding settings such as logos and custom colors for catalogs, materials and registration pages by clicking **Edit** next to Branding.

Edit Payment Settings

Manage your payment settings for your trainings and organizers' trainings by clicking **Edit** next to Payment.

Enable or Disable Content Sharing

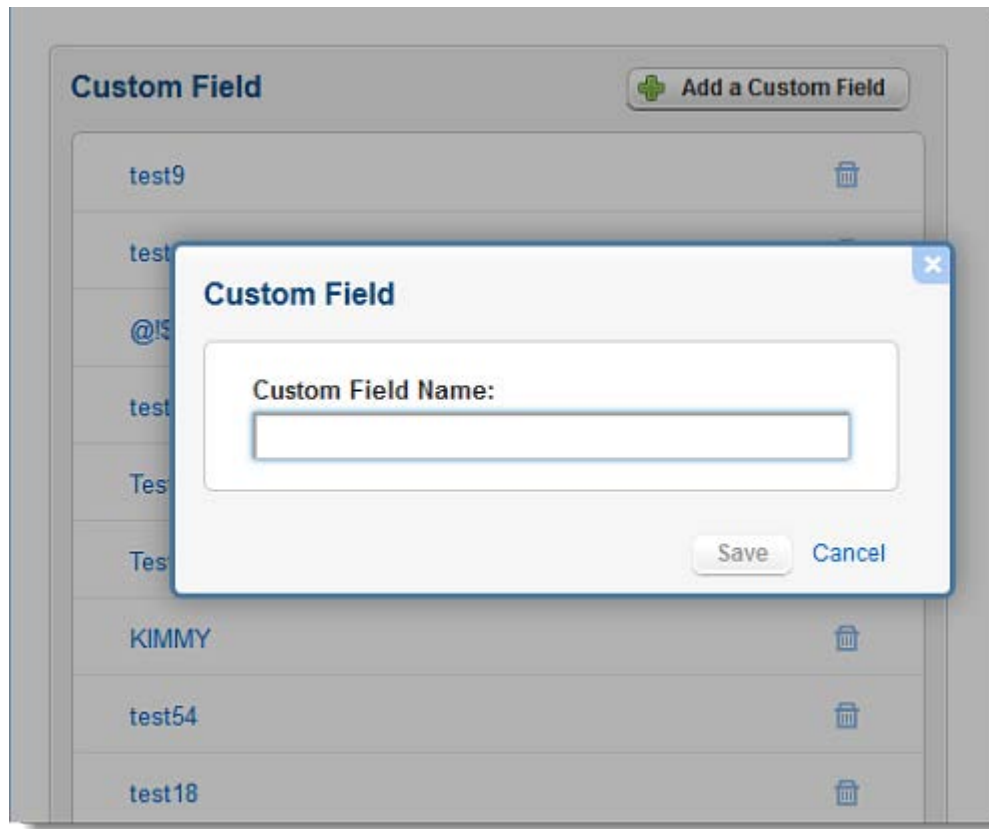
You can choose to allow organizers to share content by enabling content sharing. When content sharing is enabled, organizers will share storage space and they can select other co-organizers within the account to manage training sessions. When content sharing is disabled, organizers won't share storage space and they can't select other co-organizers within the account to manage training sessions. To turn it off or on, click **Edit** next to Content Sharing.



Create Custom Fields

As an admin, you can define custom fields (e.g. attributes) that will appear on the User Details page for each user on your account.

1. Click **Admin Settings** in the left navigation.
2. Click the **Add Custom Field** button.
3. Enter a custom field, you can include numeric and alpha characters.



4. Click **Save**. When you view the User Details page for a user on your account, you will see this new field. The field will also be included in search results in searches made from the Manage Users page (all users with this defined attribute will appear in search results).

User Settings

Account administrators can create custom settings for users, which override the default settings for new users. You can change product settings for all users, all administrators, all group managers, groups and ungrouped users, as well as by seats, on your account. You can customize various settings for users and groups, and you can also manage the default settings for new users on your account.

Apply custom settings for users and groups

1. [Log in](#) to the Admin Center.
2. Select **User Settings** from the left navigation.
3. On the User Settings page, use the "Filter by" drop-down menu to choose all users, a group of users or an individual user to manage settings. Or, you can enter part of a user's name or email address into the search field.
4. Existing settings for users are displayed in your filtered results. You can use the "Show Features" drop-down menu to display up to 4 settings/features at once.
5. Change the setting for selected users or groups by selecting a setting or feature and then choosing 1 of the following options when prompted:

- **On** - organizer can change this feature
- **Off** - organizer can change this feature (only available for Audio Settings)
- **Disabled** - organizer cannot use this feature

GoToMeeting Settings	GoToWebinar Settings	GoToTraining Settings	OpenVoice Settings
VoIP	VoIP	VoIP	Long distance
Long distance	Long distance	Long distance	Toll-free
Provide own audio	Provide own audio	Provide own audio	Enter muted
Display attendee list	Chat and Q & A	Webcams	Conference continues
Grant mouse control	Webcams		Recording
Chat			Security code
Recording			Client charge code
Webcams			Prompt participants for names
			Announce arrival
			Announce departure
			Email attendee report
			Email recording link

Note: Admins can also assign the GoToMeeting 25 plan and [GoToMeeting Essentials](#) to organizers on their account.

6. When you're done, click **Save**. Custom settings override the default settings.

Manage Settings

The screenshot displays the 'Manage Settings' interface with the following components:

- Navigation Tabs:** GoToMeeting, GoToWebinar, GoToTraining, OpenVoice.
- Section 1: Select Users or Groups**
 - Filter by: All Admini... (dropdown), Search: Q jim
 - Table with columns: Name, VoIP, Long distance, Provide o audio
 - Row: Jim Jones - Admin, VoIP: , Long distance: , Provide o audio:
 - 1 Selected
 - Show Feature... dropdown menu:
 - Select 4 items
 - VoIP
 - Long distance
 - Provide own audio
 - Display attendee list
 - Grant mouse control
 - Chat
 - Recording
 - Webcams
- Section 2: Change Settings**
 - Tabs: Audio, Details, Recent Changes
 - Audio: VoIP - requires microphone and speakers
 - Long distance numbers: Countries
 - Provide their own conference call service in meetings
 - Features:
 - Record Meetings
 - Grant keyboard and
 - Display the Attendee List during meetings
 - Let participants chat during meetings
 - Let participants share webcams during meetings
 - Recent Changes:
 - Updated for 1 user.

A modal dialog box is open over the 'Let participants share webcams during meetings' feature, titled 'Let participants share webcams during meetings'. It contains two radio buttons: 'On - organizer can change this feature' (unselected) and 'Disabled - organizer cannot use this feature' (selected). 'Save' and 'Cancel' buttons are at the bottom.

Remove Toll and Toll-Free PSTN Dial-In Countries

1. Click **User Settings** in the left navigation
2. Go to the Change Settings section and select **Countries** in the Details column.
3. In the pop-up, select or deselect countries you would like to be available to organizers.

Odd: User Settings

GoToMeeting GoToWebinar GoToTraining OpenVoice

1. Select Users or Groups

Filter by: All Users Search for a name, email or conference Show Features

Name	VoIP	Long distance	Toll-free	Provide own audio
<input checked="" type="checkbox"/> Alex t - Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Alex2 Test - Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Aman Singh	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5827				

Include Toll-free Numbers for

Search for a country

- All Countries
- Argentina
- Australia
- Austria
- Bahrain
- Belarus
- Belgium
- Brazil

Available countries: None Selected
Default countries: None Selected
Preferred number: None Selected

Save Cancel

1-10 of 5827

2. Ch

Aud

VoIP

Long

Recent Changes

Manage default settings for new users

1. [Log in](#) to the Admin Center.
2. Select **Admin Settings** from the left navigation.
3. On the Admin Settings page, select **Edit** in the Default Product Settings section. These settings set the default for all new users added to your account in the future.

The screenshot displays the 'Test Account: Admin Settings' interface. It features several sections:

- Account Name:** A text field containing 'Test Account' with an 'Edit' link to its right.
- Default Product Settings:** A list of products with their respective icons: GoToMeeting (yellow gear), GoToWebinar (blue gear), GoToTraining (purple gear), and OpenVoice (purple microphone). A red arrow points to the 'Edit' link on the right side of this section.
- GoToMeeting:** A section for configuring the GoToMeeting logo. It shows a 'Logo' field with the 'CITRIX online' logo and a 'Remove' link. Below the logo, it states: 'Attendees will see this logo when screen sharing is stopped.'
- Co-organizers:** A section with the heading 'Co-organizers' and an 'Edit' link. The text below reads: 'Co-organizers are enabled. Organizers can select other co-organizers within the account to start and share meetings.'
- GoToTraining:** A section containing three sub-sections:
 - Branding:** Includes the heading 'Branding' and an 'Edit' link. The text states: 'Logos and custom colors will appear on catalogs, materials, and registration pages.'
 - Payment:** Includes the heading 'Payment' and an 'Edit' link. The text states: 'Manage payment settings for training sessions.'
 - Content Sharing:** Includes the heading 'Content Sharing' and an 'Edit' link. The text states: 'Content Sharing is disabled. Organizers won't share storage space and they can't select other co-organizers within the account to manage training sessions.'

4. All settings are enabled by default. On the Default Product Settings page, you can change the default settings for new users by selecting a setting and choosing 1 of the following options when prompted:

- **On** - organizer can change this feature
- **Off** - organizer can change this feature (only available for Audio Settings)
- **Disabled** - organizer cannot use this feature

GoToMeeting Settings	GoToWebinar Settings	GoToTraining Settings	OpenVoice Settings
VoIP - requires microphone and speakers	VoIP - requires microphone and speakers	VoIP - requires microphone and speakers	Long distance numbers
Long distance Preferred number numbers	Long distance numbers Provide their own conference call service in webinars	Long distance numbers Provide their own conference call service in trainings	Toll-free numbers Participants enter conference muted
Provide their own conference call service in meetings	Allow chat and Q & A in webinars	Let webinar staff members share webcams with 100 participants during webinars	Conference can continue after organizer leaves
Recording meetings	Let webinar staff members share webcams with 100 participants during webinars		Record conference
Grant keyboard and mouse control to attendees			Security code for each conference
Display the attendee list during meetings			Client charge code
Let participants chat during meetings			Manage participants who call in early
Let participants share webcams during meetings			Attendee limit
			Prompt participants for names when joining
			Announce arrival of each participant
			Announce departure of each participant
			Automatically send attendee report to organizer
			Automatically send recording link to organizer

5. When you're done, click **Save**. If a user has multiple products, you must make the change for each product using the GoToMeeting tab, GoToWebinar tab GoToTraining tab or OpenVoice tab.

Admin Settings > Default Product Settings

Default Product Settings

GoToMeeting GoToWebinar GoToTraining OpenVoice

Audio	Status	Details
VoIP - requires microphone and speakers	On	
Long distance numbers	On	France, Spain
Preferred number		None Selected
Provide their own conference call service in meetings	Off	

Features	Status
Record Meetings	Disabled
Grant keyboard and mouse control to attendees	On
Display the Attendee List during meetings	
Let participants chat during meetings	
Let participants share webcams during meetings	

Let participants share webcams during meetings

On - organizer can change this feature
 Disabled - organizer cannot use this feature

Save Cancel

Enable OpenVoice Integrated Toll-Free Audio

You can enable OpenVoice Integrated Toll-Free audio service for individual users, all users, all administrators, groups and ungrouped users on your account. Once you enable toll-free audio, users can schedule sessions with [international toll-free numbers](#).

Enable toll-free numbers for existing users

1. [Log in](#) to the Admin Center.
2. Select **User Settings** from the left navigation.
3. On the User Settings page, use the "Filter by" drop-down menu to choose all users, a group of users or an individual user to manage settings. Or, you can enter part of a user's name or email address into the search field.
4. Existing settings for users are displayed in your filtered results. Select **Toll-free numbers > On - organizer can change this feature > Save**.

User Settings

GoToMeeting GoToWebinar GoToTraining OpenVoice

1. Select Users or Groups

Filter by: All Users Q andrew Show Features

Name	VoIP	Long distance	Toll-free	Provide own audio
<input checked="" type="checkbox"/> Andrew Harris	x	✓	✓	<input type="checkbox"/>

1 Selected 1-1 of 1

2. Change Settings

Audio	Details	Recent Changes
VoIP - requires microphone and speakers		
Long distance numbers	Countries	
Toll-free numbers	Countries	✓ Updated for 1 user.
Provide their own conference call s		

Features

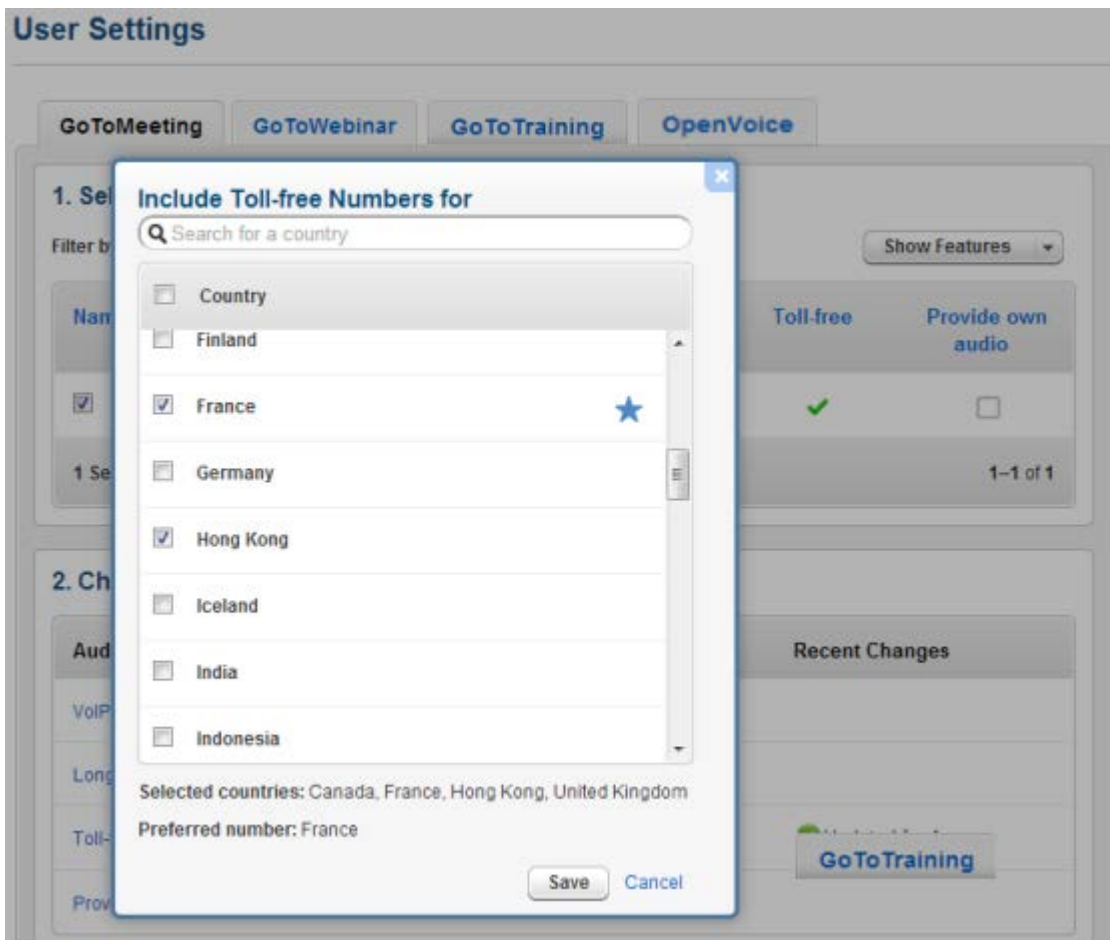
- Record Meetings
- Grant keyboard and mouse control
- Display the Attendee List during me
- Let participants chat during meetings
- Let participants share webcams during meetings


Toll-free numbers

- On - organizer can change this feature
- Off - organizer can change this feature
- Disabled - organizer cannot use this feature

Save Cancel

5. Then select the **Countries** to choose which countries to provide toll-free numbers for, and click **Save**. Custom settings override the default settings.



For GoToMeeting toll-free numbers, you can also select the Star icon  next to a country to make it the preferred number. Participants will see the preferred number listed first.

Enable toll-free numbers by default for new users

1. [Log in](#) to the Admin Center.
2. Select **Admin Settings** from the left navigation.
3. On the Admin Settings page, select **Edit** in the Default Product Settings section. These settings set the default for all new users added to your account in the future.
4. Select **Toll-free numbers > On - organizer can change this feature > Save**.
5. Then select the **Countries** to choose which countries to provide toll-free numbers for, and click **Save**. The default settings for new users will include toll-free numbers.

For GoToMeeting long distance and toll-free numbers, you can select the Star icon ☆ next to a country to make it the preferred number. You can select 1 preferred long distance and/or 1 preferred toll-free number. If both a long distance and a toll-free number are enabled for a meeting, the toll-free number will be the preferred number that participants see listed first.

[Admin Settings](#) > [Default Product Settings](#)

Default Product Settings

GoToMeeting			
GoToWebinar			
GoToTraining			
OpenVoice			
Audio	Status	Details	
VoIP - requires microphone and speakers	On		
Long distance numbers	On	United States	
Toll-free numbers	On	Canada and 3 other countries	
Preferred number		New Zealand	
Provide their own conference call service in meetings	Off		

Conference Management

Administrators can provide organizers with privileges to manage their conference. Organizers in return can extend these privileges to their participants. You can choose 1 of the following options per feature setting.

Search for Conference Room Numbers

As an administrator, you have the ability to search for conference room numbers that organizers are using.

1. Go to the **Manage Users** page.
2. Type the conference room number (or part of the conference room number) that you are searching for and hit **Enter** on the keyboard.

The screenshot shows the 'Manage Users' interface. On the left, there is a sidebar with navigation options: 'Manage Users', 'Add Users', 'User Settings', 'Manage Groups', 'Create Reports', and 'Admin Settings'. Below these is a section for 'Organizer Seats' with statistics for GoToMeeting 25, GoToWebinar 1000, GoToTraining, and OpenVoice. The main content area is titled 'Even: Manage Users' and features a search bar with '216' entered. Below the search bar is a table of users with columns for Name, Group, Status, and Product. The table lists several users, including 'Kim1.3 Chh1.3', 'Riya Ahtani - Manager', and multiple 'SOA User - Admin' entries. At the bottom, there are buttons for 'Manage Seats', 'Delete Users', 'Group Users', and 'Export to Excel'.

Name	Group	Status	Product
<input type="checkbox"/> Kim1.3 Chh1.3	smoketest-1386617976...	Invited Reinvite	
<input type="checkbox"/> Riya Ahtani - Manager	smoketest-1383601428...	Invited Reinvite	
<input type="checkbox"/> SOA User - Admin	1	Enabled	
<input type="checkbox"/> SOA User - Admin	1	Enabled	
<input type="checkbox"/> SOA User - Admin	1	Enabled	
<input type="checkbox"/> SOA User - Admin	1	Enabled	
<input type="checkbox"/> SOA User - Admin	1	Enabled	
<input type="checkbox"/> SOA User - Admin	1	Enabled	
<input type="checkbox"/> SOA User - Admin	1	Enabled	
<input type="checkbox"/> SOA User - Admin	1	Enabled	
<input type="checkbox"/> SOA User - Admin	1	Enabled	
<input type="checkbox"/> SOA User - Admin	1	Enabled	

3. A list of any users with that conference room number (or part of that number in the full conference room number) on their account. You can click the user and view their Conference Room number under the Product Usage section.

Manage Users

- Add Users
- User Settings
- Manage Groups
- Create Reports
- Admin Settings

Organizer Seats

- GoToMeeting 25: 13 of 50000 in use
- GoToWebinar 1000: 36 of 50000 in use
- GoToTraining: 5754 of 50000 in use
- OpenVoice: 5700 in use

Need more seats? [Contact us.](#)

Even: User Details for Kim1.3 Chh1.3

User Information

Name: Kim1.3 Chh1.3 | [Edit](#) Status: Invited on Dec 9, 2013 | [Reinvite](#)

Email Address: tc-user213200817974000@citrix.com

Primary Language: English (US) - English (US) ▼

Group: No Group ▼

Role

- Organizer for GoToMeeting 25 [Change Settings](#)
- Organizer for GoToWebinar 1000 with GoToMeeting
- Organizer for GoToTraining with GoToMeeting
- Organizer for OpenVoice
- Administrator for this Account

Product Usage

OpenVoice

Conference Room Number: 849-801-216 [Resend Welcome Email](#)

Organizer PIN: 9597742

[Save](#) [Cancel](#)

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View Conference Room PINs

As an administrator, you have the ability to view organizer's PINs by doing 1 of the following

1. Click **Manage Users** in the left navigation
2. Select the organizer whose PIN you would like to view.
3. View the organizer PIN in the Product Usage section.

Product Usage

GoToMeeting
 Last Meeting: Apr 23, 2013
 Scheduled Meetings: 8
[Reassign Meetings](#)

OpenVoice
 Conference Room Number: 472-771-446 | [Resend Welcome Email](#)
 Organizer PIN: 6591155

-or-

1. Click **Create Reports** in the left navigation.
2. Select **Conference Room Report** in the drop-down menu.
3. Click **Create**. You will see a column in the report listing organizers' PINs.

Conference Room Report			
February 28, 2014 01:36 AM SGT			
OpenVoice and OpenVoice Integrated audio service is provided by Citrix Online Audio, LLC.			
Summary			
Total Active Organizers		5708	
Details			
Conference Room Number	Organizer Pin	First Name	Last Name
460869487	4105154	#firstName#	#lastName#
430775710	8025182	#firstName#	#lastName#
593298569	1185052	#firstName#	#lastName#
679839832	1234	#firstName#	#lastName#
490067134	9586637	7739321	cccc
405870601	3847788	Alex	test
156521013	9757332	Alex2	Test
445962017	555555555555	big	admin
133687922	3341828	ee	ee
699124898	2945201	elliott	barlas
118660292	3673551	elliott	test
383027607	4687988	foo	fleep