# **GoTo**Meeting<sup>®</sup>

Administrator Guide

GoToMeeting GoToWebinar GoToTraining OpenVoice

# **CITRIX**

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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.

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	OpenVoice			
	Remove All Seats			

## 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 semicolor, or press **Enter/Return** on your keyboard.

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First Name	Last Name	Email Address
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Administrator f	or this Account	
Full access	s to all account privil	eges
Manager for	or specified group(s)	with limited privileges
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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 <u>group</u> 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 <u>Create New Templates</u> 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 <u>Manage Groups</u> 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 Add	ress	
First Name Last	Name	Email Address
First Name Las	t Name	Email Address
Add Multiple Users   Add A	nolher User	
Role		
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Crganizer for GoTo		S
Crganizer for GoTol		Create Template
Administrator for this Act	count	Tide Name This Template
Iser Details		From: Test Account
Send this email:		Subject: Enter a Subject for This Template
Create New Template.		Preview CITRIX. online
Select a primary langua	ge:	Dear <first name=""> <last name="">, Welcome! You have been added to the account for Test Account.</last></first>
English (International)	- English (Inte	mationa Custom Text
Select a group:		Your custom text will be included in this welcome email template.
No Group		
Save Cancel		
		To start using your account, create your account password. Your email address (test@example.com) is your username.     After user reacts user recount user will be bronad into user account     Save Cancel

## 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. <u>Log in</u> 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**.

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Group	Add a Group Group Name	Settings	Delete	
Sales	EMEA	0	団	
[Sales	Subgroup of Sales	0	Ð	
	Save Cancel	11	I-12 of 12 💽	

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 <sup>SP</sup> next to it.
- To delete the Group or Subgroup, click the Delete icon in 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 a next to the group you want to delete. Once you delete the group or subgroup, its members are no longer grouped together.

#### Manage Groups

Add a Group	11-12 of 12		11-12 of 12 💽
Group Name -	Group Members	Settings	Delete
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		11	-12 of 12 💽

## 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.

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Users				
r Settings nage Groups	Filter by: All Users	( <b>Q</b> ml-	0	1-6 of (
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ganizer Seats	June Jeez	1	Enabled	\$
Tolleeting 25: 2 of 50000 in use	Mario Manman	1	Enabled	<b>\$\$ \$\$ \$</b> \$ ()
ToWebinar 1000: 5465 of 50000 in use	Max Million	1	Enabled	<b>\$ \$ \$ \$</b> ()
ToTraining: 5454 of 50000 in use	May Moore	1	Enabled	\$
5467 in use	Sally Strawberry	1	Suspended	
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fio, LLC.	GoToWebinar 1000			
	GoToTraining			
	OpenVoice			

- 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.

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Nar	Delete User?		×	Product
	Ji If you delete this user you want them to hos	r, you'll have to add them as It sessions again.	a new user if	<b>\$\$ \$\$ \$</b> ()
V	Ju You may also reassig	n their sessions to a new org	janizer.	88
	M	Delete	User Cancel	<b>\$\$ \$\$ \$</b> \$ ())
	Max Million	1	Enabled	<b>\$\$ \$\$ \$</b> ()
	May Moore	1	Enabled	8
	Sally Strawberry	1	Suspended	
1 Se	elected			1–6 of 6

### 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.

Mai	nage Users			
Filter	by: All Users	Q ML-	0	1-6 of 6
Na	me -	Group	Status	Product
	Jimmy James - Adr	nin	Enabled	<b>\$ \$ \$</b> \$ @
V	June Jeez	1	Enabled	<b>\$</b> \$
	Mario Manman	1	Enabled	<b>\$ \$ \$</b> \$ @
	Max Million	1	Enabled	<b>\$ \$ \$</b> \$ @
	May Moore	1	Enabled	\$
	Sally Strawberry	1	Suspended	
1 5	elected			1-6 of 6
0	Manage Seats 🔍 👻		Group Users     Group Users     Group Users     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.

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ie I	Add and Delete Users	abled
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iminis	strator for this Account	
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ml-maxmill     Select Managed Groups       Primary La     Q       English (     Audio       Group:     Sales       Sales     Documentation       Role     RTC Team	
English ()     Audio       Group:     Sales       Sales     Documentation       Role     RTC Team	
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Apply Gancel	_

### **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 <u>reassign their sessions</u> 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.

Delete User?	×
If you delete this user, you'll ha you want them to host session	ive to add them as a new user if is again.
You may also reassign their set	ssions to a new organizer.
	Delete User Cancel

5. On the Reassign Meetings page, select the "Reassign to" drop-down menu to choose another organizer. Learn more about <u>reassigning meetings</u>.

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

ser Details for Max Million	
Jser Information	
Name: Max Million   Edit Email Address: ml-maxmill@jedix.com	Status: Enabled
Primary Language: English (US) - English (US)	
Role	
<ul> <li>Image: Second system of the second sys</li></ul>	Change Settings
<ul> <li>Administrator for this Account</li> <li>Full access to all account privileges</li> <li>Manager for specified group(s) with limited privileges: Add and Delete Users, Manage Seats, Reports</li> <li>Groups: Documentation</li> </ul>	ges Manage Organizer Settings, Add and Delete Groups, Create
Product Usage	
GoToMeeting Last Meeting: No meetings held within the past year Scheduled Meetings: There are no scheduled meeti	
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**.

lanage Users I User Details				
Jser Details for Carrie	Cart			
User Information				
Name: Carrie Cart   Edit Email Address: ml-carrie@jedix.com Primary Language: English (US) - English (US) - Group: Sales & Services +		Status: Enabled		
Role				
Grganizer for GoToWebina     Administrator for this Account	Manage Users + Rea		L	
Product Usage		sessions can't be reassig	ned, but any assigned co-org	ganizer can start these
GoToMeeting Last Meeting: May 16, 2012 Scheduled Meetings: 1 Reassign Meetings	Date	Title	Organizer	Reassign to
Save Cancel	Sep 20, 2012	Meeting	Carrie Cart	Don't reassign +

## **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 15/06/2013 To 15/07/2013 m m 3. Select Users or Groups Filter by: All Users 8 -(Q.ml-1-6 of 6 Name -Group Status Product 😫 🏶 🏶 Jimmy James - Admin Enabled 0 June Jeez 1 Enabled 😫 🏶 Mario Manman Enabled 1 \$ \$ \$ 0 Max Million 1 Enabled 😫 🏶 🏶 0 May Moore 1 Enabled 88 Sally Strawberry 1 Suspended 1-6 of 6 1 Selected 4. Create Report Excel O 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

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	Al + 🤄 🎜 Activity	Report				
4	A	В	C	D	E	F
1	Activity Report					GoToMeeting
2	Report Date Range: 08/13/2010 - 08/13/2011					
3						
1	Summary					
5	Organizers	Total Meetings	Total Duration (minutes)			
6	8	12	2	53		
7						
8	Details					
9	First Name	Last Name	Email Address	Meetings	Duration (minutes)	
0	kim	chhabria	kc-webcamenabled@jedix.co	im 3	27	
1	kim_fr	chh_fr	kc-user1_fr@jedix.com	0	0	
2	kim_fr	chh_fr	kc-user11_fr@jedix.com	0	0	
3	kimmy	chhabria	kc-demoreport@jedix.com	7	24	
14	kimmy	chhabria Chhabria	kc-demoreportuser1@jedix.c	om 2 0	2	
16		Chnabha_soademo	o kc-soademo@jedix.com kc-demoreportuser2@jedix.c		0	
17	Soa	a User	kc-soauser2demo@jedix.cor		0	
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• User Status Report - Shows the current role(s) of each user on your account

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	A	B	C	D	E	F	G	1
	User Status Report						GoToMeeti	ina
2	August 12, 2011 11:40:50 AM PD						ooromood	ng
3	August 12, 2011 11,40.00 AM P.D							
4	Summary							
5	Total Active Organizers	Total Users						-
6	8	9						
7								
8								
9	Details							
10	First Name	Last Name	Email Address	GoToMeeting Organize	e Active Since	Administrator	r	
11	kim	chhabria		Active	-Not collected	No		
12	kim fr	chh fr	kc-user1 fr@jedix.com	Active	08/10/2011	No		_
13	kim fr	chh_fr	kc-user11_fr@jedix.com	Active	08/11/2011	No		
14	Kimmy	Chhabria	kc-100111@jedix.com	Inactive		No		
15	kimmy	chhabria	kc-demoreport@jedix.com	Active	-Not collected-	Yes		
	kimmy	chhabria	kc-demoreportuser1@jedix.com	Active	-Not collected-			
17	Kimmy_soademo	Chhabria_soademo	kc-soademo@jedix.com	Active	08/11/2011	No		
18		а	kc-demoreportuser2@jedix.com	Active	-Not collected-			1
	Soa	User	kc-soauser2demo@jedix.com	Active	08/11/2011	No		
20		A706		The set		1.0	12	-
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• OpenVoice Integrated Usage Report – Shows details about OpenVoice Integrated usage

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Details													
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1 Jul 08: 2014 1	2:00 AM PDT	417137726841	Jul 09. 2014	12:50 AM POT		United States - Toll-Irea	5	0.0500	3.5400	New	Sningala	ninev-whatever@jecis.com	GaToMeet
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#### **GoToMeeting Reports**

• Meeting History Report – Shows details about each organizer's meetings and attendees

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8 Upcoming Meeting Details							
9 First Name	Last Name	Email Address	Meeting Date	Start Time	Meeting Title	Meeting ID	
10 kimmy	chhabria	kc-demoreport@jedix.com	06/12/2011		New Meeting	106-423-021	
11 kammy	chhabria	kc-demoreport@jedix.com	08/24/2011		EScheduled Meeting 1: Dema	142-468-629	
2 kimmy	chhabria	kc-demoreport@jedix.com	08/25/2011		Scheduled Meeting 2 Retrospective	142-060-533	
3 kimmy	chhabria	kc-demoreport@jedix.com	08/26/2011		Scheduled Meeting 3: Sprint Planning		
4 kimmy	chhabria	kc-demoreport@jedix.com	09/01/2011		TNew Meeting	106-129-685	
15 kimmy	chhabria	kc-demoreportuser1@jedix.com			User1 Scheduled meeting Client Mee		
16 kieruny	chhatria	kc-demoreportuser1@jedix.cor			Eacheduled meeting 11111	148-490-701	
17 r. 18	8	kc-demoreportuser2@jedix.cor	n 09/01/2011	03:00 AM PD1	TUser2 Scheduled Meeting 1 sept	142-093-869	
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0 First Name	Last Name	Email Address	Meeting Date	Start Time	Meeting Title	Meeting ID	
21 kimmy	chhabria	kc-demoreport@jedix.com		-Recurring-	Recurring Meeting1:Standup	142-073-709	
2 kammy	chihabria	kc-demoreport@jedix.com	-Recurring-	-Recarring-	Recurring Meeting2 Grooming	142-084-901	
13 kimmy	chitabria	kc-demoreportuser1@jedis.com		-Recurring-	User1 Recurring Meeting Chent sync	up 142-090-493	
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• Scheduled Meetings Report - Shows the scheduled meetings for organizers on your account

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

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#### **GoToWebinar Reports**

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

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

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#### **GoToTraining Reports**

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

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6	11/14/2012	11:00 AM PS	Effective New Training	118-02	6-700	Maureen AdminOr	g 20			
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8	11/29/2012	4:00 PM PST	Using Podio	118-17	9-452	Maureen AdminOr	9.4			
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12	12/26/2012	4:00 PM PST	How to record a trainin	118-13	8-412	Maureen AdminOr	g 3			
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• Training History and Attendee Report – Shows details about each organizer's training sessions and their attendees

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#### **OpenVoice Reports**

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

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4	Summary				
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8	Details				
9	Country	Call Type	Rate in USI	Minutes	Cost in USD
10	Singapore	Toll-free	0.27	1	0.27
11	United States	Long distance	0.06	864	51.84
12	United States	Toll-free	0.06	6	0.36
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• Rates and Phone Numbers Report - Shows billing rates and phone numbers by call type

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6	Australia		To	oll-free	0.14	1 800 454 193
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• Usage Report – Shows details about OpenVoice usage in your organizers' conferences

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10	Apr 11, 2013	c239fe3a-22ee-4026-8704-a32402ae24e8	pkoval	Singapore - Toll-free
11	Apr 11, 2013	c239fe3a-22ee-4026-8704-a32402ae24e8	pkoval	United States - Long distant
	Apr 11, 2013	c239fe3a-22ee-4026-8704-a32402ae24e8	269	United States - Long distan
	Any 11 2012 ady	-220fe2= 12ee 4028 0704 -22402-e24e6	County of County of County	United States I and distant

• Conference Room Reports – Shows details about OpenVoice conference rooms and organizers.

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	593296569 #trafilament	Fierdiand	ke-3225ep@jedis.com		
	67903802 Ibs/Marrel	Southwest .	ko-4p43#pp@pelik.com		
	265853769 A	4	ko-ege@jedx.com		
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4. Choose a date range either within the past year or between specific "From" and "To" dates.

### **Create Reports**

Shows a summary	of each organizer's product usage	
Silows a summary	or each organizer a product usage.	
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' Past 30 Davs		
<ul> <li>Past 30 Days</li> <li>Past 60 Days</li> </ul>	1/16/2012	
	Shows a summary	

- 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)

ilter by:	Show on this page	f a name or email address)	1-4 of
Name	( <b>q</b>	Status	Product
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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 <u>default product settings</u>. You can also edit specific GoToMeeting and GoToTraining features.

Account Name	
Odd	Edit
Default Product Settings	
<ul> <li>GoToMeeting</li> <li>GoToWebinar</li> <li>GoToTraining</li> <li>OpenVoice</li> </ul>	Edit
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Logo Choose a .gif or .jpg file up to 400 x 200 pi Attendees will see this logo when screen s	
Co-organizers Co-organizers are enabled. Organizers can within the account to start and share meet	Edit a select other co-organizers ings.
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## 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.

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

### 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.

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 spac and they can't select other co-organizers within the account to manage training sessions.	e

## **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.

stom Fi	eld	Add a Custom Field
test9		<b>D</b>
test	ustom Field	
@!\$	usion Field	
test	Custom Field Name:	
Tes		
Tes		Save Cancel
KIMMY		<b>D</b>
test54		圇

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

Email recording link

**Note**: Admins can also assign the GoToMeeting 25 plan and <u>GoToMeeting Essentials</u> to organizers on their account.

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

GoToMeeting	GoToWebinar	GoToTra	ining	OpenVoi	ce	
. Select Users o	r Groups					
ilter by: All Admir	• • • • •	ı		0		Show Featur *
Name		VolP		Long stance	Provide or audio	VolP     Long distance     Provide own audio
Jim Jones - Ad	tmin	-		-		<ul> <li>Display attendee list Grant mouse control</li> </ul>
1 Selected						Chat Recording Webcams
. Change Settin	gs					
Audio			Deta	ils	Recent	t Changes
VolP - requires microj	phone and speakers					
Long distance numbe	rs		Coun	tries		
Provide their own con	ference call service	in meetings				
Features	Let participants meetings	share web	cams du	ring	Recent	t Changes
Record Meetings	On - organize	er can change t	his feature	(	OUp	lated for 1 user.
Grant keyboard and	Disabled - or	ganizer cannot	use this fe	ature		
				Save Cancel		
Display the Attendee	List during meetings					
Let participants chat (	during meetings					
Lat norticipante abare	webcams during me	etinos				

## **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.

GoToN	GoToWebinar	GoToTraining	OpenVoic	e	
1. Sele Filter by:	All Users or Groups	arch for a name, em	nail or conferen		Show Features 👻
Name		VolP	Long distance	Toll-free	Provide own audio
<b>V</b> A	lex t - Admin	<b>.</b>	9	~	0
	lex2 Test - Admin	8		~	C
	man Singh	2	~		O
	Include Tell for New York		×	~	O
	Calearch for a country	STOF		~	$\Box$
	All Countries				C
	🖾 Argentina		•		0
	Australia				C
	Austria			2	0
	Bahrain			2	C
5827	Belarus			1-	-10 of 5827 💽 💽
	Belgium				
2. Ch	Reavil		•		
Aud	Available countries: None Selected Default countries: None Selected			Recent Ch	andes

### 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.

count Name		
Test Account		Edit
fault Product	Settings	
🖇 GoToMeeting		Edit
8 GoToWebinar		
🟶 GoToTraining	· · · · · · · · · · · · · · · · · · ·	
OpenVoice		
ToMeeting		
Logo	F	Remove
	citrix online	
	-	
Attendees will see	this logo when screen sharing is stopped.	
Co-organizers		Edit
Co-organizers are	enabled. Organizers can select other co-orga to start and share meetings.	
Co-organizers are	enabled. Organizers can select other co-orga to start and share meetings.	
Co-organizers are	enabled. Organizers can select other co-orga to start and share meetings.	
Co-organizers are within the account	enabled. Organizers can select other co-orga to start and share meetings.	nizers
Co-organizers are within the account	to start and share meetings.	nizers Edit
Co-organizers are within the account <b>DTOTraining</b> Branding Logos and custom registration pages	to start and share meetings.	Edit d
Co-organizers are within the account of To Training Branding Logos and custom registration pages Payment	to start and share meetings.	Edit d
Co-organizers are within the account of To Training Branding Logos and custom registration pages Payment	to start and share meetings.	Edit d
Co-organizers are within the account DTOTraining Branding Logos and custom registration pages. Payment Manage payment	t to start and share meetings.	Editi Editi
Co-organizers are within the account DTO Training Branding Logos and custom registration pages. Payment Manage payment Content Sharing	t to start and share meetings.	edit Edit

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

GoToWebinar		<b>OpenVoice Settings</b>
Settings	Settings	
VoIP - requires microphone and speakers	VoIP - requires microphone and speakers	Long distance numbers
Long distance numbers Provide their own conference call service in webinars	Long distance numbers Provide their own conference call service	Toll-free numbers Participants enter conference muted
Allow chat and Q & A in webinars		Conference can continue after organizer leaves
Let webinar staff members share webcams with 100 participants during webinars		Record conference
		Security code for each conference
		Client charge code
		Manage participants who call in early 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
	VoIP - requires microphone and speakers Long distance numbers Provide their own conference call service in webinars Allow chat and Q & A in webinars Let webinar staff members share webcams with 100 participants during webinars	SettingsSettingsVoIP - requiresVoIP - requiresmicrophone andmicrophone andspeakersLong distance numbersLong distance numbersProvide their ownconference call servicein trainingsAllow chat and Q & A inLet webinar staffwebinarsLet webinar staffmembers sharewebcams with 100participants duringwebinars

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.

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 m	eetings	Off		
Features		Status		
Record Meetings		Disabled		
Grant keyboard and mouse control to attende	es	On		
Display the Attendee List during meetings	Let participan meetings	ts share webcams du	ring	
et participants chat during meetings.	💿 On - organi	zer can <mark>chan</mark> ge this feature		
.et participants share webcams during meeting	Disabled - d	organizer cannot use this fe	eature	

#### 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 <u>international toll-free numbers</u>.

#### 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**.

oToMeeting GoToWebin	ar	GoToTrair	ning	OpenVoic	9	
Select Users or Groups						
er by: All Users 🔹	andrev 2	r.		0		Show Features
Name		VoIP		Long stance	Toll-free	Provide own audio
Andrew Harris		×		-	~	
1 Selected						1-1 of 1
Change Settings						
Audio			Deta	ils	Recent	Changes
/oIP - requires microphone and spe	akers					
long distance numbers			Cour	tries		
Toll-free numbers			Cour	tries	Upda	ited for 1 user.
Provide their own conference call s	Toll-	free numb	pers			
Features	۲	On - organi	zer can	change this fea	iture	
Record Meetings	0	Off - organizer can change this feature				
Grant keyboard and mouse control	0	Disabled - c	organize	er cannot use th	is feature	
					Save	Cancel
Display the Attendee List during me						

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

	eeting	GoToWebinar	GoToTraining	OpenV	/oice	
. Sel	Include	Toll-free Number	s for	×		
ilter b	Q Searc	h for a country	24000	$\square$	S	how Features 👻
Nam	🖾 Co	untry			Toll-free	Provide own
	E Fin	land		•		audio
	V Fra	nce	7	e i	~	
1 Se	🗐 Ge	rmany		The second se		1-1 of 1
	И Но	ng Kong				
. Ch	E Ice	land				
Aud	🗐 Ind	ia			Recent Ch	anges
VolP	🗐 Ind	onesia				
Long	Selected	countries: Canada Fran	ce, Hong Kong, United Ki	ngdom		

For GoToMeeting toll-free numbers, you can also select the Star icon an ext 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 in 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 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 micr	ophone 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 co	nference 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.

ser Settings lanage Groups	Filter by: All Users	Q 216	0	1-10 of 112 💽 🕨
Create Reports Admin Settings	Name +	Group	Status	Product
	🖾 Kim1.3 Chh1.3	smoketest-1386617976	Invited   Reinvite	<b>\$</b> \$ @
Organizer Seats	🖹 Riya Achtani - Manager	smoketest-1383601428	Invited Reinvite	<b>\$ \$</b> @
13 of 50000 in use	SOA User - Admin	1	Enabled	<b>\$ \$</b> @
GoTeWebinar 1000: 26 of 50000 in use	SOA User - Admin	1	Enabled	<b>\$ \$</b> 0
GoToTraining: 6764 of 50000 in use	SOA User - Admin	1	Enabled	<b>\$ \$</b> ()
OpenVbice: 5708 in use	🖾 SOA User - Admin	1	Enabled	<b>\$ \$</b> @
Need more seats? Contact us.	SOA User - Admin	1	Enabled	<b>\$ \$</b> @
	SOA User - Admin	1	Enabled	<b>\$ \$ (0)</b>
	E SOA User - Admin	1	Enabled	<b>\$ \$</b> @
	SOA User - Admin	1	Enabled	<b>\$ \$</b> @
	None Selected			1-10 of 112

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	Even: User Details for Kim1.3 Chh1.3	
Add Users	Even: User Details for Kin1.5 Chirt.5	
User Settings		
Manage Groups	User Information	
Create Reports	User mormation	
Admin Settings	Name: Kim1.3 Chh1.3 Edit	Status: Invited on Dec 9, 2013 Reinvite
Organizer Seats GoToMeeting 25: 13 of 50000 in use GoToWebhar 1000: 36 of 50000 in use	Email Address: to used 15th 175 Woldhomethic come Primary Language: English (US) - English (US) • Group: No Group •	
GoToTraining: 5754 of 50000 in use		
OpenVoice:	Role	
5706 in use Need more seats? Contact us.	Grganizer for GoTaMeeting 25     Sector GoTaMeeting 25     Sector GoToWebinar 1000 with GoToMeeting     Sector GoToTraining with GoToMeeting     Sector GoToTraining with GoToMeeting     Sector GoToTraining with GoToMeeting	Change Settings
	Administrator for this Account	
	Product Usage	
	OpenVoice     Conference Room Number: 849-801216 Resend Welcome Email     Organizer PIN: 9597742	
	Save Cancel	
bout Us   Terms of Service   P	wacy Policy	citrix.

### **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
88 GoToMeeting
Last Meeting: Apr 23, 2013
Scheduled Meetings: 8 Reassign Meetings @ OpenVoice
Conference Room Number: 472-771-446 Resend Welcome Email Organizer PIN: 6591155
Save Cancel

-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 Ro	port		
ebruary 28, 2014 01:36 AM SGT			
OpenVoice and OpenVoice Integr	ated 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		#firstName#	#lastName#
593298569		#firstName#	#lastName#
679839832	1234	#firstName#	#lastName#
490067134	9586637	7739321	cccc
405870601		Alex	test
156521013	9757332	Alex2	Test
	55555555555555	big	admin
133687922		ee	ee
699124898	2945201	elliot	barlas
118660292	3673551	elliot	test
383027607	4687988	foo	fleep