ManageYourConferencing

Account/User Control Center

Help File

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1-0 LOGGING IN AND GETTING STARTED

Because ManageYourConferencing is a website you will need internet access and a browser to use it. To get started open your internet browser and follow the steps below to log in:

1	Open your internet browser. **Pro-Tip:** ManageYourConferencing works best with Internet Explorer 7 or higher.
2	Type the following address into the address bar without the quotations (the address bar is the long white input box at the top of the browser as shown in Figure 1-1): 'www.ManageYourConferencing.com'.
3	Once you've completed step 2, press enter and you will be brought to the login screen as shown in Figure 3-2.
4	You will be prompted to enter your Login Name and Password. If you do not have a Login contact your conference service provider. If you do, enter them into their appropriate boxes. **Pro-Tip:** The password input box will hide your characters and replace them with black circles. This is normal and is designed to prevent others from reading your password off the screen.
5	Once you've typed in your correct Login and Password click the "**Log In**" link to enter the [Data Portal}.

1-1 LOGGING IN SCREEN

The following illustrations depict the ManageYourConferencing login procedures. **Note:** Images may be altered to fit on the page.

Figure 1-1 Browser Address Bar

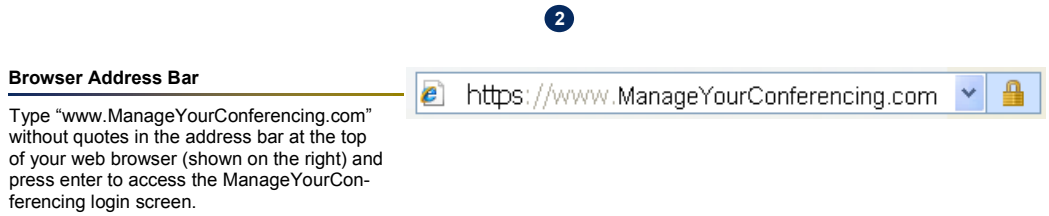
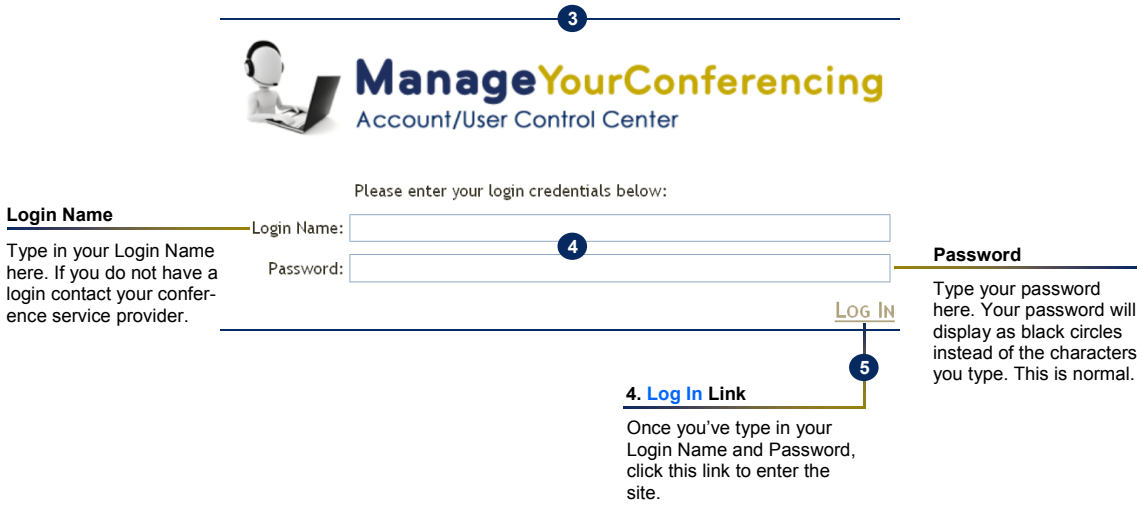


Figure 1-2 ManageYourConferencing Login Screen



2-0 MANAGEYOURCONFERENCING (MYC) OVERVIEW

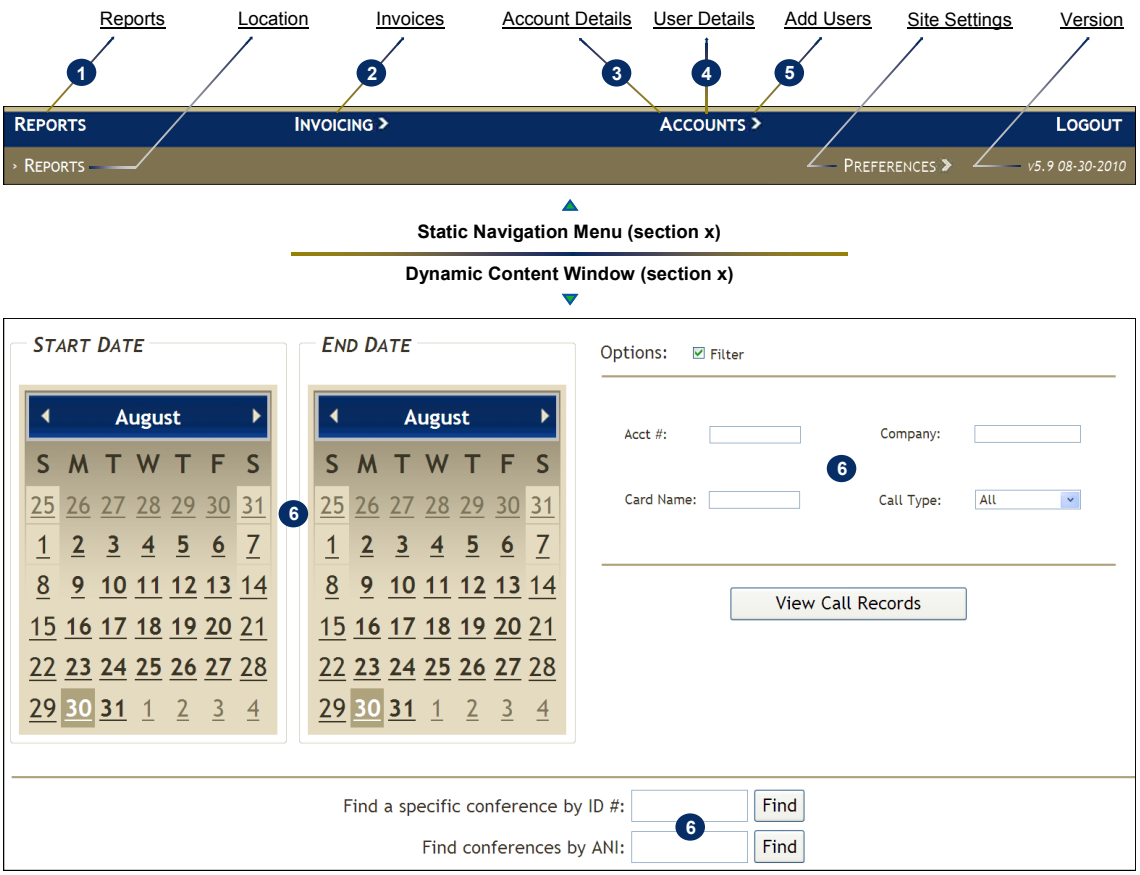
ManageYourConferencing is a robust client administration tool that you can use to manage, track, and modify your conference services. Figure 1-1 displays MYC with its default landing page—Reports—selected. With ManageYourConferencing you can:

1	Generate Reports based on your usage and users. Reports are covered in depth in section x.
2	View, pay, search and sort your invoices. Invoices are covered in depth in section x.
3	View and manage your account details. Account details (Account Info) is covered in depth in section x.
4	View and manage your user (code) details. User details (User Info) is covered in depth in section x.
5	Add users (codes). The ability to add users is covered in depth in section x.
6	View, search, sort and filter your conference history by users, phone numbers, call types, and conference IDs.

2-1 MANAGEYOURCONFERENCING (MYC) INTERFACE DISSECTION

ManageYourConferencing is constructed of two separate zones which are combined to create the interface. The first zone—located at the top of the screen—houses a static Navigation Menu that appears on every page and always remains the same. The second zone—located directly beneath the Navigation Menu houses dynamic page content that changes based on your actions. The below illustration dissects MYC into its separate zones using the Reports Search Screen as the dynamic example for the lower zone. **Note:** Images may be altered or condensed to fit on the pages throughout this document.

Figure 2-1 ManageYourConferencing Interface Dissection (Using the Reports Search Screen for the Example)



3-0 MANAGEYOURCONFERENCING (MYC) COMPONENTS

You can think of ManageYourConferencing as your home base for managing your conferencing services. MYC can be broken down into the following major components:

Figure 3-1 Navigation Menu (Covered in Section 4)

MYC employs a navigation menu at the top of each page that can be accessed from anywhere in the web site. Use it check information, change settings and navigate around the application:

♦ Reports	♦ Invoicing
♦ Account Info	♦ User Info
♦ Pre-Registrations	♦ Preferences
♦ Logout	♦ Version Number

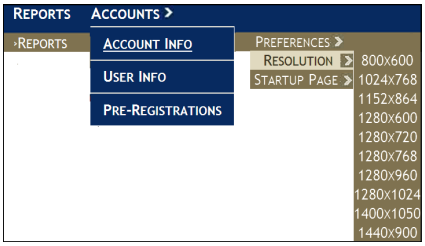


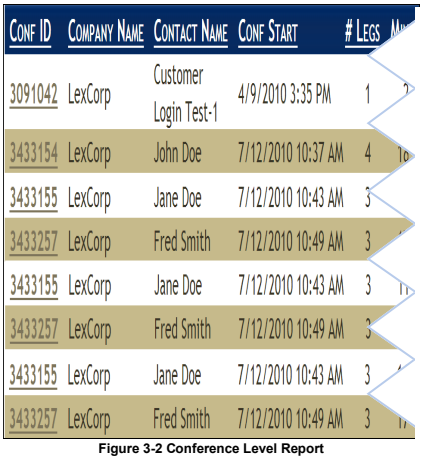
Figure 3-1 Navigation Menu

The Navigation Menu can be thought of your ManageYourConferencing directory and control panel. Not only does it grant the ability to navigate the site, it also controls your personal preferences. Preferences at this time include your the ability to set your desired screen resolution (this determines how the MYC fits on your computer screen) and the ability to change your default Startup Page (Startup Page options include Reports, User Info and Account Info). In addition you can use the Navigation Menu to check the Version Number and Logout of the site. The Navigation Menu is covered in depth in Section 4.

Figure 3-2 Reports (Covered in Section 5)

ManageYourConferencing allows you to generate conference reports that can display your conference history in various ways. Using the reporting feature you can:

♦ Create Detailed Conference Reports	♦ Export the Results to Excel
♦ Filter the Results	♦ Sort the Results By Any Field
♦ Drill Down to Conference and Call Levels	♦ Print the Results
♦ Results Include Conference Costs	♦ Results Include Tax Charges



CONF ID	COMPANY NAME	CONTACT NAME	CONF START	# LEGS
3091042	LexCorp	Customer Login Test-1	4/9/2010 3:35 PM	1
3433154	LexCorp	John Doe	7/12/2010 10:37 AM	4
3433155	LexCorp	Jane Doe	7/12/2010 10:43 AM	3
3433257	LexCorp	Fred Smith	7/12/2010 10:49 AM	3
3433155	LexCorp	Jane Doe	7/12/2010 10:43 AM	3
3433257	LexCorp	Fred Smith	7/12/2010 10:49 AM	3
3433155	LexCorp	Jane Doe	7/12/2010 10:43 AM	3
3433257	LexCorp	Fred Smith	7/12/2010 10:49 AM	3

Figure 3-2 Conference Level Report

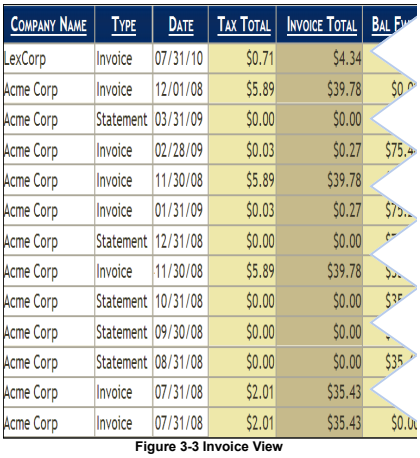
To access the Reports screen click the 'Reports' menu located on the far left of the Navigation Menu. Reports are useful for tracking your account usage. For instance, the report shown in Figure 3-2 is known as the Conference Level Report. This report groups your usage together at the conference level, meaning that—from this view—you will see each conference as a whole and not each individual participant that joined the conference. From here, you can drill down to individual participant level by clicking the Conf-Id links in the Conf-Id column located on the far right of Figure 3-2.

Reports support a number of filters which you can use to generate reports with selective information based on fields such as your users, the phone numbers they are calling from, the dates the calls occurred and even the type of call (reservationless, operator assisted, web, playback). In addition, the reports can be sorted by their column headings and even exported to excel for data mining. See Section 5 for more information on Reports and how to use them.

Figure 3-3 Invoicing (Covered in Section 6)

ManageYourConferencing allows you to view and pay your invoices and statements as shown list form in Figure 3-3. You can:

♦ View Past Invoices and Statements	♦ Pay Your Invoices With Paypal
♦ Download Your Invoices in PDF Form	♦ View Breakdowns of Your Charges
♦ Sort Invoices By Charge Amounts	♦ Export Your Invoice List to Excel
♦ Print the Invoice List	♦ Filter the Invoice List



COMPANY NAME	TYPE	DATE	TAX TOTAL	INVOICE TOTAL
LexCorp	Invoice	07/31/10	$0.71	$4.34
Acme Corp	Invoice	12/01/08	$5.89	$39.78
Acme Corp	Statement	03/31/09	$0.00	$0.00
Acme Corp	Invoice	02/28/09	$0.03	$0.27
Acme Corp	Invoice	11/30/08	$5.89	$39.78
Acme Corp	Invoice	01/31/09	$0.03	$0.27
Acme Corp	Statement	12/31/08	$0.00	$0.00
Acme Corp	Invoice	11/30/08	$5.89	$39.78
Acme Corp	Statement	10/31/08	$0.00	$0.00
Acme Corp	Statement	09/30/08	$0.00	$0.00
Acme Corp	Statement	08/31/08	$0.00	$0.00
Acme Corp	Invoice	07/31/08	$2.01	$35.43
Acme Corp	Invoice	07/31/08	$2.01	$35.43

Figure 3-3 Invoice View

To access the Invoicing screen click the 'Invoices' submenu of the 'Invoicing' menu on the Navigation bar. The invoicing system allows you to view your entire invoice history in table form and allows you to download this history into an excel file that you can use for cost analysis or other tracking. In addition, by making your conference history available in an Excel document you will be able to use the document to search for specific callers, conference costs, billing codes, conference dates and times, misc charges etc. Excel also provides the ability to create graphs and charts of your usage history if you're so inclined. In addition to the Excel format, you can also download your invoices in PDF form, and pay your invoices from the site itself. Go to Section 6 for a more thorough lesson on the Invoicing capabilities of ManageYourConferencing.

Figure 3-4 Accounts (Covered in Section 7)

ManageYourConferencing allows you to modify your account information and settings as shown in Figure 3-4 via the 'Account Info' page. You can:

♦ Change the Account's Name	♦ Change the Account's Primary Contact
♦ Change the Account's Address	♦ Change the Account's Time Zone
♦ Change the Account's Email Address	♦ Change the Invoice Delivery Method
♦ Change the Account's Phone Number	♦ Add Users to the Account

To access this view, click the 'Account Info" submenu of the 'Accounts' menu in the Navigation bar. From here you can view and edit your account(s) by clicking the Edit link above the Account Details box on the right side of the screen. Doing so will open up various options including the ability to change your admin and billing email addresses along with your office street address. Your account information determines how and where you will receive your invoice, so it is important that this information is correct and up to date.

Any changes you make in the Account Info view will take effect immediately. If you make a mistake or are not happy with the changes you've made you can always change them again by simply clicking the Edit link once more and updating the information as necessary. One more important item to note about the Account Info page is that this is where you add users (codes) to your account, by clicking the 'Add Users' link in the Read Only version of the Account Details Box. The Account Info page is covered in depth in Section 7.

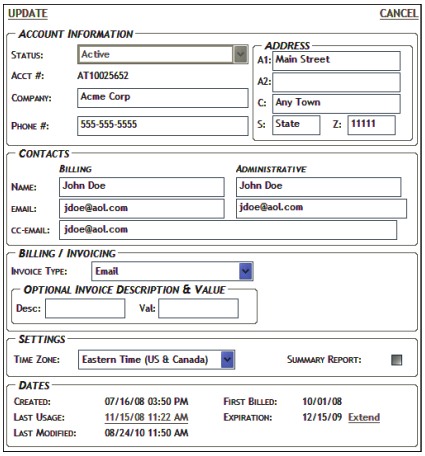


Figure 3-4 Update Account Info View

Figure 3-5 Users (Covered in Section 8)

ManageYourConferencing allows you to view and modify your User settings as shown in Figure 3-5 via the 'User Info' page. You can:

♦ Change the User's Card Name	♦ Change the User's Phone Number
♦ Change the User's Address	♦ Change the User's Time Zone
♦ Change the User's Contact List	♦ Change the Users Conference Settings
♦ Change the User's Billing Code	♦ Enable/Disable the Phone Usage Reports
♦ Change the User's Codes	♦ View Last Usage Dates

To access this view, click the 'User Info' submenu of the 'Accounts' menu in the Navigation bar. You can edit each individual user by clicking the edit button above the User Details box located on the right side of your screen. Doing so will open up various options including the ability to change each user's conference room settings. Some important settings include Roll Call, Entry and Exit tones and whether or not your conference can begin without a Host/Moderator present.

Any changes you make to your users will take effect immediately. If you make a mistake or are not happy with the changes you've made you can always change them again by simply clicking the Edit link once more and updating the information as necessary. The User Info page is covered in depth in Section 8.

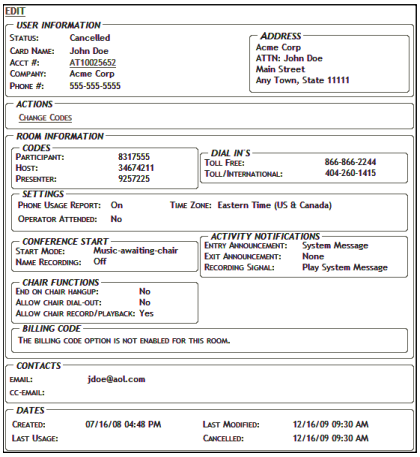


Figure 3-5 User Info View

Figure 3-6 Add New Users (Covered in Section 9)

ManageYourConferencing allows you to add new users which means you can add additional sets of codes that you can hand out to people in your organization. The 'Add New User' form is where you setup new users and choose your conference settings including:

♦ Conference Start Mode	♦ Entry Announcements
♦ Name Recording	♦ Exit Announcements
♦ End on Chair Hang-up	♦ Allow Chair Record/Playback

To access the 'Add New Users' module, first go to the 'Account Info' view by selecting it from the 'Accounts' menu in the Navigation bar. Once there, choose your account and click the 'Add Users' link in the Account Details screen on the right side of the page. This will bring you to the Add Users module where you can fill out the details of your new user.

Once you've chosen all the proper settings for your new user click the Add User link at the top of the page. Doing so will add the user to your account and make your codes available for use. If you wish to make changes to any of your users, you can do so in the User Info page detailed above. Visit Section 9 for more information on Adding New Users.

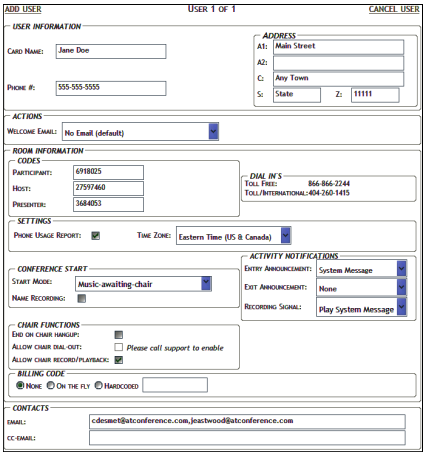


Figure 3-6 Add Users View

4-0 INTRODUCING THE NAVIGATION MENU

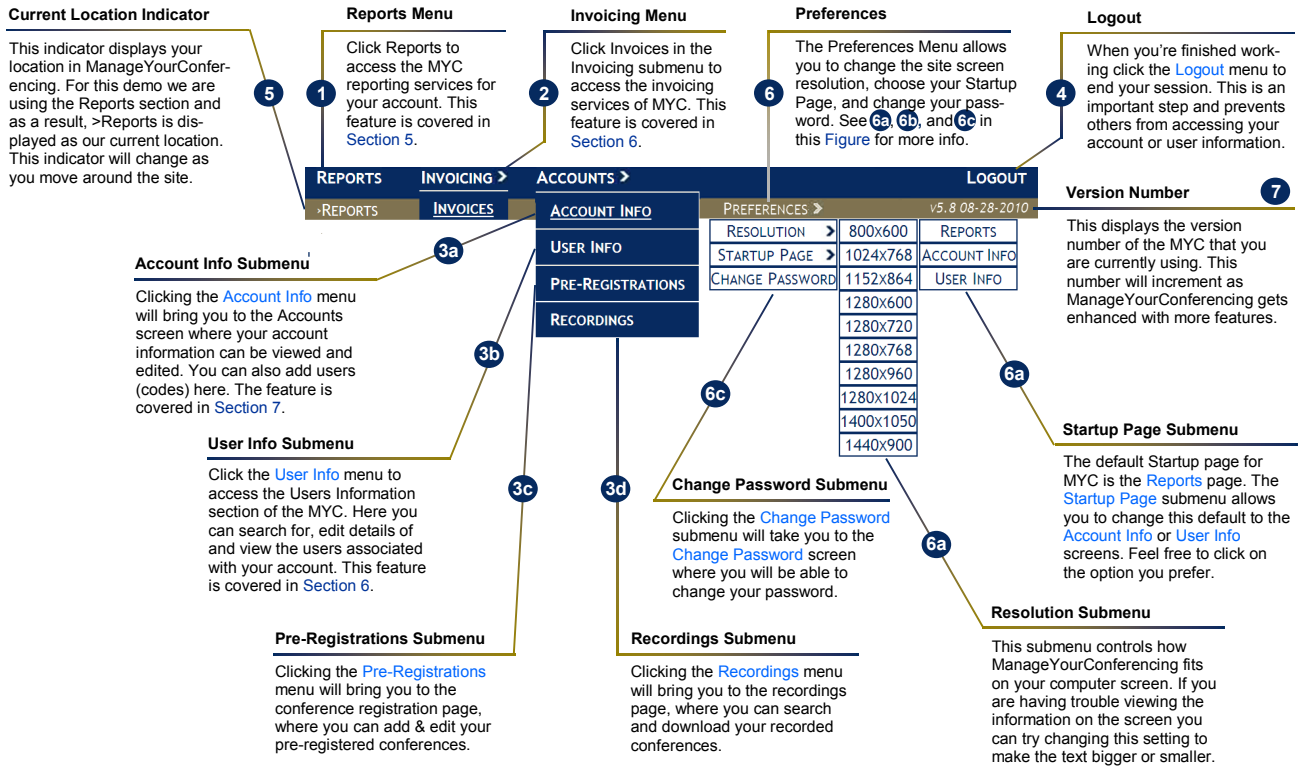
Running along the top of ManageYourConferencing you will find consistent Navigation Menu throughout the entire site, which—with a few exceptions—can be accessed from any page in on the site. From the Navigation Menu (shown in Figure 4-1) you can:

1	Navigate to your Reports where you can create, filter and sort conference and account reports.
2	Navigate to your Invoices where you can view, search, sort, export to excel, and pay your invoices.
3	a Navigate to your Account Info where you can view\update your account info and add users (codes). b Navigate to your User Info where you can view\update your user info and change your codes. c Navigate to your Pre-Registration where you can view and edit your pre-registration conferences. d Navigate to the Recordings page where you can view and download your conference recordings.
4	Logout of ManageYourConferencing. This will safely end your current session.
5	View a helpful indicator that displays your location on ManageYourConferencing.
6	a Change the resolution of the site (do this if the site doesn't display correctly on your screen). b Change your default Startup Page (options include Reports, Account Info and User Info). c Change your site password (do this if your password gets compromised).
7	View the Version Number.

4-1 Navigation Menu Illustration

The following illustrations depict the MYC Navigation Menu. **Note:** Images may be altered or condensed to fit on the page.

Figure 4-1 Navigation Menu



5-0 Reports

After logging in (visit Section 2 for information on logging in), you will be brought to your default landing page (you can change your landing page in the Navigation Bar > Preferences > Startup Screen submenu). The default landing page is the Reports Search Screen of ManageYourConferencing, which we will cover in this Section. From the Report Search Screen you can:

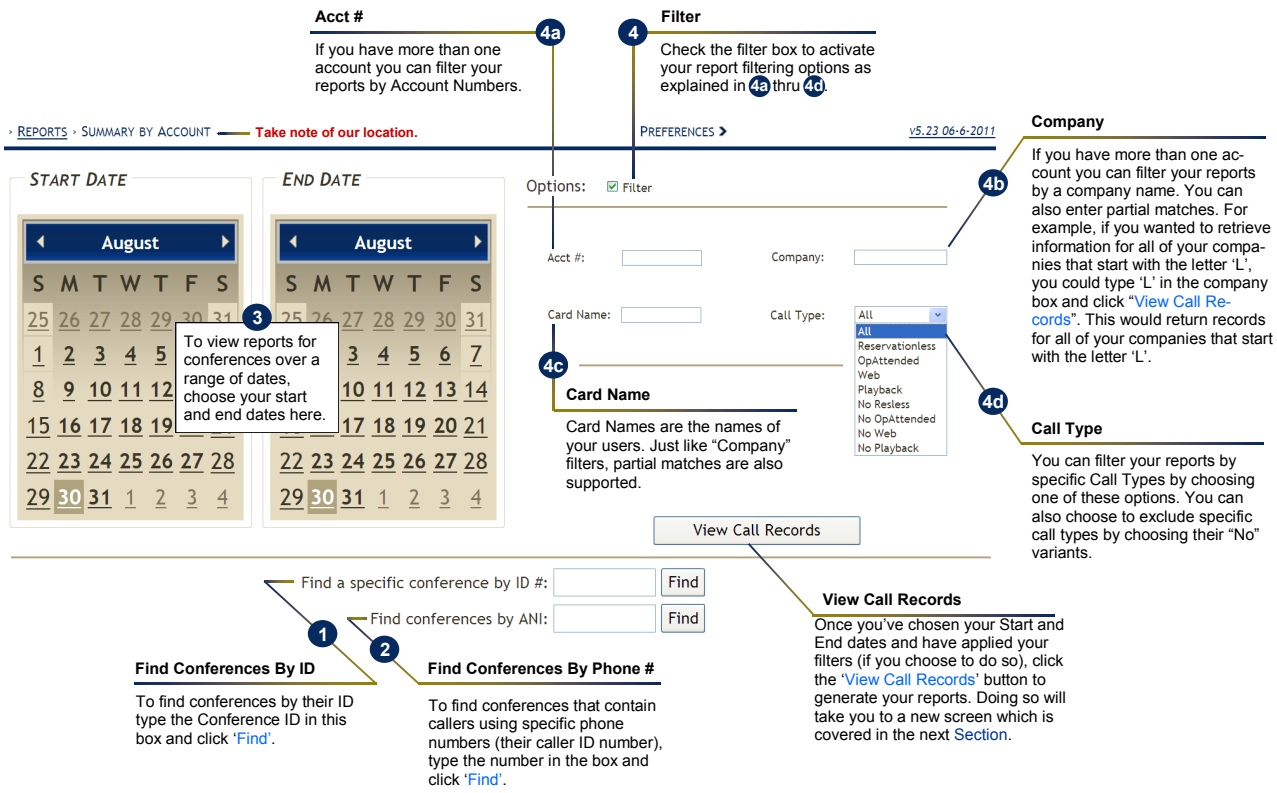
1. Search for conferences by conference ID. The Conference ID is a unique number which identifies all of your conferences. You can find Conference IDs on your invoice under the heading 'Conference ID'.
2. Search for conferences by ANI. The ANI is the phone number that a participant is calling from, i.e. their caller ID number. This is useful for finding callers that have joined your conferences by their phone number.
3. Search for conferences with a range of dates. For example, if you wanted to retrieve every conference that occurred in the last day, week, month, year, or any date range in between, you can do so by choosing a date range in the two calendars shown in Figure 5-1.
4. Include filters in your conference queries when searching by a range of dates. Filters include:
   - a. **Account:** If you have more than one account you can filter your reports to include only a specific account.
   - b. **Company:** Similar to the Account option above, you can filter your reports by a company name.
   - c. **Card Name:** Your Card Names are the names of your users, and you can filter reports based on them.
   - d. **Call Type:** Your conferences can be one of various types. Conference types include:
     - i. **Reservationless:** These are OnDemand calls with no operator assistance.
     - ii. **Op Attended:** These calls include the assistance of an operator (see your conference provider for more info).
     - iii. **Playback:** When you listen to a recording through the conference system a playback conference is created.

   In addition to filtering by these call types, you can also exclude them by choosing their "No" variants as shown in part 4d of Figure 5-1.

5-1 Reports Search Screen

The following illustrations depict the search/filter section MYC Reports screen. This is where you begin when creating reports.

Figure 5-1 Reports Search Screen



5-2 Ways To Search For Reports

5-2 Ways To Search For Reports

The last section gave a holistic view of the Reports Search Screen and a quick summary of the function of each element. You learned that you can choose what data to retrieve based on Start and End dates and specific Filters that you can apply to your searches. In the following sections we will outline the types of reports you can run and the types of results you can expect from them, along with the specific steps involved in running them and how to choose your report types, date ranges, and filters.

Ways to Search for Reports

Reporting on ManageYourConferencing can be broken down into two fundamental elements: Reports Types and how to search for them. Specifically, there are four ways to search for reports and three Report Types. The four ways to search are by:

1. **Conference ID:** Search for conferences by their Conference IDs (shown on your invoice). Because Conference IDs are unique and are tied to only one specific conference they represent a one-to-one ratio with each conference call you initiate. Because of this, searching by a Conference ID will return only one result per search, and will bring you to a Conference Level Result Screen (see below for information on Result Levels and Screens). For instructions on how to search by Conference IDs and generate a Conference Report see Figure 5-6 in Section 5-5.
2. **Phone Number with Date Range:** Search for conferences by the Phone Numbers (caller ID) of participants that join your conferences as shown in Figure 5-7 of Section 5-5. This option will search your conference history—within a range of dates that you must first choose from the calendars above the search box—and will return every conference that has one or more participants who dialed into the conference from the caller ID number you provided within the range of dates you chose. For instructions on how to generate reports based on Phone Numbers (caller IDs) see Figure 5-7 of Section 5-5.
3. **Conferences by Date Range:** Search for conferences by Start and End dates with no filters applied as shown in Figure 5-8 of Section 5-5. This option will return all of your conference history within a range of dates that you select for all of your accounts. For instance, if you wanted every conference for the month of April, you would choose your Start Date to be April 1 with your End Date being April 30. For instructions on how to generate reports based on a range of dates see Figure 5-8 of Section 5-5.
4. **Conferences by Date Range With Filters:** Search for conferences by Start and End dates with filters applied. This option will return all of your conference history within a range of dates, but it will filter out results based on the filters you select. For instance, if you wanted every conference for the month of April that only included Operator Assisted calls, you would select your Start Date to be April 1 with your End Date being April 30, with the Call Type Filter set at 'OpAttended'. For instructions on running this Report see Figure 5-9 of Section 5-5.

5-3 Report Scope and Navigation

Once you have chosen your report search path from the above four choices and have run your report, you will be brought to the Report Results screen. Depending on how you searched (see your choices in Section 5-2), the Report screen will display one of three possible reports. You can think of each of these three reports as different scopes of information starting from the top and most encompassing level—the **Summary By Account Report** which displays summaries of all of your accounts—to the bottom most specific level—the **Conference Detail Report** which displays a breakdown of a single specific conference.

Figure 5-2 Report Types and their Information Scopes

1. **Summary by Account Report:** When generating reports that return results for all of your accounts, you will be brought to the **Summary by Account Report**. This report will display a list of your accounts with a summary of their usage (if you only have one account then it will only show one account), along with links that will take you to the lower, more specific **Summary by Conference Report** where you can view a list of Conferences that are relevant to your search. You will be brought to the **Summary by Account Report** when searching by the Date Range and Date Range With Filters options outlined in Sections 5-1 and 5-2. From this level you can also filter your currently displayed results. See Figure 5-3 in Section 5-4 for more detailed information about this report and Figure 5-8 in Section 5-5 to learn how to search for it.
2. **Summary by Conference Report:** The **Summary by Conference Report** contains a list of relevant conference(s) and their summaries along with links for each that will take you to the lower, more specific **Conference Detail Report**. You can access the Summary By Conference report by following links from the **Summary By Account Report** or by searching for a Phone Number (caller ID) from the Reports Search Screen. From this level you also have the ability to filter your currently displayed results. For more detailed information about this report see Figure 5-4 in Section 5-4 and to learn how to search for it see Figure 5-7 in Section 5-5.
3. **Conference Detail Report:** When searching for single conferences using the "Find Conference by ID" search function on the Reports screen you will be brought to the **Conference Details Report**. This Report will only show a single conference, which makes sense because—as mentioned previously—Conference IDs are unique. You can also access this level from the **Summary by Conference Report** by following the Conference ID links located there. In addition, from this level you can change the billing code for the conference you have selected. See Figure 5-5 in Section 5-4 for more detailed information about this report and Figure 5-6 in Section 5-5 to about learn how to search for it.

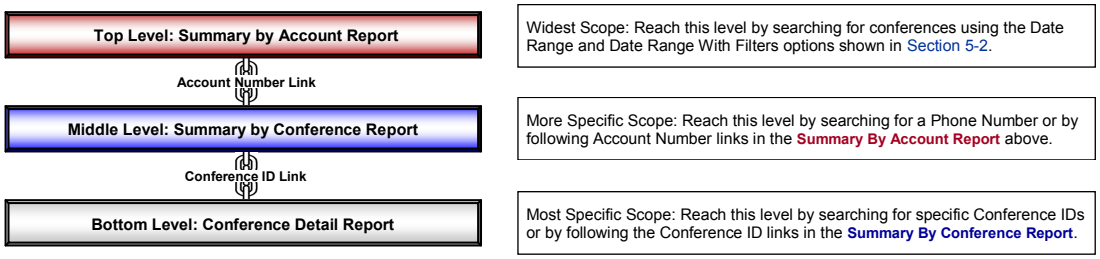


Figure 5-2 Report Scope Diagram

5-4 REPORT BREAKDOWNS AND FILTERING OPTIONS

To recap, each of the three Reports has a different scope from which you can view your summary information. The widest scope is the **Summary by Account Report**. At this level you are shown all of your Account(s) with a summary of your usage for each. The next more specific scope is the **Summary by Conference Report** where you are shown the conference(s) relevant to your search with a summary of each one. The final and most specific scope is the **Conference Detail Report**, from which you will be able to view information for a single conference.

Starting from the top **Summary by Account Report** scope, each level is linked to its lower level. For instance, the top Account level contains links for each account that you have. Each of those Account level links will take you to the **Summary By Conference Report** level for the account that you click on. So if you have two accounts and you want to see the Conferences for only one of them, you would click on the Account Number link for the Account you are looking for. Doing so will take you to the **Summary By Conference Report** level for that account **where you will see results relevant to your original search on the** Report Search Screen.

In the **Summary by Conference Report** level you will have one or more conferences with summaries associated with each one. In addition to a summary, each conference record will have a Conference Id link—similar to the Account Number links in the above **Summary By Account Report** level—that you can click which will bring you to the next, lowest level in the chain—the **Conference Detail Report** —where you will be able to view detailed information about a specific conference that you selected in the above level.

In essence, this scope functionality allows you to generate reports that start with a birds eye view of your conference information at the widest possible scope—the Accounts Level—and from there allows you to hone in on the information you're interested in by following links and going from a wider scope to a narrower one. This is called drilling down. In the following diagrams we will map out each Report to give you an idea of what to expect when it comes time to drill down your own Reports. One final note, each Report has its own set of options. The **Summary by Account** and **Summary by Conference Reports** allow you to do filtering on your current result set, while the **Conference Detail Report** allows you to change the billing code for the conference on the screen. These options along with each Report Result Level are shown and outlined in the following illustrations.

Figure 5-3 Top Level: Summary By Account Report

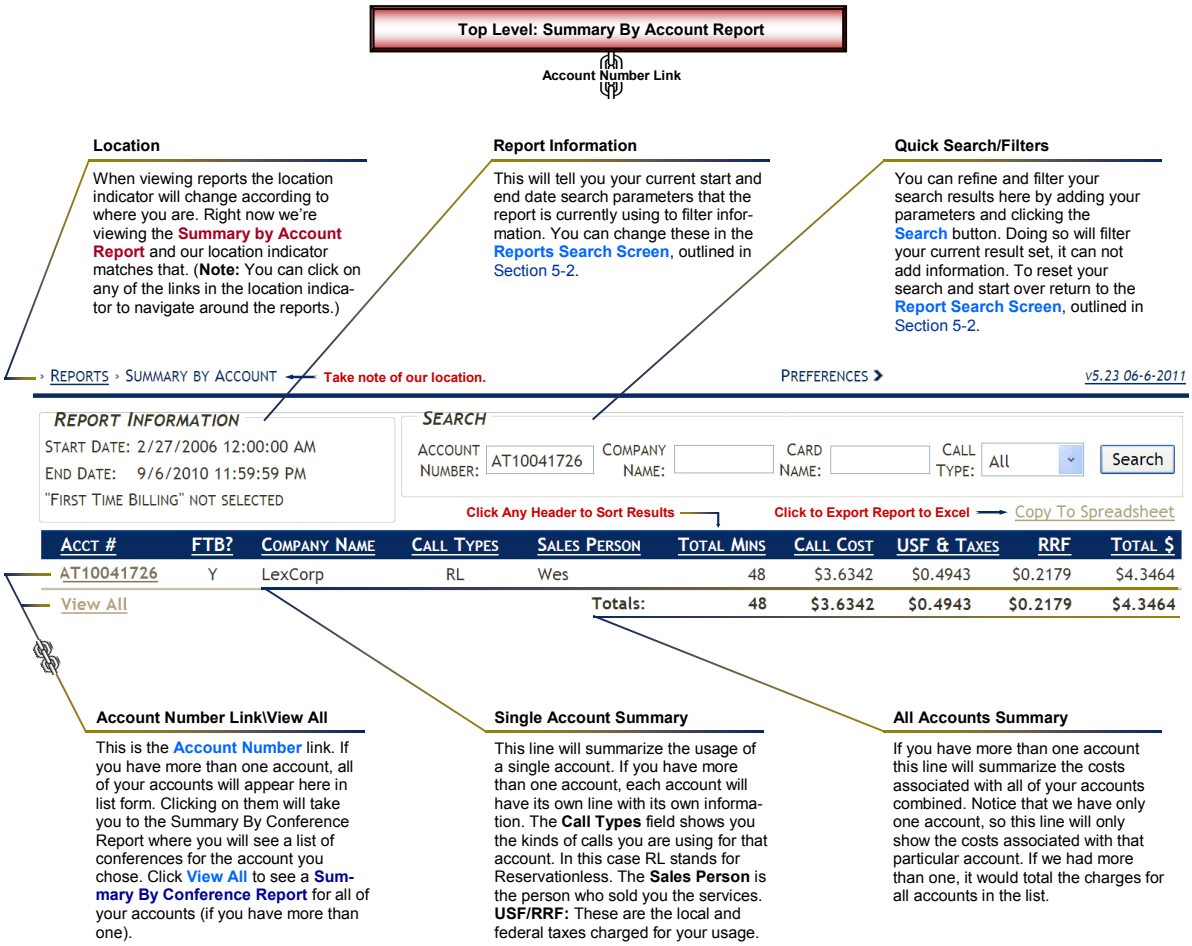


Figure 5-4 Middle Level: Summary By Conference Report

Middle Level: Summary By Conference Report

Conference ID Link

Location

When viewing reports the location indicator will change according to where you are. Right now we're viewing the **Summary by Conference** Report and our location indicator matches that. (**Note:** You can click on any of the links in the location indicator to navigate around the reports.)

Report Information

This will tell you your current start and end date search parameters that the report is currently using to filter information. You can change these in the **Report Search Screen**.

Quick Search/Filters

You can refine and filter your search results here by adding your parameters and clicking the search button. Doing so will filter your current result set, it can not add information. To reset your search return to the **Report Search Screen**.

› Reports › Summary by Account › Summary by Conference ← Take note of our location. Preferences › v5.23 06-6-2011

Report Information
Start Date: 2/27/2006 12:00:00 AM
End Date: 9/6/2010 11:59:59 PM
"First Time Billing" not selected

Search
Card Name: Call Type: All Search

Click Any Header to Sort Results — Click to Export Report to Excel → Copy To Spreadsheet

Conf ID	Acct #	Company Name	Contact Name	Call Type	Conf Start	# Legs	Conf Mins	Conf Cost	USF	RRF	Total $
3091042	AT10041726	LexCorp	Customer Login Test-1	RL	4/9/2010 3:35 PM	1	2	$0.0002	$0.0000	$0.0000	$0.0002
3433154	AT10041726	LexCorp	John Doe	RL	7/12/2010 10:37 AM	4	18	$1.4220	$0.1934	$0.0852	$1.7006
3433155	AT10041726	LexCorp	Jane Doe	RL	7/12/2010 10:43 AM	3	11	$0.8690	$0.1182	$0.0522	$1.0394
3433257	AT10041726	LexCorp	Fred Smith	RL	7/12/2010 10:49 AM	3	17	$1.3430	$0.1827	$0.0805	$1.6062

Conference ID Links

These are the Conference ID links. Clicking on them will take you to the **Conference Detail Report** for the one you clicked, where you will see breakdown of the conference including participants and cost.

Figure 5-5 Bottom Level: Conference Detail Report

Bottom Level: Conference Detail Report

Location

When viewing reports the location indicator will change according to where you are. Right now we're viewing the **Conference Detail Report** and our location indicator matches that. (**Note:** You can click on any of the links in the location indicator to navigate around the reports.)

Report Information

This will tell you your current conference ID search parameters along with information related to the conference. and end date search parameters that the report is currently using to filter information. You can change these in the **Reports Search Screen**.

Change Billing Code

When viewing any conference through the **Conference Detail Report** you are able to change the billing code for that specific conference. To do so type your desired code into the Billing Code input box and click the **Change/Add** button.

› Reports › Summary by Account › Summary by Conference › Conference Detail ← Take note of our location. v5.23 06-6-2011

Report Information
Conference ID: 3433154 Company Name: LexCorp
Account Number: AT10041726 Contact Name: John Doe
Conference Start Time: 7/12/2010 10:37 AM
Billing Code: Sales Change/Add

Click Any Header to Sort Results — Click to Export Report to Excel → Copy To Spreadsheet

Call #	Connect Time	Disc Time	Role	Rate Code*	DNIS	Caller ID	Duration	Call Cost	USF	RRF	Total $
1	10:37 AM	10:43 AM	Participant	8	8662101669	6317029400	6	0.4740	0.0645	0.0284	0.5669
2	10:37 AM	10:43 AM	Chair	8	8662101669	6317029400	6	0.4740	0.0645	0.0284	0.5669
3	10:38 AM	10:41 AM	Participant	8	8662101669	6312784395	3	0.2370	0.0322	0.0142	0.2834
4	10:40 AM	10:43 AM	Participant	8	8662101669	6319781412	3	0.2370	0.0322	0.0142	0.2834
						Total	18	$1.4220	$0.1934	$0.0852	$1.7006

Find a specific conference by ID #: Find

Change Conference Report By ID

From this Report you can change your currently viewed conference at any time by typing in a new conference ID here and clicking **Find**.

5-5 RUNNING REPORTS AND GETTING RESULTS (CONTINUED)

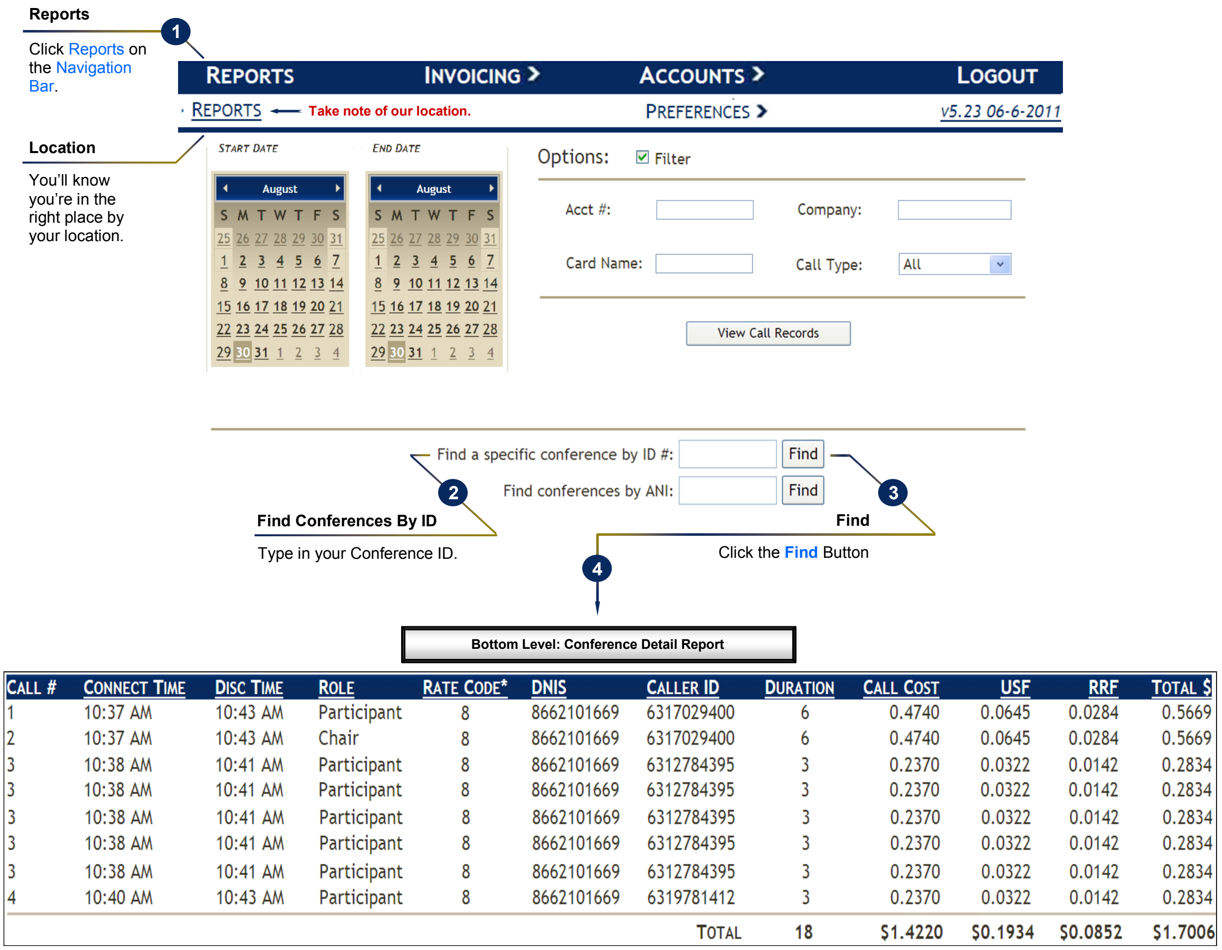
5-5 RUNNING REPORTS AND GETTING RESULTS

The previous Section explained the Report Types available to you and the Result Types you can expect from them. This section will provide step-by-step instructions for searching for and generating each of the three Report Types.

Figure 5-6 Search By Conference ID

To search for a specific conference by a Conference ID and generate a **Conference Detail Report** follow the steps below:

❶	Navigate to the Reports section of MYC by clicking the Reports menu on the far top left of the Navigation Bar.
❷	At the bottom of the Reports screen, type your Conference ID in the 'Find A Specific Conference by ID' input box. Your Conference ID is a unique conference number that you can find on your invoice.
❸	Once you've typed in your Conference ID, click the 'Find' button to the right of the input box.
❹	If the Conference ID you entered in Step 2 is valid and tied to your account you will be brought to the **Conference Detail Report** where you can view your conference details (who joined, when, how long they stayed and the charges for it). If there is no data available for the Conference ID you selected or you miskeyed your entry you will be taken to an empty report screen with the message "Conference ID does not exist". If this happens you can return to the Reports Search Screen to search again by following step 1 in this tutorial.



Reports

Click Reports on the Navigation Bar.

Take note of our location.

Location

You'll know you're in the right place by your location.

Find Conferences By ID

Type in your Conference ID.

Find

Click the **Find** Button

Bottom Level: Conference Detail Report

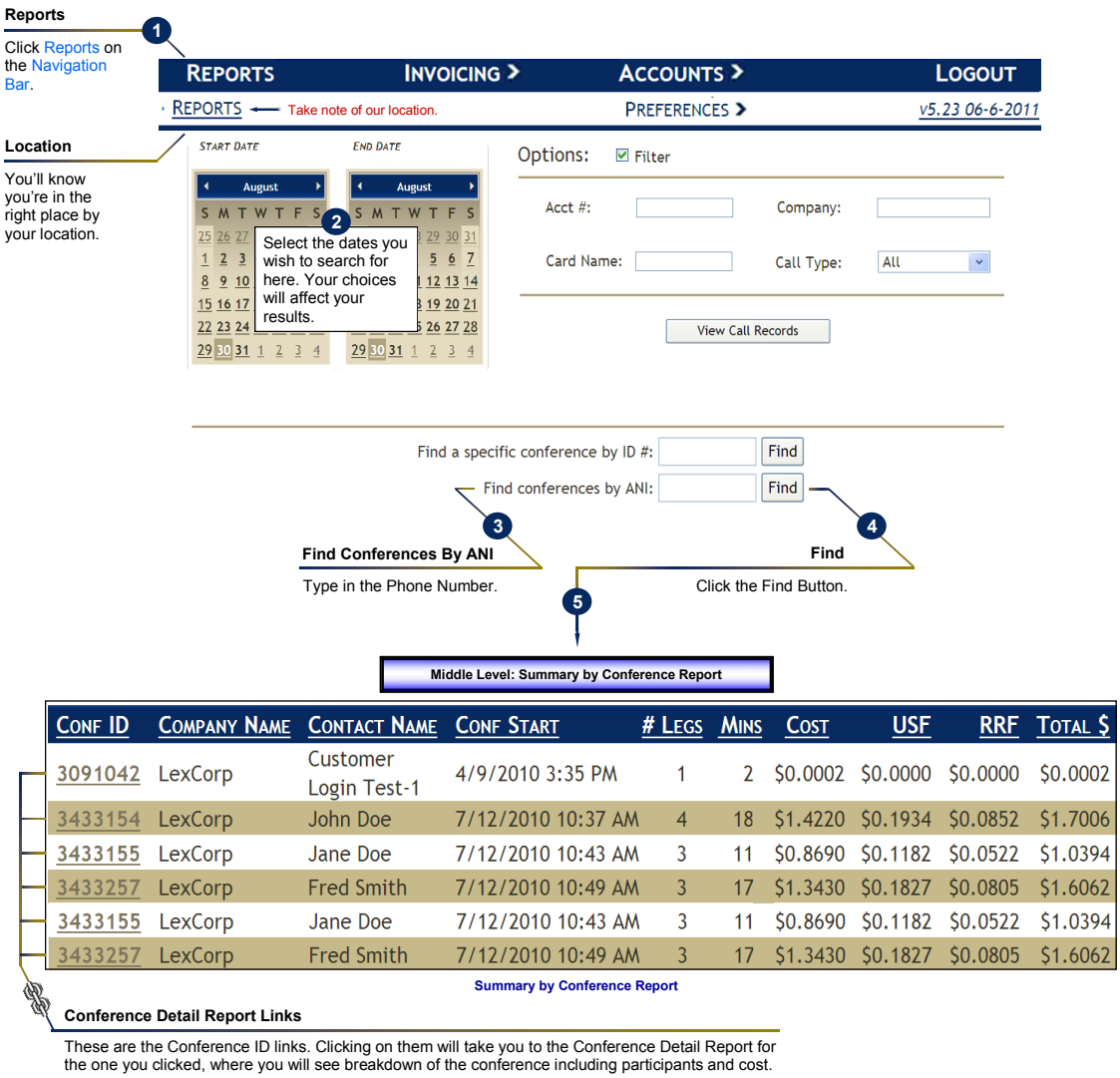
CALL #	CONNECT TIME	DISC TIME	ROLE	RATE CODE*	DNIS	CALLER ID	DURATION	CALL COST	USF	RRF	TOTAL $
1	10:37 AM	10:43 AM	Participant	8	8662101669	6317029400	6	0.4740	0.0645	0.0284	0.5669
2	10:37 AM	10:43 AM	Chair	8	8662101669	6317029400	6	0.4740	0.0645	0.0284	0.5669
3	10:38 AM	10:41 AM	Participant	8	8662101669	6312784395	3	0.2370	0.0322	0.0142	0.2834
3	10:38 AM	10:41 AM	Participant	8	8662101669	6312784395	3	0.2370	0.0322	0.0142	0.2834
3	10:38 AM	10:41 AM	Participant	8	8662101669	6312784395	3	0.2370	0.0322	0.0142	0.2834
3	10:38 AM	10:41 AM	Participant	8	8662101669	6312784395	3	0.2370	0.0322	0.0142	0.2834
3	10:38 AM	10:41 AM	Participant	8	8662101669	6312784395	3	0.2370	0.0322	0.0142	0.2834
4	10:40 AM	10:43 AM	Participant	8	8662101669	6319781412	3	0.2370	0.0322	0.0142	0.2834
						TOTAL	18	$1.4220	$0.1934	$0.0852	$1.7006

Conference Detail Report

Figure 5-7 Search By Phone Number (Date Ranges Required)

To search for Caller ID's within a specific date range and generate a **Summary by Conference Report** follow the steps below:

1. Navigate to the Reports section of MYC by clicking the Reports menu on top far left of the Navigation Bar.
2. Use the two calendars to choose the conference dates you wish to check for the phone number you're searching for. Any conferences not within the date range you choose here will be excluded from the report. (**Important Note:** The left calendar is for your start date and the right calendar is for your end date.)
3. At the bottom of the Reports screen, type the Phone Number you wish to search for in the 'Find Conferences by ANI' input box. A Phone Number in this case is basically the Caller ID of someone that joins your conference.
4. Once you've typed in your Phone Number click the 'Find' button to the right of the input box.
5. If the Phone Number you entered in Step 2 is the phone number of someone who has been using your codes you will be brought to the **Summary by Conference Report** where you can view a list of conferences with that Phone Number. Once there you can click on each Conference ID link to be taken to the **Conference Detail Report** for that conference. If no conferences exist for the phone number you entered during your selected time interval or if you miskeyed your entry you will be taken to a blank Reports Result Screen with the message "No data available for selected time interval". If this happens you can return to the Reports Search Screen and search again by following step 1 of this tutorial.



Conf ID	Company Name	Contact Name	Conf Start	# Legs	Mins	Cost	USF	RRF	Total $
3091042	LexCorp	Customer Login Test-1	4/9/2010 3:35 PM	1	2	$0.0002	$0.0000	$0.0000	$0.0002
3433154	LexCorp	John Doe	7/12/2010 10:37 AM	4	18	$1.4220	$0.1934	$0.0852	$1.7006
3433155	LexCorp	Jane Doe	7/12/2010 10:43 AM	3	11	$0.8690	$0.1182	$0.0522	$1.0394
3433257	LexCorp	Fred Smith	7/12/2010 10:49 AM	3	17	$1.3430	$0.1827	$0.0805	$1.6062
3433155	LexCorp	Jane Doe	7/12/2010 10:43 AM	3	11	$0.8690	$0.1182	$0.0522	$1.0394
3433257	LexCorp	Fred Smith	7/12/2010 10:49 AM	3	17	$1.3430	$0.1827	$0.0805	$1.6062

Figure 5-8 Search for Conferences by Date Ranges without Filters

To search for conferences within a specific date range and generate a **Summary by Account Report** follow the steps below:

1	Navigate to the Reports section of MYC by clicking the Reports menu on the top far left of the Navigation Bar.
2	Use the calendars to choose the conference dates to generate a report for the conferences that fall into the date range you're looking for. Any conferences not within the date range you choose here will be excluded from the report. (**Important Note:** The left calendar is for your start date and the right calendar is for your end date.)
3	Make sure the Filter Checkbox is unchecked. When the filter box is unchecked the Filters will be removed from the screen.
4	Click the 'View Call Records' button to generate the report.
5	If conferences exists for the date ranges you entered in step 2 you will be brought to the **Summary by Account Report** where you can view a list of accounts that have conferences for those dates (if you only have one account there will only be one account). Once there you can click on each Account link to be taken to the **Summary by Conference Report** for that conference where you will see results relevant to your original search for. If no conferences exist for the selected time interval you will be taken to an empty Reports Result Screen with the message "No data available for selected time interval". If this happens you can return to the Reports Search Screen and search again by following step 1 of this tutorial.

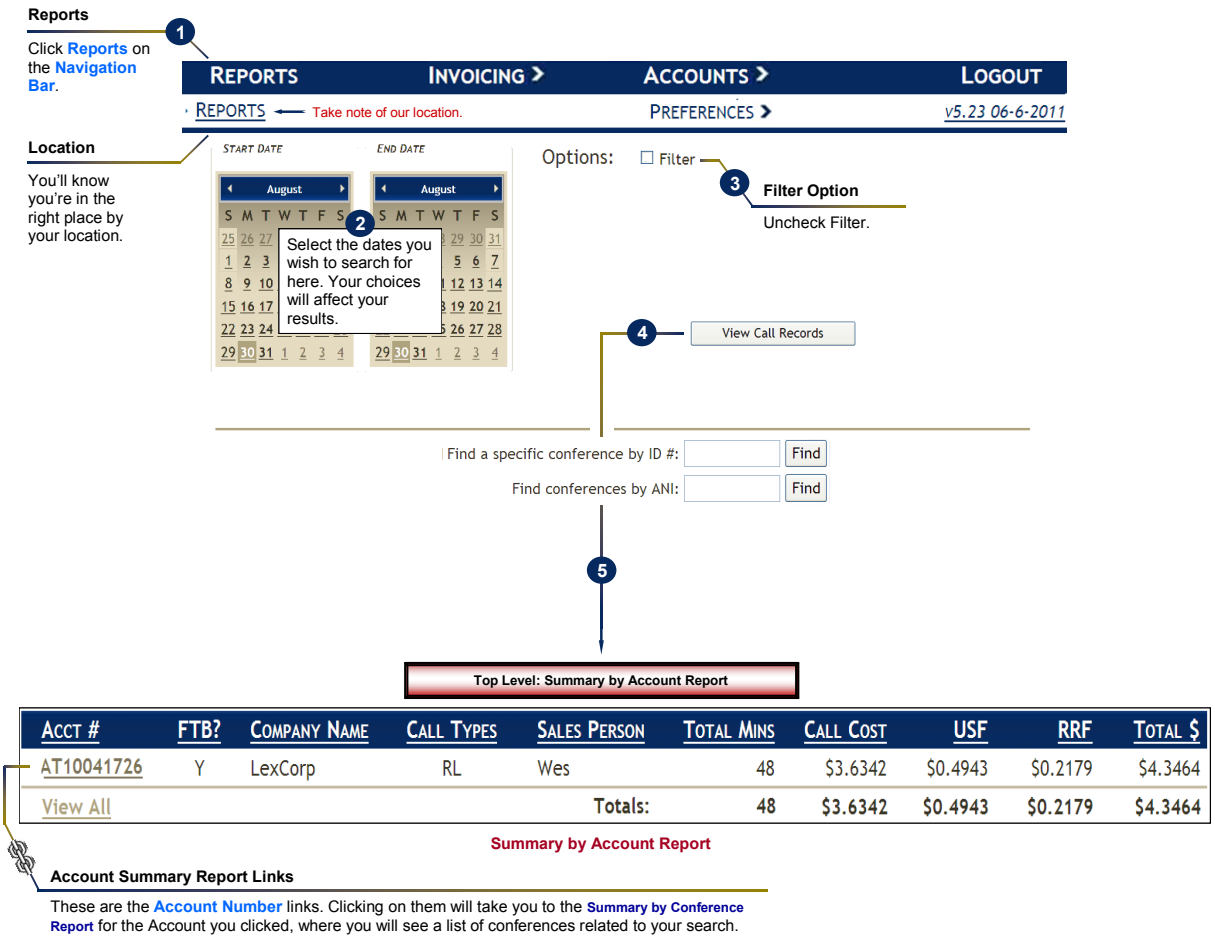
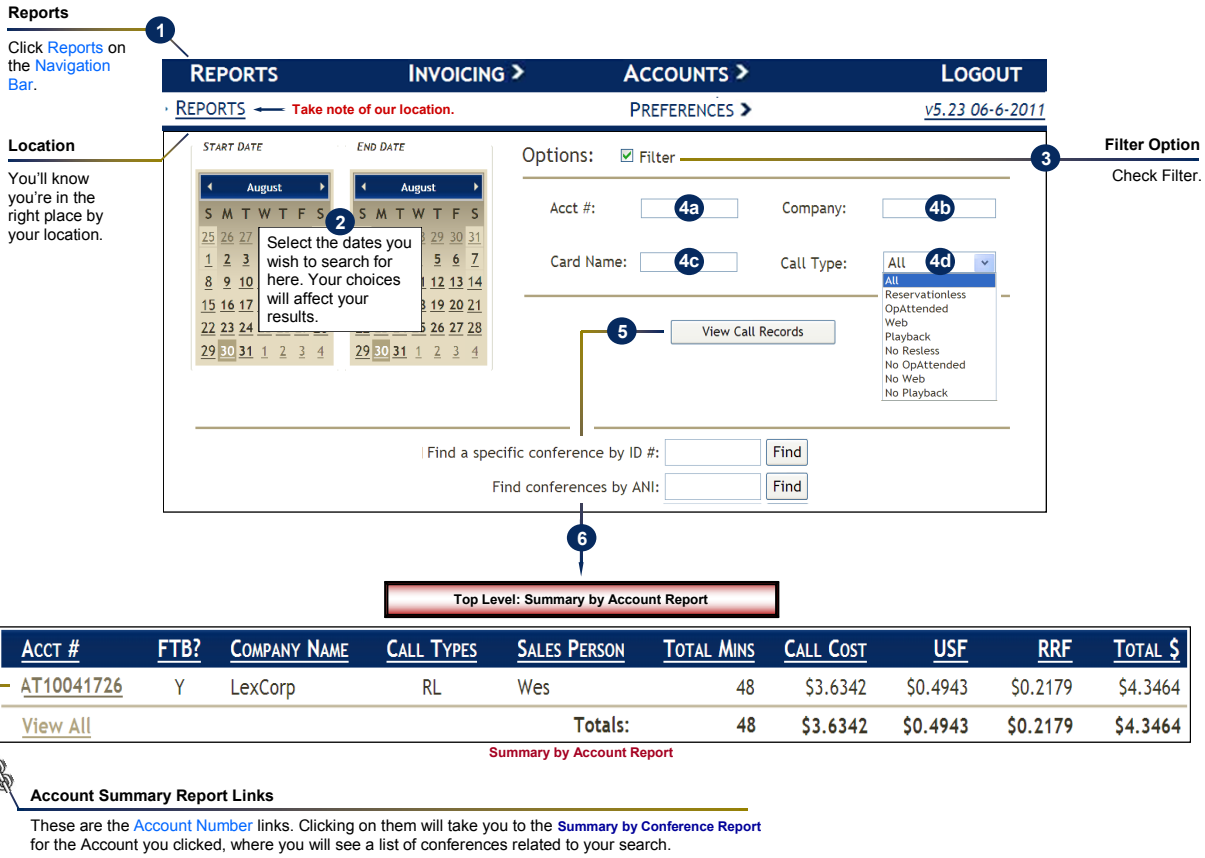


Figure 5-9 Search for Conferences by Date Ranges with Filters

To search for conferences within a specific date range with filters applied follow the steps below:

1. Navigate to the Reports section of MYC by clicking the Reports menu on the top far left of the Navigation Bar.
2. Use the calendars to choose the conference dates to generate a report for the conferences that fall into the date range you're looking for. Any conferences not within the date range you choose here will be excluded from the report.
3. Make sure the Filter Checkbox is checked. When checked the Filters will be added to the screen.
4. Select your filters.
   - a. **Account**: If you have more than one account you can filter your reports to include only a specific account.
   - b. **Company**: Similar to the Account option above, you can filter your reports by a company name
   - c. **Card Name**: Your Card Names are the names of your users, and you can filter reports based on them.
   - d. **Call Type**: Your conferences can be one of various types. Conference types include:
     - i. **Reservationless**: These are OnDemand calls with no operator assistance.
     - ii. **Op Attended**: As the name suggests, these calls include the assistance of an operator.
     - iii. **Web**: These are calls that include web functionality such as Intelipoint.
     - iv. **Playback**: When you listen to a recording through the system a playback conference is created.
5. Click the 'View Call Records' button to generate report.
6. If conferences exists for the date ranges and filters you entered in steps 2 and 3 you will be brought to the **Summary by Account Report** where you can view a list of accounts that have conferences for those dates (if you only have one account there will only be one account). Once there you can click on each Account Number link to be taken to the **Conference Summary Report** for that conference where you will see results relevant to your original search for that Account. If no conferences exist for the selected time interval and filters you will be taken to an empty reports screen with the message "No data available for selected time interval". If this happens you can return to the Reports Search Screen and search again by following step 1 of this tutorial.



6-0 INVOICES

ManageYourConferencing provides the functionality to view, filter, pay, and copy your invoice history to Excel. Here's how:

1. Navigate to the Invoicing section of MYC by clicking the second from the left Invoice menu on the Navigation Bar.

2. **Filter Invoices:** After completing step 1 you will be brought to the Invoice Screen. By default, all of your invoices will be displayed in the invoice list. If you wish to filter this list you can do so by using the following filters at the top of the page:

   a. **Acct #:** If you have more than one account you can filter your invoices to include only a specific account by typing it here.
   b. **Company Name:** Similar to the Account option above, you can filter your reports by a company name.
   c. **Reference Number:** The reference number is your invoice number which you can find on the front page of your invoice. To search for a specific invoice, type your invoice number here and click search.
   d. **Amount Due Between:** This lets you filter your invoices by a range of amount due amounts—your Amount Due is represented in the Invoice Total column and is the amount you billed for the month not including any past due amounts you may have. For instance, if you wanted to see a list of all your invoices that were a hundred dollars or less you would put 0 (zero) in the left box and 100 in the right and click search. If you wanted to search for a specific amount instead of a range you can do that as well by typing the same amount into both amount boxes and clicking search. Use the left input box for the lower amount of the range you want to search for with the right box as the higher.
   e. **Invoice Total Between:** Much like the Amount Due between option above, this options lets you search for ranges of Invoice Total amounts—the Invoice Total includes all of your charges for the month including past due charges.
   f. **Invoice/Statement Date:** Using this option you can search for an invoice date to locate an invoice. The invoice date is always the last day of the month so for instance, if you wanted to search for your December, 2009 invoice you would type 12-31/2009 in the input box and click search.
   g. **Show Conferences:** Checking the Show Conference option box will cause a Conference column to appear in the invoice list where you can see a breakdown of the types of conferences and how many of each you used during the course of the billing cycle.
   h. **Show Minutes:** Checking the Show Minutes option box will cause a Minutes column to appear in the invoice list where you can see a breakdown of your minutes over the course of the billing cycle.

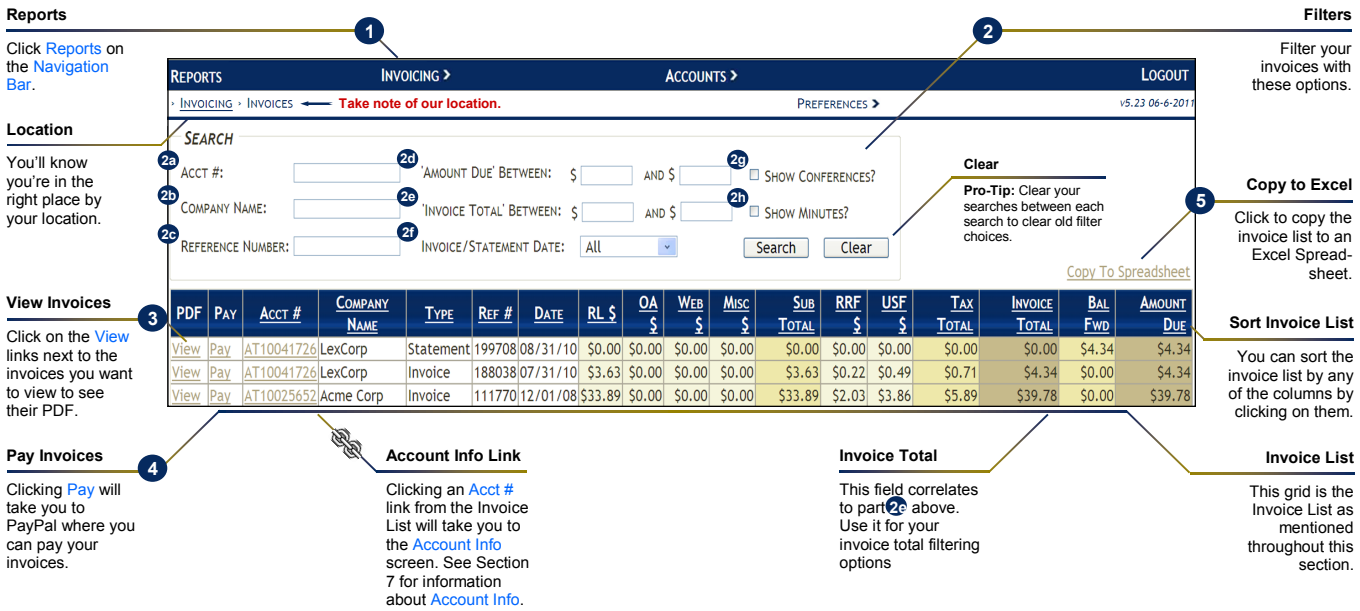
   Pro-Tip: Be sure to click the Clear button each time you want to start a new search, but before you choose your filters. This will ensure none of your old filter choices affect the new search.

3. **View Invoices:** If you want to view an Adobe PDF of your invoices you can do so by clicking the View link next to each one in the Invoice List. Doing so will open the invoice on your screen in your PDF viewer where you can view it.

4. **Pay Invoices:** If you wish to pay your invoices you can do so using the Pay link in the Invoice List. Doing so will take you to the PayPal website where you can make payments. **Important Note:** If you do not have a Paypal account you will need to sign up for one to use this option.

5. **Copy Invoice List to Excel:** To export your invoice list to Excel, click the Copy To Invoice link on the right side and above the invoice list. Once you click you will get a dialog-box asking if you want to save the file or open it. Choose either option. Once you open the file you will be asked if you "...want to open the file now". Clicking yes will allow you to view your invoices in Excel form.

Figure 6-1 Invoice Screen

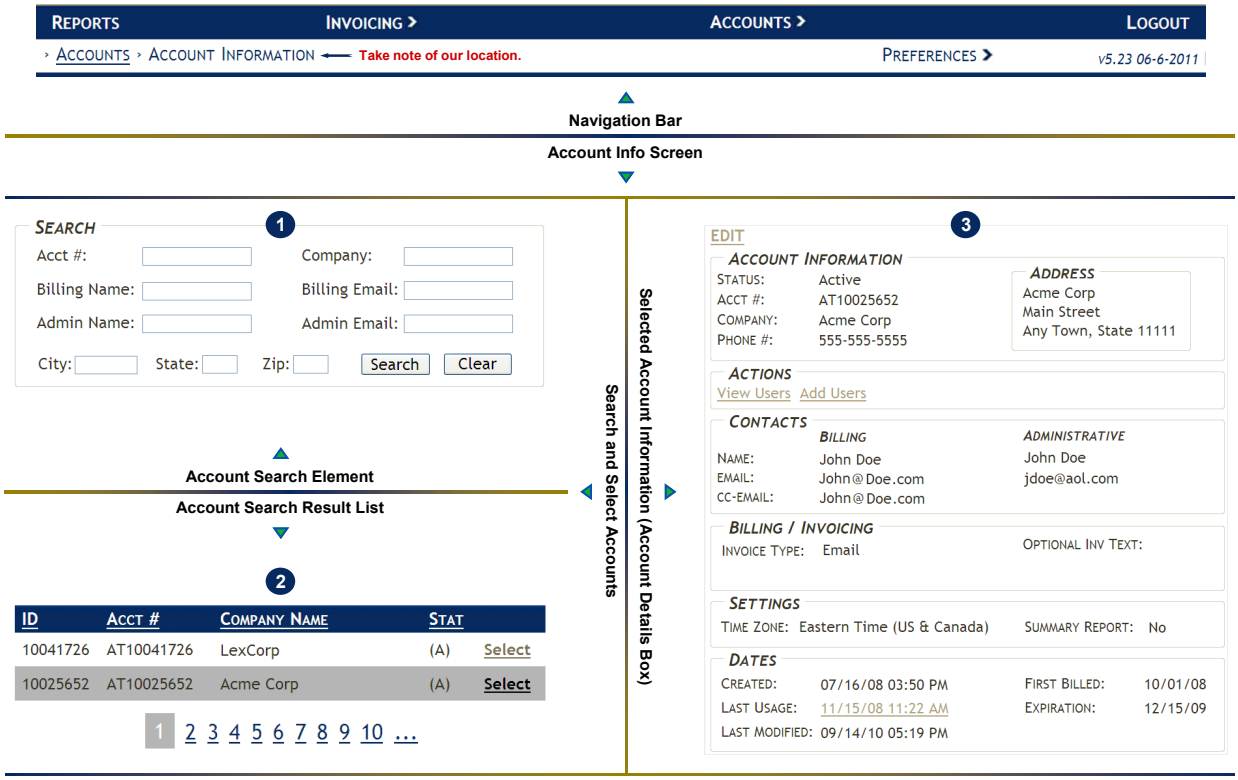


7-0 ACCOUNTS

You can have as many accounts as you need and ManageYourConferencing provides you with the functionality to manage them. Having multiple accounts can be very useful for conglomerates, enterprises, or specialized billing purposes. To get started, navigate to the Account Info page by hovering your mouse over the Accounts menu in the Navigation Bar at the top of the screen and clicking on the Account Info submenu. The Account Info screen consists of the following zones:

1	**Account Search:** The Account Search element is located on the top left side of the Account Info screen, just underneath the Navigation Bar. Using the Account Search functionality you can search and filter your accounts using a number of different parameters. When you search for an account your search result will appear just underneath the Account Search element in the Account Search Result List. When you enter the Account Info screen all of your accounts will be listed in the Account Search Result List by default, so searching for them is usually unnecessary unless you have a large number of accounts and need to filter them. **Pro-Tip:** Most organizations only have one account, so searching or filtering them is generally be needed.
2	**Account Search Result List:** Just underneath the Account Search element is the Account Search Result List. By default, this list will be populated with all of your accounts. If you wish to filter them you can do so by using the Account Search functionality just above the Result List outlined in step 1. In addition to listing your accounts, the Account Search Result List is also used to select specific accounts so you can view and edit their information. To select an account click the '**Select**' link located on the right column of this list. When you do so the Account View/Edit Element (Account Info Box) located on the right side of the Account Info screen will be populated with the account information you just selected allowing you to view the account information and edit the details. When an account is selected the list item for that account in the Account Search Result List will be a darker color than normal to indicate the selection. The fist account listed at the top of the Result List is selected by default when you enter the Account Info Screen. Just below the Account Search Result List you may find some page numbers which you can use to browse through your account list. These numbers will only appear if you have more than 8 accounts.
3	**Account View/Edit Element (Account Details Box):** To the right of the Account Search and Account Search Result elements is the Account View/Edit Element. This box contains all the details for the currently selected account. You can use this Element to Add Users by clicking the '**Add Users**' link or to edit your account information by clicking the **'Edit'** link. This box is covered in Section 7-2, and adding users is covered in Section 9.

Figure 7-1 Account Info Screen Breakdown



7-1 Search For and View Account Details

Once you've familiarized yourself with the layout of the Account Info Screen in section 7.0, you are now prepared to search for and view your account details. You can do so by following these steps:

1 **Search for Your Account(s):** At the top left of the Account screen you will find the Account Search box. Using this box, you can filter your accounts by using the following fields and clicking search (**Note:** if you only have one account or the account you're looking for is already in the list located below the search fields, you can skip this step and go to the next one):

- **a** **Acct # or Company:** Search by your unique account Id or company name.
- **b** **Billing Name or Billing Email:** Search by your billing contact or their email address.
- **c** **Admin Name or Admin Email:** Search by the name or email of the person in charge of your account.
- **d** **City, State or Zip:** Search for accounts by their address.
- **e** **Click Search:** Click the Search button to select your account (or Clear the search fields outlined above and start over).

2 **Select Your Account from the Account Search Result List:** Just underneath the Account Search box outlined in step 1 is the Account Search Result List. By default, this list will be populated with all of your accounts. If you wish to filter them you can do so by using the search functionality outline in the above step.

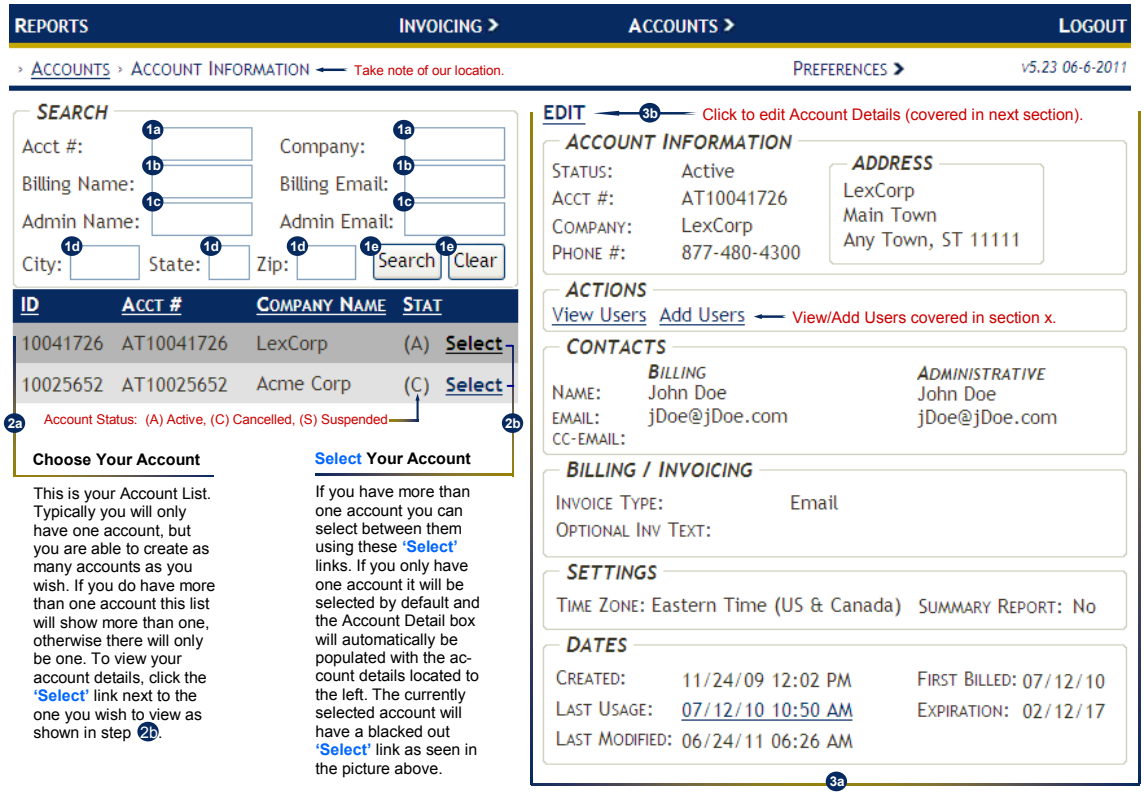
- **a** **Find Desired Account:** Scan the account list and choose the account you wish to view/edit the details of.
- **b** **Select Account:** Find the account you wish to view/edit the details of and click the '**Select**' link located in the far right column.

Once you've found and selected the account you with to view/edit the details of (by following the steps above) take a look at Account Details Box located on the right side of the screen (the Account Details Box is outlined in the next step) and you'll notice that it is now populated with the details of the account you've chosen.

3 **View Your Account Details:** Once you've filtered and selected your account (as shown in the above steps), you'll now be able to view the details of your selected account and edit them if you wish. To do so:

- **a** **View Account Details:** View your selected account details in the right hand side of the screen.
- **b** **Edit Account Details:** Click the '**Edit**' button located above the account details box. Editing is covered in the next section.

Figure 7-2 Search For Accounts



7-2 Editing Account Details

Now that you've found your accounts and have familiarized yourself with the Accounts screen, you are ready to edit your account details if you wish to do so. Here's how:

1 Above the Account Details box on the right hand side of the screen click the **'Edit'** link.

2 Once you've completed step 1 the Account Details box will switch from 'Read Only' to 'Edit Mode' and editable text boxes will take the place of static text. Account details can now be edited as shown in the image labeled ❷ in the illustration below.

3 Starting from the top left, the Account Detail fields are explained as follows:

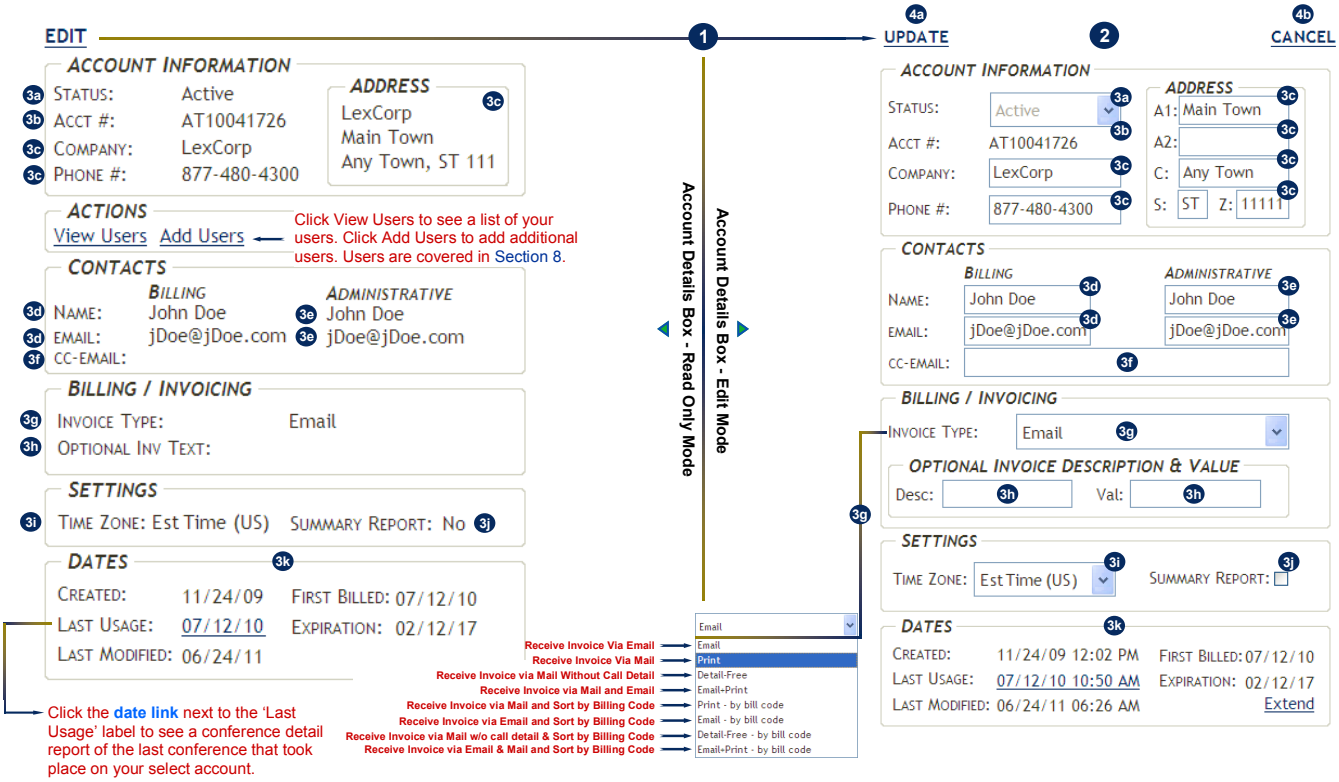
- **a** **Account Status (not editable):** This field displays your current account status. It can be one of three possible values: **'Active'**, **'Suspended'** and **'Cancelled'**. If you account is not active, but should be, please contact your support team.
- **b** **Acct # (not editable):** This field displays the account number for the selected account.
- **c** **Company, Phone, Address (editable):** These control your billing information, you can change them if they are incorrect.
- **d** **Billing Name and Email (editable):** These control the billing contact on your account and who receives your invoices.
- **e** **Administrative Name and Email (editable):** These control the main contact person on your account.
- **f** **CC-Email (editable):** This field sends an email to the cc-address whenever the billing or admin contacts are sent an email.
- **g** **Invoice Type (editable):** This controls how you receive your invoice at the end of each month.
- **h** **Optional Invoice Description and Value (editable):**
- **i** **Time Zone (editable):** This sets the time zone for location of your account headquarters.
- **j** **Summary Report (editable):**
- **k** **Created, First Billed, Last Usage, Last Modified, Expiration dates (not editable): Created:** date your account was created. **First Billed:** date you first used your account for conferencing. **Last Usage:** displays the date of your last conference call (clicking the date will take you to a **Conference Detail** report of the last conference you had. **Last Modified:** displays the date you last updated your account details. **Expiration:** date your account will expire (change to **'Cancelled'** status) if you do not use it between now and the date displayed (this can be extended manually by clicking the **'Extend'** link).

4 Once you've made changes to the fields outlined in the above step you can choose to save your changes or discard them:

- **a** **To Save Your Changes:** Click the **'Update'** link located above the Account Details box. Doing so will save your changes.
- **b** **To Discard Your Changes:** Click the 'Cancel' link located above the Account Details Box. This will discard your changes.

Once you've chosen to either save your changes (by clicking '**Update**') or discard them (by clicking '**Cancel**') the Account Details box will revert back into Read Only mode. If you want to make further changes from here, simply click the '**Edit**' link again to make additional changes.

Figure 7-3 Editing Account Details



8-0 USERS

In order to use the conferencing services you will need Users. Users are essentially named containers for conference codes and their associated billing codes and conference settings. You can have as many users (sets of codes) as you need, and MYC provides you with the functionality to manage them. Having multiple users can be very useful for billing purposes—for instance, if everyone in your organization has their own user, you can view reports and invoices tailored to specifically to them and their usage. To get started, navigate to the User Info screen by hovering your mouse over the Accounts menu in the Navigation Bar at the top of the screen and clicking on the User Info submenu. The User Info screen consists of the following zones:

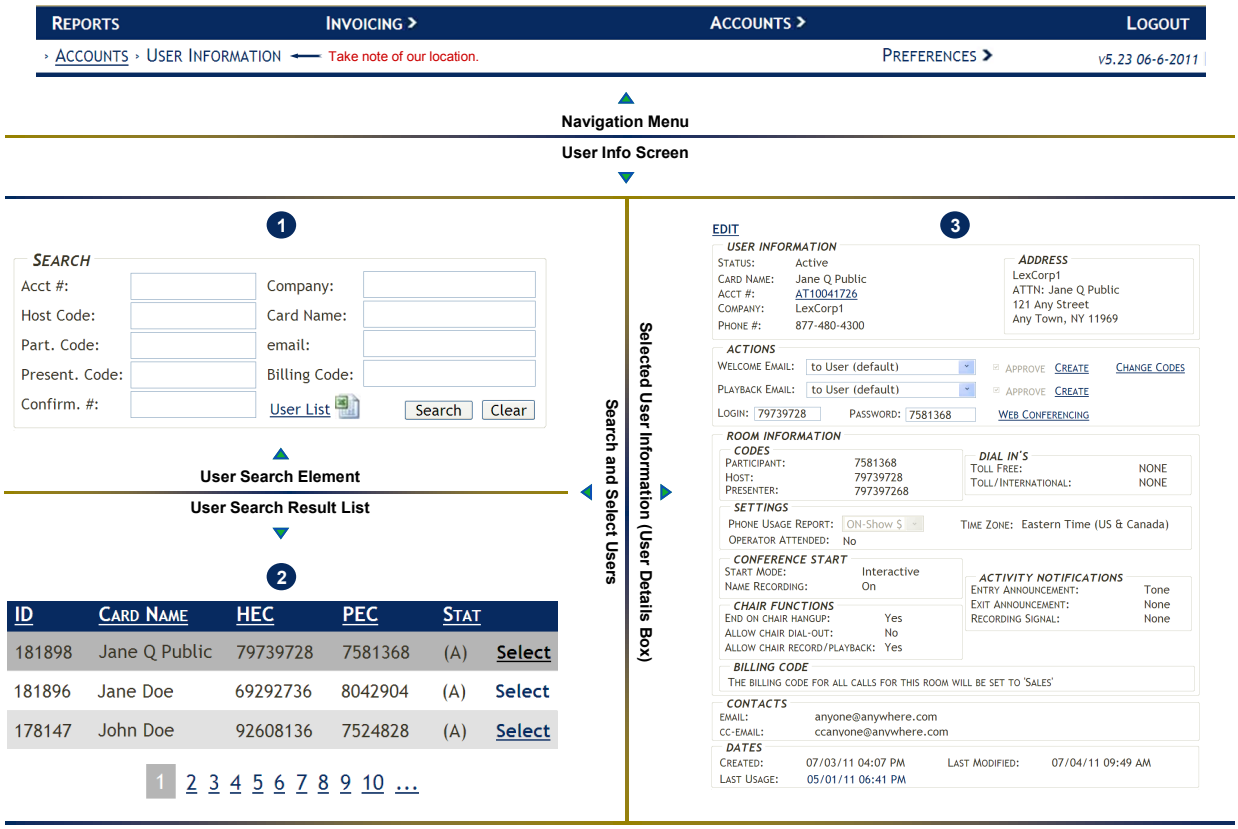
1. **User Search:** The User Search element is located on the top left side of the User Info screen, just underneath the Navigation Bar. Using the User Search functionality you can search for and filter your users using a number of different parameters. When you search for a user your search result will appear in list form just underneath the User Search Element in the User Search Result area. When you enter the User Info screen all of your users will be listed in the User Search Results by default, so searching for them is usually unnecessary unless you have a large number of users and need to filter them.

2. **User Search Result List:** Just underneath the User Search Element outlined above is the User Search Result List. By default, this list will be populated with all of your users. If you wish to filter them you can do so by using the search functionality outlined above. In addition to listing your users, the User Search Result List is also used to select specific users so you can view and edit their information. To select a user click the **'Select'** link located on the right hand column of the User Search Result List. When you do so the User View/Edit Element (User Details Box) located on the right side of the User Info screen will be populated with the user information of the user you just selected allowing you to view and edit the details.

   When an user is selected the list item for that user in the User Search Result List will be a darker color than normal to indicate the selection. The user listed at the top of the User Result Box is selected by default when you enter the User Info Screen.

3. **User View/Edit Element (User Details Box):** To the right of the User Search and User Search Result List is the User View/Edit Element (User Details Box). This box contains all the details for the currently selected user. You can use this box to edit your user information by clicking the **'Edit'** button. Editing users is detailed in Section 8-3.

Figure 8-1 User Info Screen Breakdown



8-1 Search For and View User Settings

Once you've familiarized yourself with the layout of the User Info Screen outlined in Section 8.0, you are now prepared to search for and view your user details. You can do so by following these steps:

1 **Search for Your User(s):** At the top left of the User Info screen you will find the User Search box. Using this box, you can filter your users by using the following fields and clicking search (**Note:** if the user you're looking for is already in the list located below the search fields, you can skip this step and go to the next one):

- **a** **Acct # or Company:** Search for users that belong to a specific acct or company name (use this if you have more than 1 acct).
- **b** **Host, Participant or Presenter Code:** Search for users by their specific host, participant or presenter codes.
- **c** **Card Name or Email:** Search for users by their name or email address. (Card Names are covered in Section 8-4.)
- **d** **Billing Code or Confirmation #:** Search for users by their billing codes or confirmation numbers.
- **e** **Click Search:** Click the **Search** button to select your account (or clear them by clicking **Clear** to start a fresh search).

2 **Select Your User from the User Search Result List:** Just underneath the User Search box outlined in step 1 is the User Search Result List. By default, this list will be populated with all of your users. If you wish to filter them you can do so by using the search functionality outline in the above step.

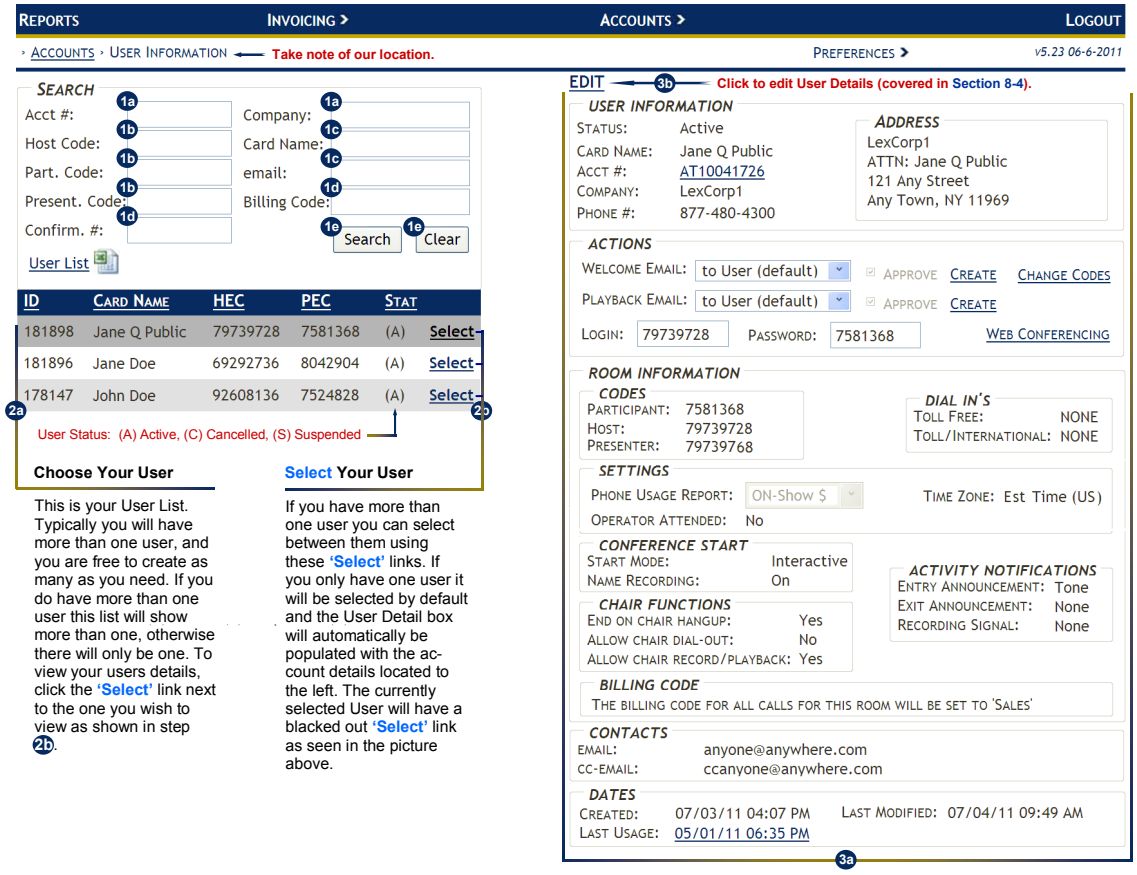
- **a** **Find Desired User:** Scan the user list and choose the user you wish to view/edit the details of.
- **b** **Select User:** Find the user you wish to view/edit the details of and click the **'Select'** link located in the far right column.

Once you've found and selected the user you with to view/edit the details of (by following the steps above) take a look at User Details box located on the right side of the screen (the User Details box is outlined in the next step) and you'll notice that it is now populated with the details of the user you've chosen.

3 **View Your User Details:** Once you've filtered and selected your user (as shown in the above steps), you'll now be able to view the details of your selected user and edit them if you wish. To do so:

- **a** **View User Details:** View your selected account details in the right hand side of the screen.
- **b** **Edit User Details:** Click the **'Edit'** button located above the user details box. Editing user settings is covered in Section 8-4.

Figure 8-2 Search For Users



8-2 User Roles

8-2 User Roles

Now that you've found your users and have familiarized yourself with the Users screen, you are now ready to edit your user details if you wish to do so. Before we do that however, you should familiarize yourself with conferee **Roles**. As you know, conferencing allows you to hold a telephone call with a virtually unlimited number of participants, but not all of these participants are created equal. Some will have more control over the flow of the conference than others and this difference is linked directly to and determined by their **Role**. When you create users you will receive between 2 and 3 conference codes that will allow you to login to the conference. Your **Role** in a conference is dependent on which of these code you use to login when you dial into the call. So for instance, if you log into the conference using host/moderator code, you will be a host/moderator in the call, and will have all the host/moderator functionality available to you. There are three Roles in total and they are defined as follows:

Figure 8-3 User Roles and their Associated Conference Touch Tone Functions

Moderator/Host Role (Common): This elevated role uses the Host Code and is generally used by the owner of the user or the speaker in the conference call. Using this role will allow the host to control the conference with commands entered into a touch-tone phone. Host/Moderator commands include:

***0**—Entering *0 toggles Request for Operator Assistance - use this if you need an operator to assist you.
***5**—Toggles Conference Lock - Secures the conference and prevents operators and other callers from joining.
***6**—Toggles Self-Mute - Mutes your line only.
***7**—Toggles Conference Mute - Puts conference in Presentation mode which mutes all lines except for host and presenter roles. **Note:** This exception is the only benefit of choosing the presenter role outline below.
#1—Roll Call: Plays a list of all the callers to the moderator, Name Recording must be enabled to activate this feature (see Section 8.4).
#2—Participant Count - Tells host/moderator how many participants are currently in the conference.
#3—Access Dial Out Vestibule - Allows the Host/Moderator dial-out to participants, please to contact your conference provider to activate this feature.
#7—Toggle Record - Turns the conference recording on and off, recording must be enabled for this feature to work (see Section 8.4).
99—End Conference - Disconnects everyone from the conference and closes the call, proceed with **caution**.

As you can see, using a host code to access the host role can grant some very useful privileges so it is important to only give host codes to the participants who you want to control the conference.

Presenter Role (Not Common): This role is a small step above the Participant/Guest role outlined below, and uses the Presenter Code. The only thing that differentiates this role from a Participant/Guest role is that a guest logged in as a Presenter will not be muted when a Host puts the conference into presentation mode by pressing *7 on their phone. This role is limited in scope and is only necessary for specific instances in which you don't want to give a guest your host code but want them to always be able to speak when your other guests cannot (speaker). This can be valuable for presentations. Presenters have the following limited key commands at their disposal:

***0**—Toggles Request for Operator Assistance
***6**—Toggle Self-Mute - Mutes your line only.

Pro-Tip: If you receive this code when setting up a new user but do not need it, just discard it.

Participant/Guest Role (Common): This role uses the Participant Code and is generally given by the user to guests who the user wants to join the conference. The Participant role has the following key commands at their disposal:

***0**—Toggles Request for Operator Assistance
***6**—Toggle Self-Mute - Mutes your line only.

As you can see, participant/guest roles have virtually no control over your conference and as a result, most of the people you invite to join the conference call should receive a participant code instead of a host code.

In addition to granting privileges, roles can also play an important part in determining the way in which a conference flows as participants join the call. Depending on how you setup your user, you can create conference flows in which guests are not allowed to speak with each other until the conference begins (this can be a useful way to moderate the call) and more. These settings and others are discussed in the next section titled '8-4 Editing Your User Settings'.

8-3 User Actions

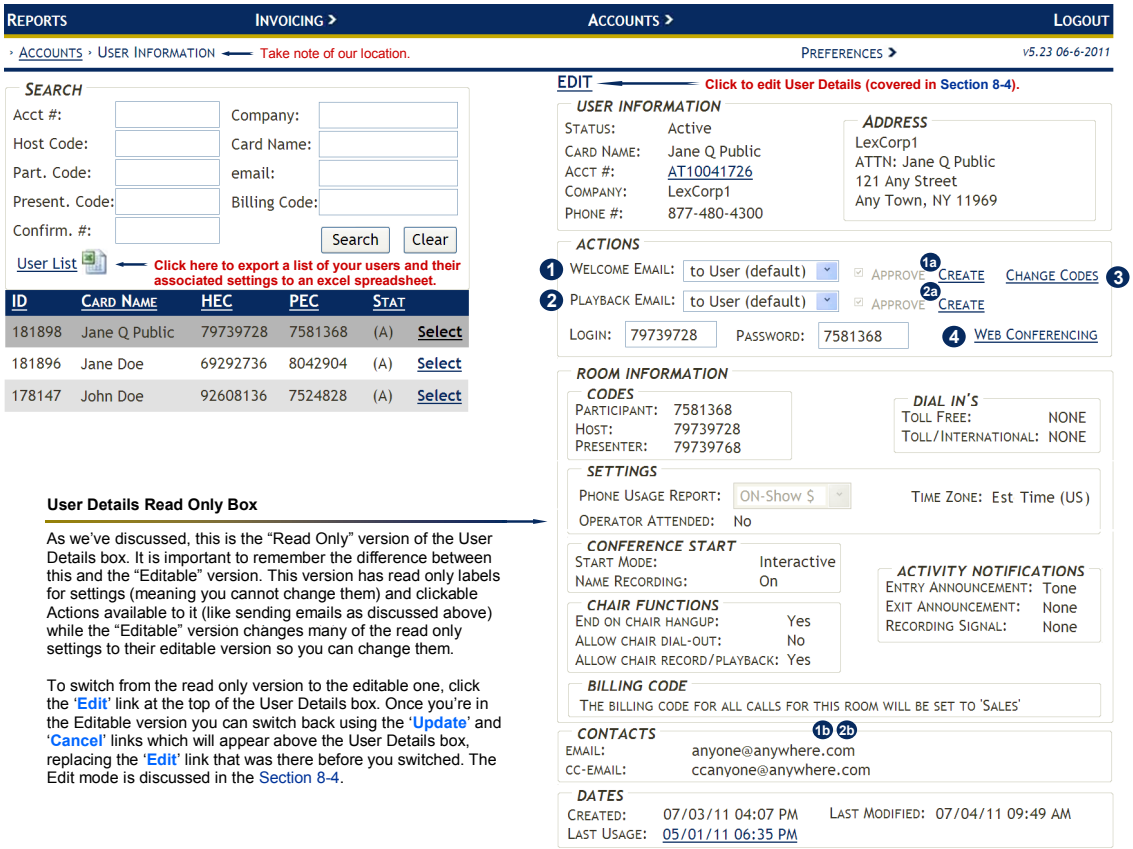
Now that you've familiarized yourself with Users, **Roles**, and the User Info screen, let's talk about User actions and settings. As mentioned previously, Users are basically named containers for conference codes and settings, and how you configure these settings can have a major impact on your conference. From enabling recordings, requesting operator assistance, enabling the ability for the moderator to dial out to others, determining whether participants can speak with each other without a host present, sending user informational emails, changing your codes and many more, Users have powerful options available to them. While some require you to contact your conference provider to enable (dial outs, operator assistance), many you can configure yourself at ManageYourConferencing.com.

8-3 User Actions (Continued)

To get started, lets take a look at your available User Actions in the User Details Read Only box on the User Info page. To get to the User Info page, hover your mouse over the 'Accounts' menu in the Navigation Bar at the top of the screen and click on the 'User Info' submenu (you can also get here by clicking the '**View Users**' link in the read only version of the Account Details box in the Account Info page). The read only version of the User Details box will display the following actions:

1	**Welcome Email**: A welcome email is an email that contains a listing of your user settings and instructions on how to join a conference call. Once you've setup a new user or have made a change to and existing one, you can click the '**Create**' link next to the Welcome Email label and the website will send an instructional welcome email to either of the email address displayed in the 'Contacts' section of the User Details box—marked 1a below— depending on which option you choose in the Welcome Email drop down box—marked 1b.
2	**Playback Email**: A playback email is an email that contains instructions on how to listen to a previously recorded conference call, but only if your user has been setup for this functionality. If this is the case, you can click the '**Create**' link next to the Playback Email label and the website will send an instructional playback email to either of the email address displayed in the 'Contacts' section of the User Details box—marked 2a below— depending on which option you choose in the Playback Email drop down box—marked 2b.
3	**Change Codes**: If your codes get compromised or you need to change them because of changes in your organization or affiliates, you may do so by clicking the '**Change Codes**' link. This will instantly update your codes to a new set and your old codes will no longer work. This can be very useful to prevent fraud or manage who has access to a users' conference codes.
4	**Web Conferencing**: If you have Web Conferencing enabled on a specific user, you can automatically login to a web session by clicking the '**Web Conferencing**' link. Doing so will open a browser window and automatically load your web conference. For more information on this feature, please contact your conference provider.

Figure 8-4 Explore Your Available User Actions



User Details Read Only Box

As we've discussed, this is the "Read Only" version of the User Details box. It is important to remember the difference between this and the "Editable" version. This version has read only labels for settings (meaning you cannot change them) and clickable Actions available to it (like sending emails as discussed above) while the "Editable" version changes many of the read only settings to their editable version so you can change them.

To switch from the read only version to the editable one, click the '**Edit**' link at the top of the User Details box. Once you're in the Editable version you can switch back using the '**Update**' and '**Cancel**' links which will appear above the User Details box, replacing the '**Edit**' link that was there before you switched. The Edit mode is discussed in the Section 8-4.

8-4 EDITING YOUR USER SETTINGS

Now that we've discussed your user actions, it's time to dive into your user settings and details and how you can go about editing them. To learn more, follow the steps outlined below (**Note:** these settings correspond to Figure 8-5):

1. Above the User Details box on the right hand side of the screen click the **'Edit'** link.

2. Once you've completed step 1 the User Details box will switch from 'Read Only' to 'Edit Mode' and editable text boxes, check-boxes, and drop downs will take the place of static text. User details can now be edited as shown in the image labeled ❷ in Figure 8-5. If you wish to make changes to your user settings you may do so by using the guide in the next step.

3. Starting from the top left of the editable User Details box, the User Detail settings are explained as follows:

   a. **User Status:** This setting displays your current user status. It can be one of three possible values:

      Active: Your user is active and the conference codes assigned to it are ready for use.

      Suspended: Your user is not active, and the codes assigned to it are not available for use. This can occur if your account is past due, if you requested the room be suspended or if you suspended it yourself via this site. **Note:** You can set your own users to the suspended status and should do so if any of your users are no longer with your organization or if their codes have been compromised. This will help protect against fraud.

      Cancelled: Your user is not active and the codes assigned to it are not available. This can occur when your account is cancelled or has expired (this can happen after extended periods of non-use). If your user is cancelled by mistake, you can contact your conference provider to reinstate it.

   b. **Card Name:** This displays the user name for the selected user. This can be changed if you want to assign the code elsewhere. This field can also be useful invoicing and reporting if you wish to group usage together by this field.

   c. **Phone & Address:** These control your users location information, you can change them if they are incorrect.

   d. **Phone Usage Report:** If enabled, the Phone Usage Report option will email a conference usage report after each conference to the addresses outlined in section. The report will contain information on who joined the conference (including caller ID information) and how long they stayed online. This is an extremely valuable option that is definitely worth trying out (you can disable it at anytime). The Phone Usage Report comes in the following three flavors:

      On-Show $: Choose this option to include a breakdown of costs (minute fees/taxes/totals) with your report.

      On-Hide $: Choose this option to receive the report without a cost breakdown (report will still include caller ID and minutes used per caller).

      Off: Choose this option to disable the Phone Usage Report.

   e. **Operator Attended (not editable):** This will display whether your user is setup to receive operator assistance while in conference. This can be useful for dial outs in which you want the operator to connect your parties or question and answer style conferences in which the operator introduces and moderates the proceedings. Ask your conference provider for more details.

   f. **Time Zone:** This specifies the time zone for a particular user. Note that this can be different from you account time zone.

   g. **Start Mode:** This option controls the way your conference operates as your participants join the call (note that this setting can be dependent on a participants' role as discussed in Section 8-2). For instance, some organizations prefer a moderator or host to be present before their participants or guests can speak to each other in a conference. In this case, the participants or guests will be holding to music—unable to hear or speak to one another—until the host or moderator arrives. This can be useful to prevent unauthorized access in the event your participants or guests want to hold a conference on your organization's dime without a host or moderators permission. Other organizations may feel differently and may decide it's too inconvenient or costly for participants or guests to have to wait for a moderator or host to join a call before they can hold a meeting (you will be billed for this hold time), and in this event might choose the Interactive option to allow all parties to speak freely from the moment two or more have joined the conference—regardless of their role. So depending on how decide to manage your conference flows, you will have the following Start Mode options available to you:

      Interactive: When using Interactive Mode all of your participants will be able to speak and hear one another from the moment they join the conference regardless of their role (see Section 8-2 for more information on roles). This can be a useful mode if you want your participants/guests to be able to converse even if a host/moderator has not joined the conference.

      Music-Awaiting-Chair: When using the Music-Awaiting-Chair Mode your guests or participants will not be able to hear or speak to one another—they will be holding to music—until a moderator/host joins the call by dialing in with their host/moderator conference code. So for instance when using this mode, if you give out your participant/guest code to ten people and they all join your conference call ten minutes early, none of them will be able to speak with one another until you or someone with a host/moderator code joins the conference—at which point all of the lines will be open and everyone will be able to speak. This can be useful to prevent your guests from using the participant/guest code you gave them to hold their own meetings without your permission.

      Music-to-Presentation: With this mode all participants/guests (conferees who use the guest/participant code when joining your call) will be holding to music and unable to speak or listen to each other until a host (conferee who uses the host/moderator code when joining the call) joins the conference. At this point all the participants/guests will be taking off hold and placed on mute while any host/moderator/presenter lines will remain open (for more information on Presenter roles see Section 8-2).

      Music-Manual-Control: With this mode, everyone that joins the conference (all roles included) will hold to music until a conference operator opens the call. This setting has extremely rare use cases and should only be chosen in conjunction with a conference operator from your conference provider.

   h. **Name Recording:** As you (as the host/moderator) and your participants/guests join your conference call you can choose to record all names by checking the Name Recording box. Doing so will cause the system to ask everyone to say their names before they are placed in conference, and it will record their response. Once done you can choose to have the system play back their names to the conference as they join the call as outlined in step ❸ of this section. This can be useful for knowing who is joining your conferences. In addition, by enabling this option you (as a host/moderator) will have access to the roll call functionality by pressing #1 on your phone—as shown in Section 8.2—which will allow you to hear a private on-demand roll call of everyone that joined.

3

i **Entry/Exit Announcement:** These settings determine the type of audible notification that is played into the conference while you are in conference when another conferee joins or exits the conference. These can be a useful options for keeping track of when a conferee joins and exits a conference as well as knowing how many conferees are participating in your conference, and can even be configured to play a recording of each caller's name as they join and leave. (**Pro-Tip:** Most users choose to disable the Exit Announcements completely while leaving some sort of entry announcement on.) Your options are:

None: This option disables the audible conferee entry and exit notifications completely and in doing so will prevent any sound from being made when someone joins or leaves your conference. This can be useful to prevent joining or exiting callers from interrupting your meeting but should be used with caution because if this option is selected there will be no way for you to know when someone joins your conference because you will hear nothing. In this case you—as a moderator—will still have the option to press **#2** on your telephone keypad to receive a private participant count—as outlined in Section 8.2—if you need one.

Tone: This option causes the system to play a short beep into the conference whenever a conferee joins or leaves. This is the least intrusive notification option and is most commonly used.

System Message: This option will play a very generic pre-recorded system message each time a new conferee joins or leaves your conference. This option can be fairly intrusive and has no real benefit over the Tone option above, as a result this option is not commonly used.

Personal Message: When used in conjunction with the Name Recording option discussed in step 3h of this section, the Personal Message option will first record a conferees name just before they are placed in your conference then play it back into the conference immediately after they join or leave. This can be a very useful choice for keeping track of who is participating your conference calls, because you will know exactly who is joining and leaving as they join and leave. **Pro-Tip:** In order for this option to work correctly, the Name Recording box—explained in step 3h of this section—must be checked.

j **Recording Signal:** When set to 'None', no sound will be played into the conference when a moderator initiates a recording by pressing **#7** on their telephone keypads. When set to 'Play System Message', the conferencing system will play a generic "Your conference is now recording" message when a moderator or operator initiates a recording of your conference.

k **End on Chair Hang-up:** If this option is checked your conference will end the moment a host/moderator disconnects from it—whether intentionally or unintentionally. This option should be used with extreme caution and is especially sensitive to cell phones with bad reception. An alternative to this setting is to have the host/moderator press **99** on their telephone keypad, as outlined in Section 8-2. Doing so is a manual way to close the conference disconnect all the parties without relying on the unpredictability of this setting.

l **Allow Chair Dial-out (Not Editable):** This controls a host/moderators ability to dial out to participants from within the conference. When this option is enabled, you as a host/moderator will be able to access the dial-out vestibule by pressing **#3** on your telephone keypad where a system assistant will guide you through the process of calling other participants and joining them to your conference. To enable this feature, please contact your conference provider.

m **Allow Chair Record/Playback:** This controls a host/moderators ability to initiate a conference recording. When this option is checked the host/moderator will gain the ability to record a conference currently in progress by pressing **#7** on their telephone keypad (**pro-tip:** once you've started a recording you can stop it at any time by pressing **#7** a second time). If this option is not checked the recording functions will be disabled. In addition, once your recorded call is over you can send yourself a playback email—as outlined in Section 8.2—to receive instructions that will show you how to dial in and listen to your recording. Finally, if you need a copy of your recording please contact your conference provider after the call has completed.

n **Billing Code:** This section controls the billing code that is associated with a particular user. Billing codes are useful for your billing purposes and can determine how your invoice is configured as outlined in part 3g of Figure 7.2 in Section 7.2 ManageYourConferencing offers the following billing code options:

None: If this option is selected a billing code will not be associated with the user.

On the Fly: With this option you—as the host/moderator—will be prompted to enter your bill code each time you dial in to a new conference call. This will associate each conference with it's own unique bill code of your choice. This option can be very useful for cataloging specific conference calls with specific billing codes.

Hard Coded: When this option is selected the text box to the immediate right of the option button will be enabled and you will be able to type in a hard coded billing code which will be applied to every conference call from that point forward. This option is not as dynamic as the 'On the Fly' option above because it is an across the board change for all of your conference calls, however this hard coded billing code can be changed at any time to reflect a new billing code of your choice simply by updating it again here.

Available Values: This drop down box holds a history of your past billing codes across your account. You can select one of those values from the drop down for quick access to your past codes and it will automatically populate the text box to the right of the 'Hard Coded' option with the value you selected. This is just a quick shortcut.

o **Contacts:** Your user contacts control which email addresses receive from your conference provider as well as the emails you create yourself as outlined in Section 8.3. You can update these boxes as necessary and send your Welcome and Playback emails to whomever needs them.

p **Dates:** These are just informational labels which can tell you the date this user was 'Created', the point in time that this user was 'Last Modified' (the last time the user settings were updated), and the date of your 'Last Usage' (the last time a conference was held with one of the user's codes). In addition, you can click in the 'Last Usage' date link to be taken to a Conference Detail Report with will show you all the activity that took place during the last conference.

4

Once you've made changes to the fields outlined in the above step you can choose to save your changes or discard them:

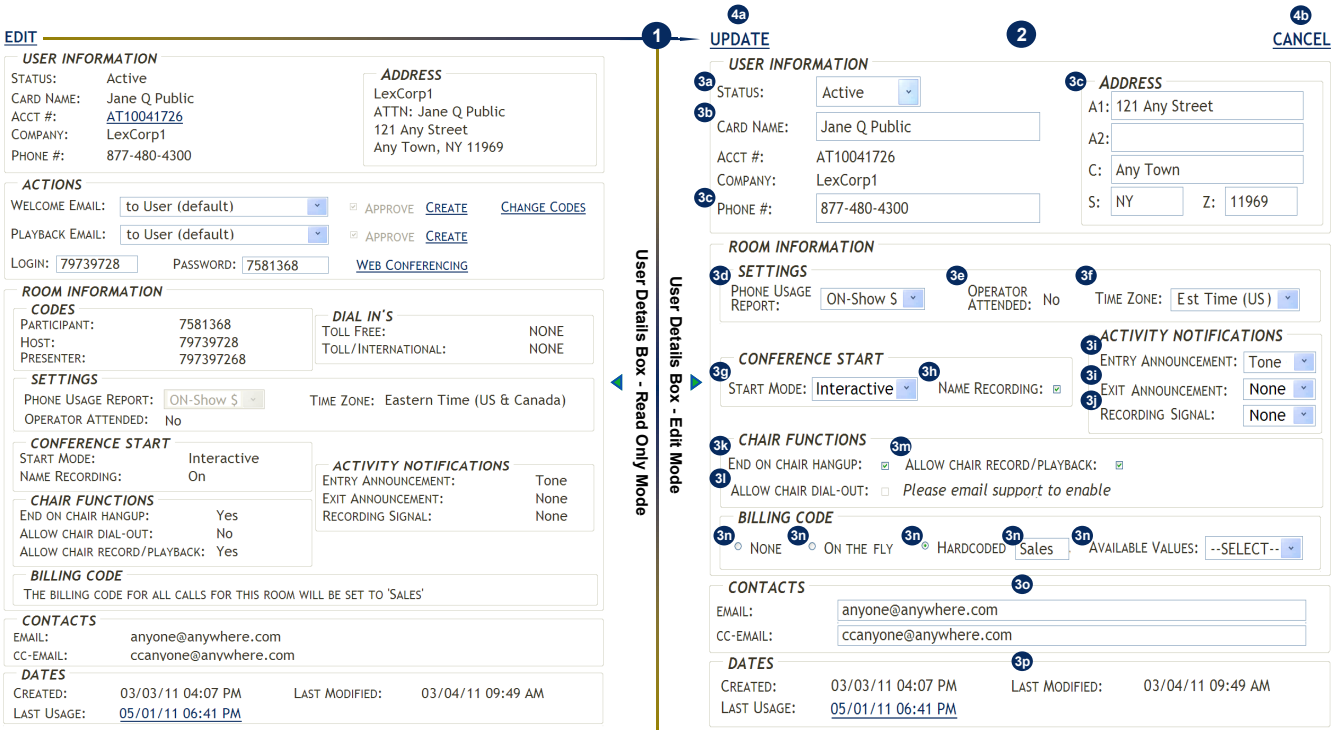
a **To Save Your Changes:** Click the '**Update**' link located above the User Details box. Doing so will save your changes.
b **To Discard Your Changes:** Click the '**Cancel**' link located above the User Details Box. This will discard your changes.

Once you've chosen to either save your changes (by clicking '**Update**') or discard them (by clicking '**Cancel**') the User Details box will revert back into Read Only mode. If you want to make further changes from here, simply click the '**Edit**' link to make additional changes.

8.4 EDITING YOUR USER SETTINGS (CONTINUED)

As you'll notice, there are plenty of options for you to choose from when setting up your conference. To keep track of them all use the previous guide with Figure 8-5.

Figure 8-5 Editing Your User Settings



Users Summary

In summary, users are powerful conferencing tools which control many aspects of your conferencing experience. They include the following:

- Conference codes that allow you to join conferences and control conference Roles which determine who is in charge of a conference call and who has the power to regulate it via telephone commands.
- Conference settings which determine how your call will flow as participants join, whether or not your conference can be recorded, what you will hear (if anything) as callers join your conference etc.
- Dynamic billing options which allow you to stamp a unique billing code on every conference call you make, or keep them all the same across the board for a particular user. These can be very useful options for data tracking. If you would like to learn more, please contact your conference provider.
- Phone Usage Report options which, when enabled, will send you a conference report after each conference call you make. Conference Phone Usage Reports include the following:
    - Caller Id's of the participants who joined your conference
    - Time callers joined and left the conference.
    - Duration of time callers were in the conference.
    - Charge breakdown of each user who joined the conference.
    - Summary of total charges for the entire conference call.

In the next section we will discuss how you can add your own users.

9-0 Adding New Users

Now that you're familiarized yourself with users, lets talk about how you can add them on ManageYourConferencing. To get to the Add New User screen, follow the steps below:

1. Go to the Accounts screen by hovering your mouse cursor over the Accounts menu in the Navigation Bar and clicking on the 'Account Info' option
2. Once you're in the Accounts screen, select the account you want to add a user to from the Account Search Result List (if you only have one account, your account will be selected by default).
3. Once you've selected your account, click the '**Add Users**' link in the Account Details box on the right side of the screen.
4. You are now in the Add New Users screen which is covered in the next section.

Figure 9-1 Navigate to the Account Info Page

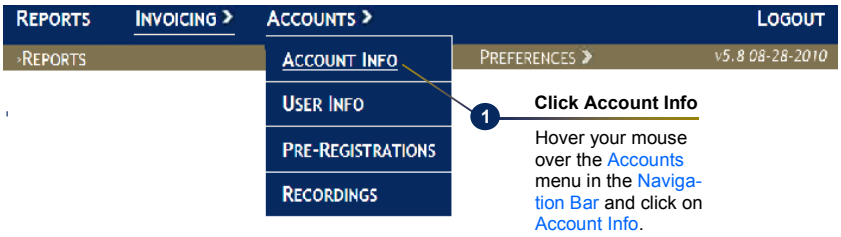


Figure 9-2 Choose the Account You Want to Add a User to and Click Add User

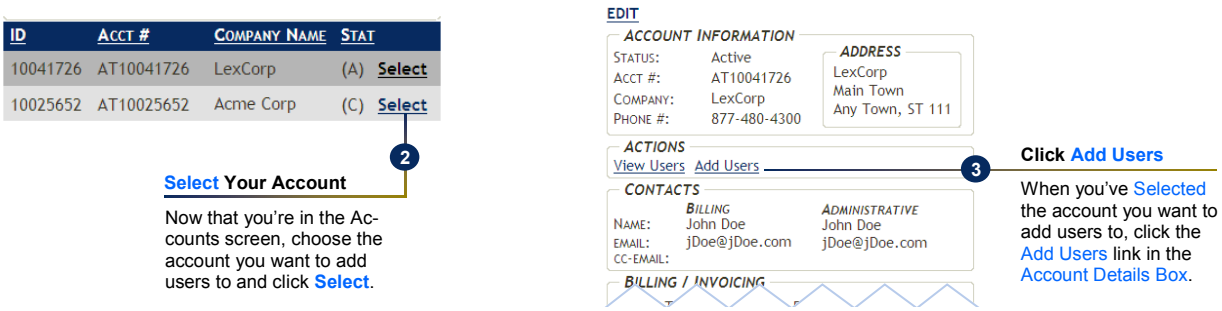
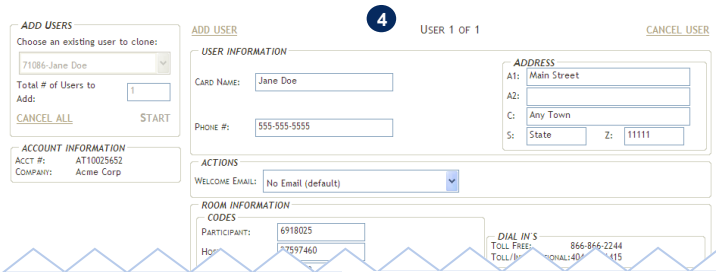


Figure 9-3 Add New Users Screen



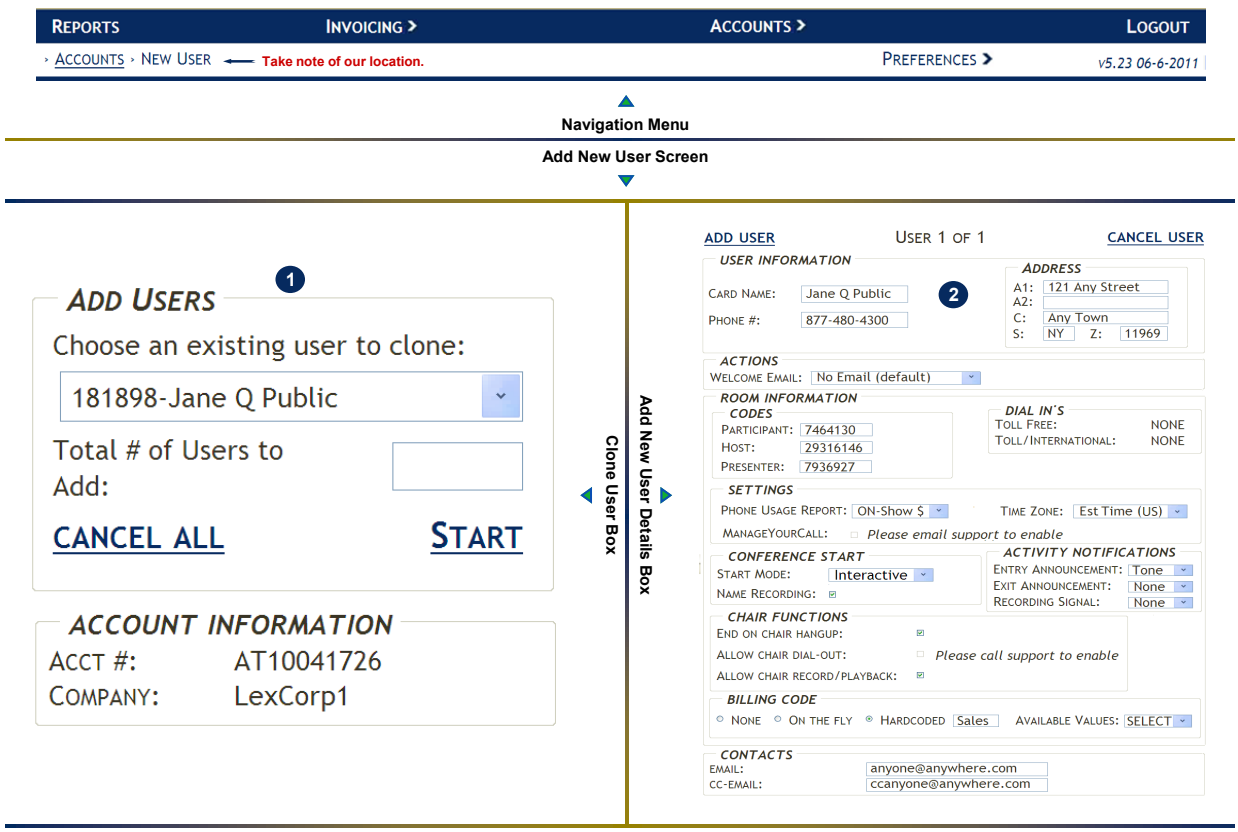
9-1 Add New User Screen Breakdown

9-1 Add New User Screen Breakdown

Now that you've clicked the '**Add Users**' link in the Accounts screen as outlined in the previous section, you will find yourself in the Add New Users Screen, which is broken up into the following zones:

1	**Clone User Box:** On the right hand side of the Add New Users screen you will find the Clone User Box. This box is designed to let you select an existing user and clone it. You can think of user cloning as using one of your existing users as a template for a new users details and conference settings. By cloning a user this way you can save time by having your most commonly used settings already selected, and you won't have to set them all manually. To use this box first select an existing user from the dropdown list, then enter the number of new users you want to create in the 'Total Number of Users to Add' text box. Finally, click the 'Start' link to begin the cloning process.
2	**Add New User Details Box:** To the right of the Cone User Box outlined in step 1, you will find the Add New User Details Box. This is where you will be selecting the new user details and conference settings that you new user or users will be equipped with. Most of these settings are covered in Section 8-4 and Figure 8-5, so please refer back to those sections to learn about these settings. To properly configure your new user, you will need to go through each field in the Add New User Details Box and input the proper setting. In most cases your favorite settings will already be selected because of the Clone User process outlined in step 1, however things like your 'Card Name' or 'Billing Codes' will probably need to be changed so it is more tailored to your new user. So for instance, if you want to add a new user for someone in your organization, you would first clone one of your other users and then input a new name in the 'Card Name' box and a new billing code in the 'Billing Code' box. This way your new user is tailored to the person in your organization that you are creating the new user for. This is just one configuration example, but you are free to create your users however best suits your needs.

Figure 9-4 Add New User Screen Breakdown



9-2 ADDING NEW USERS STEP-BY-STEP

Now that you've clicked the '**Add Users**' link in the Accounts screen as outlined in the previous section, you will find yourself in the Add New Users Screen. Follow the steps below to add a user:

❶ **Choose an existing User to clone:** On the left hand side of the screen in the Clone User box, find the drop down box located below the "Choose an existing user to clone" label, and select an existing user that most closely matches the user you want to create. For example, if you have an existing user that has 'Interactive' as their start mode and 'Tones' for their entry announcements, and you want your new user to have these same settings, choose that user here. If no existing user has settings that match the settings of the user you want to create—that's ok too—just choose any user and change their settings to what you want as detailed below.

❷ **Enter the total number of Users you want to add:** Just below the clone User drop down outlined in step ❶, you will find the "Total # of Users to Add" text box. Enter the number of new Users you want here. So for instance, if you need to create only one user, put the number "1" in the box. If you need more than one, put the number you need there. This allows you to create one or more Users all at once, instead of having to come back to the Add New User page each time you want to add a new one. If you only need one now, but might need more later—that's fine too—you can come back to the Add New User page as often as you like to create more.

❸ **Click START**: Once you've chosen your User to clone from the clone user drop down list as explained in step ❶, and have entered the number of users to add in the "Total # of Users to Add" textbox explained in step ❷, you are now ready to begin the process of configuring each individual User. To begin, click the '**START**' link located just below the "Total #" textbox.

Alternatively, if you've made a mistake or do not need to add new Users after all you can click the '**CANCEL ALL**' link to safely abort the Add New User procedure and return to the Users screen.

❹ **Get to know the Add New Users Details Box**: To the left of the Clone User box from step ❷, is the Add New Users Details Box. If you look closely you might notice that this box closely resembles the User Details Box explained in Section 8-4 and Figure 8-5. This happy similarity is not a coincidence. In fact, everything is so similar because the details and settings in the User Details Box come from what you choose in the here. In other words when you setup a User here, these settings will be reflected later in the User Details Box. This also means that if you make a mistake when setting up your Users here, you can fix that mistake later by going to the Users section of ManageYourConferencing (covered in Section 8) and correcting the error in the User Details Box.'

The Add New User Details Box is where most of the action happens when setting up new Users because this is where you configure each individual User setting. Because the settings here are the same as the settings in the User Details Box, you can always refer back to those sections (Section 8-4 and Figure 8-5) if you need to know what any of them settings are or how they work.

One more notable note, if you look at the top of the 'Add New Users Details Box' in Figure 9-4 you will see the words "User 1 OF 1". This means that for this illustration, only one User has been chosen in the process outlined in step ❷. If you have chosen to add more than one User when setting up your Users, the second number will reflect how many you've chosen to add. So for instance, if you chose to add three new Users, it would say "User 1 OF 3". As you add each User the first number will increment by one for every one that you add, until you've added all of your Users. So for instance, when you're done adding your first user in a series of three, the number would increment to "2 OF 3" and so on.

❺ **Configure your User in the Add New Users Details Box**: Now that you know what the Add New User Details box is all about as explained in step ❹, you are ready to start configuring your Users—which just means tweaking each setting in the Add New Users Details Box to your specifications (each setting is covered in Section 8-4). Before you start though, there are some important fields that should be updated each time a new User is added to ensure the uniqueness of the User you are creating. Because the cloning process (outlined in step ❷) copies all the fields from the User you selected to clone, the following settings will be copied onto the new user and should be change each time to ensure your Users stay unique from one another:

ⓐ **Card Name:** This is the name of your User and is usually the name of the host/moderator who is using the codes. Most of the time you will want this to be unique. If for instance, one person has ten users, you might want to increment each user with a number like 'John Doe-1', 'John Doe-2', etc. This can changed later in the User Details Box if needed.

ⓑ **Billing Code:** This is the variable billing code that will be attached to all the conference calls you make, and is usually unique for each User. Using billing codes can greatly augment your ability to track your conferencing expenditures and ManageYourConferencing provides a few very powerful options for doing this. For instance, by selecting the 'Hardcoded' option in the Billing Code section near the bottom of the Add New User Details Box you can choose a blanket billing code for your User which will be applied to all conference calls initiated by that user. By selecting 'On the Fly' you will be prompted to enter your billing code each time you—as the host/moderator—join your conference call. This will allow you to manually apply different billing codes to difference conference calls. Finally, by choose to receive a Phone Usage Report (located under the settings heading in the Add New User Details Box) after each of your conference calls, you will be able to manually change the billing codes for each conference by clicking a special link in those emails and updating them manually on ManageYourConferencing.com.

ⓒ **Contacts:** Be sure to update the email addresses each time to ensure that email correspondences are sent to the owner of the user you are creating. These include Welcome emails (your conference codes along with instructions on how to use them), Playback emails (instructions on how to access a previously recorded conference call and listen to it) and Phone Usage Reports (summaries of the conference sent after each conference call).

Once you've configured your User, continue to the next step to add it to the system.

Click Add User: Once your user is configured as explained in step ❺ you can add it by clicking the '**ADD USER**' link. Once done, the website will begin processing your new user and a 'Working' indicator will appear in the middle of the screen, letting you know that the website is processing your request.

After about 15 seconds the website will tell you whether the User was added successfully or not. If the User was not added successfully, you will get an error message underneath the Clone User Box telling you why. If this happens, just read through the error message and make the changes it needs to continue, then click the '**ADD USER**' link once more to process the new user request.

❻ Once the new User has been successfully added to the system, one of two things will happen depending on how many users you chose to setup as explained in step ❷:

1. If you chose to add only one User in step ❷, then you will be taken back to the Users screen (see Section 8 for information on Users) and your new User (the one you just created) will be selected.
2. If you chose to add more than one User in step ❷, then you will remain in the Add New Users screen and the system will wait for you to add another one. This process will continue until you've added all the Users you chose to add in step ❷. To keep track of how many Users you've added so far and how many users you have left to add, keep an eye on the 'M of N' indicator at the top of the User Details Box with 'M' being the number of the User you are currently adding and 'N' being the total number of Users you chose to add. See step ❹ for more information on this process. Once all user have been added you will be taken back to the Users screen and the last User in the set you just created will be displayed.

You can also safely cancel out of the Add New User process at any time by clicking the '**CANCEL USER**' link.

Figure 9-5 Adding Users Step-By-Step