Table of Contents

**Introduction** .................................................................................................................. 1

- Contents of this Guide .................................................................................................. 1
- Intended Audience ....................................................................................................... 1
- Version Information ..................................................................................................... 1
- What’s New in This Guide ............................................................................................ 2

**About the Admin Portal and User Roles** ..................................................................... 3

- Example Organization .................................................................................................. 3
- Users and Roles ............................................................................................................ 4
- Sign in to the Admin Portal .......................................................................................... 5
- Home Page .................................................................................................................. 6
- Administration Menu .................................................................................................... 7

**Adding and Managing Clients (Users)** ......................................................................... 8

- Add a Client .................................................................................................................. 9
  - Enter Profile Information .......................................................................................... 10
  - Assign the User to a Site ......................................................................................... 10
  - Set Up Default Tracking Codes ............................................................................. 11
  - Enter an Address .................................................................................................... 12
  - Provision Products .................................................................................................. 13
  - Client Added – Success Page .................................................................................. 14
- Search for a Client ........................................................................................................ 15
  - Copy a Client .......................................................................................................... 16
  - Resend Account Details ......................................................................................... 16
  - Delete a Client ........................................................................................................ 16
  - Edit a Client ............................................................................................................ 17
  - Edit a Client Page .................................................................................................... 17
  - Change the Account Password ............................................................................. 18
  - Update the Client’s Profile ................................................................................... 19
- Manage Audio Accounts ............................................................................................... 19
- Add an Audio Conference ............................................................................................ 20
- Manage Web Meetings .................................................................................................. 22
- Provision Account Requests ........................................................................................ 23

**Managing Site Settings and Branding** ............................................................................ 24

- Edit Site Settings ........................................................................................................ 24
  - Edit a Site Page ....................................................................................................... 25
  - Disable Automatic Screen Share Updates .............................................................. 26
- About Logos ................................................................................................................ 27
  - Logo Specifications .................................................................................................. 27
  - What is a Transparent Background? .......................................................................... 27
- Upload a Logo ............................................................................................................. 28
  - Example Meeting Screen ....................................................................................... 29
- My Conferencing Center .............................................................................................. 30
  - Login Page ............................................................................................................. 30
  - Home Page ............................................................................................................. 31
  - Add Links to Documents, Videos, and More .......................................................... 32
  - Allow Users to Sign Up for Services ....................................................................... 33
  - Example New Account Sign-Up Form ....................................................................... 35
### Reporting in the Admin Portal

- Report Status Page.................................................................38
- View and Save Report Results..............................................38
- Completed Meetings Report..................................................39
  - Completed Meetings ............................................................40
  - Summary by Client..............................................................41
  - Summary by Participant......................................................41
- Client Report ........................................................................42
  - Example Client Report......................................................43
- Operator Assisted Report.....................................................44
Introduction

The Administration Portal is a web-based tool used to create and manage users and meeting accounts, generate usage reports, and manage meeting options on behalf of account holders.

Contents of this Guide

This document provides an overview of the administration tasks typically performed by customer administrators and explains how to accomplish them via the Admin Portal. It contains the following sections:

- About the Admin Portal and User Roles
- Adding and Managing Clients (Users)
- Managing Site Settings and Branding
- Reporting in the Admin Portal

Intended Audience

This document is intended for customer administrators who provision and manage audio and web conferencing on behalf of their end users.

If you are a provider who manages audio and web conferencing products on behalf of your customers' companies and their end users, please see the Administration Portal Reseller Guide (for resellers and provider administrators).

Version Information

Information in this document is accurate for:

- Administration Portal 6.9
- My Conferencing Center 1.3
- Web Conferencing 3.7
- Audio Conferencing 15.0
What’s New in This Guide

This August 2015 version updates the previous version of the Administration Portal User Guide released in April 2015. It includes the following product changes:

- On Edit a Site, you can disable automatic update checks for Screen Share.
- If your provider allows you to manage branding, the Edit Site Branding ▶ Links ▶ Sign-Up Link Behavior/Text section lets you define what happens when a prospect clicks the SIGN UP button on the Login page of My Conferencing Center.
- Create a Client. When you select GlobalMeet or other third-party web conferencing products (if offered), the Admin Portal automatically provisions a corresponding audio conference for each web product.
- Edit a Client. When adding an audio conference to an existing client, you must select the appropriate Web Conference Type to ensure that the audio conference options are set correctly.
- Version Information reflects current production release numbers for all products discussed in this guide.
About the Admin Portal and User Roles

Your provider used the Admin Portal to perform the initial setup for your organization, creating a company with at least one site ("hub") and at least one administrative user assigned to that site.

**NOTE:** “Admin user #1” can sign in to your organization’s Admin Portal and create additional users, provision audio and web conferencing for users, etc.

All account holders have a login to their company’s Admin Portal. The Admin Portal restricts access to administrative features based on the user’s admin level or role (in the Admin Portal, referred to as User Type).

All customers are organized into the following hierarchy. Your company’s site includes a company-specific version of the Admin Portal, My Conferencing Center, audio conferences, web meeting URLs, and end users (account holders).

The previous diagram shows how the Admin Portal arranges a typical organization. Admin Portal terms are *in italics.*

- Your organization is a **company** under a **provider**.
- Each company has at least one **site**.
- A site contains an Admin Portal, My Conferencing Center host portal, users (**clients**), users’ audio conferences, and users’ web meeting rooms.
- Web meeting URLs are based on the site’s URL.
Users and Roles

Administrators use the Admin Portal to add users – referred to as clients. You create the client under a specific site and assign the user a role. The user’s role determines their access to various administrative features.

- All users are at least Hub Moderators – that is, web or audio conferencing account holders.
- As a company under your provider, your administrator role is a Hub Admin (HA), but certain customer setups require granting Hub Group Admin (HGA) or Corporate Customer Admin (CCA) rights. Any of these admin levels can manage site settings, branding, and can create and manage users.

The following table summarizes the scope of responsibilities for each user level.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Customer Admin (CCA)</td>
<td>If an organization has more than one company, its companies are grouped under a corporate customer. A CCA can manage sites and can create and manage users for the companies.</td>
</tr>
<tr>
<td>Hub Group Admin (HGA)</td>
<td>If a company has multiple sites, they are organized into a hub group. A HGA can edit each site’s settings; create users under the admin’s own company and manage users for sites within the hub group.</td>
</tr>
<tr>
<td>Hub Admin (HA)</td>
<td>Assigned to one site. A HA can create users under an assigned site, manage users within the site, and edit site settings.</td>
</tr>
<tr>
<td>Hub Moderator</td>
<td>An end user or meeting “owner.” Uses the Admin Portal to manage his or her own profile and web and/or audio conference settings.</td>
</tr>
</tbody>
</table>
Sign in to the Admin Portal

All users can access the Admin Portal to manage their own accounts (meetings) and view usage reports for their meetings.

To access the login page, go to the Admin Portal at https://<sitename>.conferencinghub.com/ and enter the email address associated with your client profile and your password. Your Admin Portal's web address may have a different syntax than the example here.
Home Page

After you sign in, the Admin Portal displays the Home page. The Home page contains mostly end user options – those you would use to manage your own user profile and update your web meeting and audio conference options.

Use the Reports and Administration menus to access administrative features.
Administration Menu

When you sign in as an administrator, the menu bar includes the ADMINISTRATION menu. Options on the menu depend on your admin level. If you are responsible for more than one site, then the SITE MANAGEMENT option lets you search among your assigned sites for the site to manage.

The following example shows the Administration menu for a Hub Group Admin.

<table>
<thead>
<tr>
<th>HOME</th>
<th>REPORTS</th>
<th>ADMINISTRATION</th>
<th>SEARCH</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>MY PROFILE</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>CLIENT MANAGEMENT</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>SITE MANAGEMENT</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>MANAGE LICENSES</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>ACCOUNT REQUEST QUEUE</td>
<td></td>
</tr>
</tbody>
</table>

- Add users and update existing users within your assigned site(s).
- Edit web conferencing features for your users' meetings
- View and provision account requests submitted via My Conferencing Center.
- Future use.
Adding and Managing Clients (Users)

A user in the system is a *client*, and that client can have one or more *accounts* – that is, audio conferences and web meetings. Clients are created under a specific site; this controls the Admin Portal they use, their audio conferences, and their web meeting URLs.

As an administrator, you can add new clients and update and delete existing clients. As with other administrative tasks, you are limited to managing clients based on your admin level.

You can create and manage clients:

- Associated with one of your assigned sites.
- With a lower user level than yours.

**IMPORTANT:** *You are not allowed to create or edit “peers,” that is, users with the same admin level as yours.*

This section explains how to:

- **Add a Client**
- **Provision Products for a Client**
- **Search for a Client** and then edit or delete
- **Copy a Client** – create a new user based on an existing one
- **Resend Account Details**
- **Delete a Client**
- **Edit a Client** and manage meeting options and products on behalf of the client
- **Review and provision** new account requests submitted via the My Conferencing Center sign-up form.
Add a Client

On the Administration menu, select Client Management ► Add a Client. The Admin Portal displays the Add a Client page.

There are four sections on this page.

- **Profile** – enter contact details for the user, assign the user to a site, and select a user type that determines their administrative permissions, if any.
- **Tracking Fields** (optional) – define default billing and/or reporting codes to include in all meeting reports for the user.
- **Address** – your user’s physical address (street, city, etc.).
- **Products** – provision audio and/or web conferencing for the user, or select None to create only the client in the system.

Each section is explained on the following pages.
Enter Profile Information

In the top section of the page, enter the user’s first and last name, contact phone number, email address, preferred language, and time zone.

In addition to contact details, you also assign the user to a site and select a user type that determines their administrative permissions, if any.

Company and site are selected automatically (HA); or, choose from your assigned sites and/or companies.

Email Address is the user’s login ID

Hub Admins can create meeting hosts (moderators) only

Assign the User to a Site

Clients are created under a specific site, which determines the Admin Portal they use and their web meeting URLs. You must assign the new user to a site.

You cannot type in the Company or Site fields; this ensures that the company and site are selected (and spelled) correctly. Depending on your admin level, the fields are already completed or you can search for the correct company and/or site.

NOTE: Once you assign a site for the user, you cannot change it.
If you are a Hub Admin, both company and site are already selected.

If you are a Hub Group Admin or CCA, use Search to select the company (CCA only) and site to which the new user will be added.

**Set Up Default Tracking Codes**

Optional. Set default values for up to three tracking fields, if enabled for your organization.

Meeting reports are generated automatically at the conclusion of every web or audio meeting. If enabled by your provider, you can define up to three reporting codes or IDs to include automatically in meetings the user conducts. For example, to include a specific billing reference number for this user’s meetings, enter it here.
Enter an Address

In the Address section, enter the user’s mailing address. This information is typically used for tracking purposes. For example, if you want to allocate meeting costs by location, enter the business address where your user works.
Provision Products

Audio conferencing, web conferencing, and third-party audio integrations (which use Automated Audio for the audio portion) are all considered products. There are two options:

- **Select products** – set up an audio-only account or include web conferencing.
- **No products** – this option creates the client, but does not assign any products. You could use this option to create an administrator login for someone who does not need a meeting room.

When you provision GlobalMeet or a third-party web conferencing product, an audio conference is automatically provisioned with the correct options. This is only when you create the client. When you add an audio conference to an existing client, select the type of audio conference you are adding. This is explained later in this section.

To set up an audio-only customer, select None next to Web Product.

If your company offers only audio conferencing, the Web Product section is hidden. Select which audio conferencing product to provision.

![Diagram of Products section](image-url)
Client Added – Success Page

After you complete all four sections on the page, click Save. The Admin Portal creates the user and provisions the selected services. When finished, it displays a success page with key details about the new user. Use the links on this page to:

- Send a welcome email to your new user
- View and edit the client’s profile information
- View and edit the audio and web conferencing accounts you just provisioned
- Copy all user information and meeting details (URLs, access numbers, passcodes, etc.) to the Clipboard

Client Added/Edited Successfully

<table>
<thead>
<tr>
<th>Name:</th>
<th>Leslie Moore</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client ID:</td>
<td>3560373</td>
</tr>
<tr>
<td>Web Password:</td>
<td>3560373</td>
</tr>
<tr>
<td>Site (hub):</td>
<td>example1.example.com</td>
</tr>
<tr>
<td>Company Name:</td>
<td>ExampleDotCom</td>
</tr>
<tr>
<td>License Assigned:</td>
<td></td>
</tr>
<tr>
<td>Web Room URL:</td>
<td><a href="https://example1.example.com/LeslieMoore">https://example1.example.com/LeslieMoore</a></td>
</tr>
<tr>
<td>Audio account title:</td>
<td>Leslie's Meeting</td>
</tr>
</tbody>
</table>

Opens the Edit a Client page. For more information, see Edit a Client, later in this guide.
Search for a Client

To find a client in the system, on the:

- Administration menu, select Client Management ► Search for a Client.
- Search menu, select Search for a Client.

You can search by First and/or Last Name, Client ID, Email Address, Billing Reference Number, Special Info, or by External ID.

The First and Last Name fields let you search for clients whose names "start with" the two (or more) characters you enter. For example, a search for first names that start with "Jo" would return clients with the names, Joan, Joanne, Joe, John, Joseph, etc.

Enter your search criteria, and then click Search. The page refreshes and displays search results at the bottom.
From the search results, you can use the Action buttons to manage the client.

**COPY.** Create a new client based on this client.

**EDIT.** Update the client.

**RESEND DETAILS.** Resend login credentials.

**DELETE.** Permanently remove this client and all associated services.

### Copy a Client

Select Copy to create a new client based on the selected client. The new client is automatically assigned to the same site as the existing client, and the same services are provisioned.

On the Copy a Client page, be sure to enter the new user’s profile and address details.

### Resend Account Details

Select Resend Details to send the client’s login credentials to the client, yourself, and other recipients via email. As a security precaution, this option always sends the credentials to you, the logged in administrator.

### Delete a Client

In the search results, click the Delete button. Confirm you want to permanently remove the client.
Edit a Client

As an administrator, you can manage all aspects of a user's account on his or her behalf. This includes:

- Updating contact details
- Changing login information – the user’s email address or password
- Updating or removing tracking information added to meeting reports
- Enabling or disabling meeting features for audio and web conferencing accounts
- Adding new web and audio conferencing accounts, or removing existing accounts
- Viewing usage reporting (REPORTS menu)
- Accessing meeting recordings (from Admin Portal Home page)

Edit a Client Page

Search for the client you want to edit, and then in the search results, click the Edit button. The Admin Portal displays the Edit a Client page.

Edit A Client

* Denotes a required field

Change Password

Profile Information

Profile
Tracking Fields
Address

Audio Accounts

View Audio Accounts

Web Meeting Rooms

View Web Meeting Rooms

Save  Cancel
There are three main sections on this page. Click the [+] next to any item to view and update that group.

- **Profile Information** – the contact details, tracking fields, and address you entered when creating the client.

- **Audio Accounts** – the audio accounts provisioned for the user. You can enable and disable conference features, reset audio passcodes, and provision a new audio account or remove an existing one.

  You cannot delete an audio conference if it is associated with a web meeting.

- **Web Meeting Rooms** – the web meetings provisioned for the user. You can enable and disable meeting features, change a meeting URL, and provision a new web meeting or remove an existing one.

  **NOTE:** When you click Save, the Admin Portal displays a success page with key details about the updated client and products.

**Change the Account Password**

Account passwords are used to sign in to the Admin Portal, to web meetings as the owner, and to other applications like the Meeting Toolbar.

To change a client's password, click Change Password at the top of the page. Enter the new password and retype the password to confirm it.
Update the Client’s Profile

Expand the Profile section to view and update contact details for the user. This section contains the same information as Add a Client, plus the Client ID.

Manage Audio Accounts
Expand the Audio Accounts section to view and manage the client’s audio conference accounts.

The following client has Web Conferencing and Adobe Connect. When you look at her Audio Accounts, there are separate audio conferences for each web conference type.

Use the Actions buttons to manage a specific audio account.

**NOTE:** You cannot delete an audio conference if it is associated with a web meeting.

Add an Audio Conference

Audio conferences that you add after the client is created are not automatically tailored to web conferencing or another audio integration. Select the appropriate...
Adding and Managing Clients (Users)

Web Conference Type to ensure that the audio conference options are set correctly.

Select:

- GM Audio Only for an audio-only account.
- GlobalMeet Web if the audio account will be used for web meetings.
- Other options as advised by your account representative.

**NOTE:** Once the web conference type is selected for an audio conference, you cannot change its type. You have to delete the audio conference and create a new one.
Manage Web Meetings

Expand the Web Meetings section to view and manage the client’s web meetings.

Create a new web meeting.

<table>
<thead>
<tr>
<th>Type</th>
<th>Meeting Room Name</th>
<th>Meeting Room URL</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Enabled Room</td>
<td>Leslie2</td>
<td><a href="https://example1.example.com/Leslie2">https://example1.example.com/Leslie2</a></td>
<td></td>
</tr>
<tr>
<td>Web Enabled Room</td>
<td>LeslieMoore</td>
<td><a href="https://example1.example.com/LeslieMoore">https://example1.example.com/LeslieMoore</a></td>
<td></td>
</tr>
</tbody>
</table>

Edit  Delete
Adding and Managing Clients (Users)

If your company offers My Conferencing Center to its customers, and accepts new account requests from the SIGN UP button on the Login page of My Conferencing Center, then completed applications are sent to an account request queue in the Admin Portal.

Any HA or higher assigned to a site can review the applications and provision new clients and accounts. Applications are associated with specific sites (remember that each My Conferencing Center portal is associated with a site – https://<sitename>.myconferencingcenter.com/).

On the ADMINISTRATION menu, select ACCOUNT REQUEST QUEUE.

- **Provision Account Requests**
  - If you manage multiple sites, select one from the list.
  - **Approve.** Open the Add a Client page to create the user and provision services.
  - **Deny.** Confirm that you want to remove the pending account request.

### Account Request Queue

To view and confirm provisioning details for the pending new user's account, select APPROVE below. You will be able to view all account requests before saving. After saving, you will have options, such as viewing the provisioned account and sending a welcome email to the new user.

To deny a request and remove it from the queue, click DENY. The email you received for the request contains the user's email and phone number. Choose to notify that the request was denied.

If a request below is for a user whose account has already been provisioned outside this queue process, select DENY to remove the request and prevent provisioning a duplicate account by selecting APPROVE. Provisioning a duplicate account could affect charges on your invoice.

The queue includes requests for which you are authorized to approve or deny, based on the company specified in the request.

#### Search Client Requests By

- **Site (hub):**
  - exampleabc

---

**Requester's Name** | **Date Received** | **Action** | **Action**
---|---|---|---
Stephen NewAccount | 5/12/2014 5:33:11 PM | Approve | Deny
Managing Site Settings and Branding

If you have administrator role, you can manage settings for your assigned sites. In the Admin Portal, site settings include:

- Default time zone and language for your Admin Portal.
- The web conferencing features are available to your end users (hosts).
- Single sign-on URL for auto-logging in to the Admin Portal.
- If allowed by your provider, you can upload a meeting logo, determine how the SIGN UP button on the My Conferencing Center login page behaves, and add links to the My Conferencing Center home page.

This section explains how to update site settings and branding.

Edit Site Settings

As an administrator, you can use the Edit a Site page to manage settings for your Admin Portal and the availability of meeting features.

To open the Edit a Site page, on the Administration menu, select Site Management ▶ Manage This Site to edit the site (Admin Portal) to which you are signed in. Or, select Search for a Site to choose from your assigned sites.

If you are a Hub Admin, just select Site Management to edit your assigned site.
Edit a Site Page

The Edit a Site page contains three sections: Profile, Web Conferencing Options, and Administrative Options. Make all desired changes and then click Save.

If your provider has granted its customer administrators the permission to manage branding for their sites, there is an Edit Site (hub) Branding link at the top of the page. Click the link to open the Edit Site Branding page and upload a logo.
Disable Automatic Screen Share Updates

By default, Screen Share automatically checks for updates. The Screen Share auto-update option lets you turn off automatic update checks.

Screen Share Auto-Update. Clear this checkbox if you do not want Screen Share to check for updates.
About Logos

By default, your Admin Portal and Web Conferencing meeting screens inherit your provider’s logos. If your provider has granted permission, HAs and higher can upload the meeting logo via the Edit Site Branding page, illustrated below.

Logo Specifications

The meeting logo must be:

- GIF or PNG with transparent background
- 150px wide x 50px tall
- 128k maximum size

If your logo image does not occupy the full width of the image – that is, your logo is not 150px wide – align the logo to the left side of the image canvas.

What is a Transparent Background?

You should set the background of your logos to be transparent. A transparent background allows the color of the underlying page to show through without having a rectangular area of white (or another color) surrounding your logo.

A white background can make your logo look like it is transparent, but when you place the logo on a dark background – for example, the meeting page – you will see a rectangle around your logo.

**TIP:** When you upload a logo, click Preview to ensure that your logo looks the way you intend. Then, click Save to use the logo.
**Upload a Logo**

On the Administration menu, select Site Management ► Manage This Site, and then click the Edit Site Branding link.

Click Choose File and select your meeting logo, then click Preview to make sure the logo looks correct on the background. Finally, click Save to use the uploaded logo.
Example Meeting Screen

The meeting screen displays the logo you uploaded at the top left of the toolbar.
My Conferencing Center

My Conferencing Center is a streamlined version of the Admin Portal that gives hosts (end users) quick access to frequently-used meeting management features.

If your provider has granted permission to manage branding, use the Edit Site Branding ► Links tab to customize My Conferencing Center:

- Sign-up Link Behavior – configure the SIGN UP button on the Login page.
- My Conferencing Center Links – define up to six custom buttons on the home page.

Login Page

Account holders (that is, clients or hosts) can sign in to My Conferencing Center using their existing account credentials. All others can click SIGN UP to get instructions for requesting an account or complete a new account request form, if available.

Support contact options are set up by your provider.
**Home Page**

The My Conferencing Center home page includes the additional links that were defined on the previous page.
Add Links to Documents, Videos, and More

If your provider has granted permission, HAs and higher can customize the home page of My Conferencing Center, adding up to six additional buttons to the page. You can add buttons that point to other web pages, YouTube videos, publicly available documents, or even documents that your company hosts on its servers. As long as the content is accessible via a Web address, you can link to it.

Each link opens a separate browser tab (or window), leaving My Conferencing Center open in its original browser tab.

To add a button, click [+ Add new record, enter the button label (link text) and destination URL, and then click Insert.

**IMPORTANT:** When you finish defining links, click Save My Conferencing Links.
Allow Users to Sign Up for Services

There are three methods for allowing users to sign up for audio or web conferencing services. You can:

- Open an external sign-up page that you host.
- Display a short paragraph that explains how to sign up for an account.
- Display the new account form from the My Conferencing Center login page.

On Edit Site Branding ➤ Links, use the Sign-up Link Behavior/Text section to define what happens when a prospect clicks SIGN UP button on the Login page of My Conferencing Center.

The following screen is an example of the Edit Site Branding page as seen by customer administrators, if you request that they be allowed to manage branding.
Redirect to a Web Address

Use this option to enter the URL for an external sign-up page that you host. When a person clicks the SIGN UP button on My Conferencing Center, the page is opened in a new browser tab or window.

- Redirect user to a web address
  
  https://example.com/sign-up

Show Helper Text

Use this option to display instructions for applying for a new account. The text is displayed when a person clicks SIGN UP on My Conferencing Center.

SIGN UP

To sign up for a conferencing account and obtain login credentials for this site, please contact your company’s administrator or department for conferencing services. For additional questions regarding your account or our conferencing solutions, please select the Help link in the upper right corner of this page to view a list of Support Resources.
Example New Account Sign-Up Form

Depending on your company’s settings, SIGN UP button on the Login page of My Conferencing Center can open a sign-up form. Completed applications are sent to an account request queue (ADMINISTRATION ► ACCOUNT REQUEST QUEUE), where they can be reviewed and new accounts provisioned.

The following screen is an example.

```
SIGN UP

COMPANY: ExampleDotCom

FIRST NAME
LAST NAME
EMAIL
INTERNATIONAL PHONE PREFIX
PHONE NUMBER
PHONE EXTENSION

LANGUAGE

COUNTRY

ADDRESS 1
ADDRESS 2
ADDRESS 3
CITY

STATE/PROVINCE

POSTAL CODE

TIMEZONE

ACCOUNT TYPE

SUBMIT
```

Each person receives a separate account to host meetings. Your request for an account will be sent to your company’s administrator for approval and set up. Please contact your administrator if you have not received the account details within 48 hours.
If your company uses tracking fields, the sign-up form displays the fields at the bottom of the form.

If your company has tracking fields defined, the Sign-Up form includes them.

Each person receives a separate account to host meetings. Your request for an account will be sent to your company’s administrator for approval and set up. Please contact your administrator if you have not received the account details within 48 hours.
Reporting in the Admin Portal

The Admin Portal includes various usage reports and a Client Report, which allows you to retrieve all clients associated with a site. The Completed Meetings report is available to all users – including Hub Moderators.

All reports are queued, so that you can keep working while your report is completed. When you run a report, the Admin Portal displays the Report Status page (explained on the next page).

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
</table>
| Completed Meetings   | Searches for all web and audio meetings conducted within the past 90 days, during a 30-day time period. There are three parts to the report:  
  - Summary by Meeting – lists basic usage information  
  - Summary by Client (explained below)  
  - Summary by Participant (explained below)  
  All users can view their own completed meetings. Administrators can include meetings for all clients in their assigned sites. |
| Summary by Client    | For a selected site and date range, this report shows audio and web meeting minute totals, participant totals, and per-meeting averages, broken down by client. |
| Summary by Participant| Includes details from completed web meetings.                               |
| Client Report        | Lists all clients assigned to a selected site, their client IDs, meeting URLs, and user type. |
| Operator Assisted    | CCA and higher. Retrieves all scheduled (future) events for a date range you specify. |
Reporting in the Admin Portal

Report Status Page

Select REPORTS ► REPORT STATUS to open the Report Status page. This page lists all reports that you have run. Reports you recently requested have a status of Not Started or In Progress.

When a report is complete, the status changes to Completed. (Click the Refresh button to see the updated status.) Click the report icon in the Results column.

View and Save Report Results

You can open any completed report from the Report Status page: click the report icon in the Results column. The Admin Portal opens the report in a new browser window.

At the top of the page is a small toolbar. From here, you can:

- View the report online.
- Print one page or the entire report.
- Save a copy of the report in a variety of file formats, including PDF, spreadsheet, and HTML.
The Completed Meetings report shows basic usage information for meetings conducted during a selected date range. It includes information previously contained in the Summary by Client and Summary by Web Participant reports.

The system retains the most recent 90 days of activity and restricts reports to 30 days of activity per report.

**NOTE:** The report includes usage information, but not detailed billing information.

All users can run this report for their own meeting accounts. Administrators can include meetings for all clients associated with their assigned sites.

The Admin Portal displays the Report Status page. The report you just requested has a status of Not Started or In Progress. You can stay on this page and wait to get the report when it is finished.
Completed Meetings

The completed report is available on the Report Status page (REPORTS ► REPORT STATUS). Use the View options to switch among Summary by Meeting, by Client, and by (web) Participant.
Summary by Client

The Summary by Client Report shows audio and web meeting minute totals, broken down by client.

The report includes usage information, but not detailed billing information.

<table>
<thead>
<tr>
<th>Client Name</th>
<th>Meetings</th>
<th>Minutes (Duration)</th>
<th>Participant Minutes</th>
<th>Recordings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rebecca Thomas</td>
<td>Audio</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>Web</td>
<td>1</td>
<td>30</td>
<td>79</td>
</tr>
<tr>
<td>Garrett Hughes</td>
<td>Audio</td>
<td>3</td>
<td>90</td>
<td>300</td>
</tr>
<tr>
<td></td>
<td>Web</td>
<td>6</td>
<td>150</td>
<td>450</td>
</tr>
<tr>
<td>Shane Rogers</td>
<td>Audio</td>
<td>3</td>
<td>90</td>
<td>300</td>
</tr>
<tr>
<td></td>
<td>Web</td>
<td>5</td>
<td>150</td>
<td>450</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>All Clients</th>
<th>Meetings</th>
<th>Minutes (Duration)</th>
<th>Participant Minutes</th>
<th>Recordings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio</td>
<td>6</td>
<td>180</td>
<td>500</td>
<td>3</td>
</tr>
<tr>
<td>Web</td>
<td>11</td>
<td>360</td>
<td>979</td>
<td>7</td>
</tr>
</tbody>
</table>

Summary by Participant

The Summary by Participant view provides detailed information about the participants in web meetings.
**Client Report**

The Client Report lists all clients (users) associated with a particular site or company.

To start the Client Summary report, go to the REPORTS menu and then select CLIENT REPORT. Enter your search criteria, and then click Generate Report.

Optionally, you can restrict (filter) search results to include only those clients with the Client ID, Last Name, Special Billing Reference Number, or Special Info code you enter, or list those of a specific user type.

The Admin Portal displays the Report Status page. It lists all report requests that you have submitted; the report you just requested has a status of Not Started or In Progress.
Example Client Report

The following example shows a client report that lists all clients (users) assigned to the site, example1.

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Address</th>
<th>Client ID</th>
<th>Company Name</th>
<th>Site (hub)</th>
<th>User Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bill Stephens</td>
<td><a href="mailto:bill.stephens@example.com">bill.stephens@example.com</a></td>
<td>123 Main Street, City Atlanta, CountryCode USA</td>
<td>1234xxxxxx</td>
<td>ExampleDotCom</td>
<td>example1</td>
<td>Hub Admin</td>
</tr>
<tr>
<td>Garnett Hughes</td>
<td><a href="mailto:garnett.hughes@example.com">garnett.hughes@example.com</a></td>
<td>123 Main Street, City Atlanta, CountryCode USA</td>
<td>1234xxxxxx</td>
<td>ExampleDotCom</td>
<td>example1</td>
<td>Corp Custom Admin</td>
</tr>
<tr>
<td>Mary Jones</td>
<td><a href="mailto:mary.jones@example.com">mary.jones@example.com</a></td>
<td>123 Main Street, City Atlanta, CountryCode USA</td>
<td>1234xxxxxx</td>
<td>ExampleDotCom</td>
<td>example1</td>
<td>Hub Group Admin</td>
</tr>
<tr>
<td>Rebecca Thomas</td>
<td><a href="mailto:becky@example.com">becky@example.com</a></td>
<td>123 Main Street, City Atlanta, CountryCode USA</td>
<td>1234xxxxxx</td>
<td>ExampleDotCom</td>
<td>example1</td>
<td>User</td>
</tr>
<tr>
<td>Sean Brown</td>
<td><a href="mailto:sean.brown@example.com">sean.brown@example.com</a></td>
<td>123 Main Street, City Atlanta, CountryCode USA</td>
<td>1234xxxxxx</td>
<td>ExampleDotCom</td>
<td>example1</td>
<td>User</td>
</tr>
</tbody>
</table>
Operator Assisted Report

CCA only.

The Operator Assisted report retrieves all scheduled (future) events for a date range you specify. These are operator-assisted events that are scheduled outside the Admin Portal.

The completed report is available on the Report Status page (REPORTS ► REPORT STATUS).