# Meeting View User Guide

## Overview

Meeting View is a web-based interface providing direct visibility into your audio conference, increasing control of the event. Meeting View allows you and other pre-designated leaders and speakers to:

- View/Edit names and user defined fields of all participants on the call
- Gauge meeting attendance
- Prioritize, promote and manage the question and answer queue
- Chat to operator or other speakers
- Sort participant list
- View availability of other participants on-line
- Mute/un-mute/disconnect participants

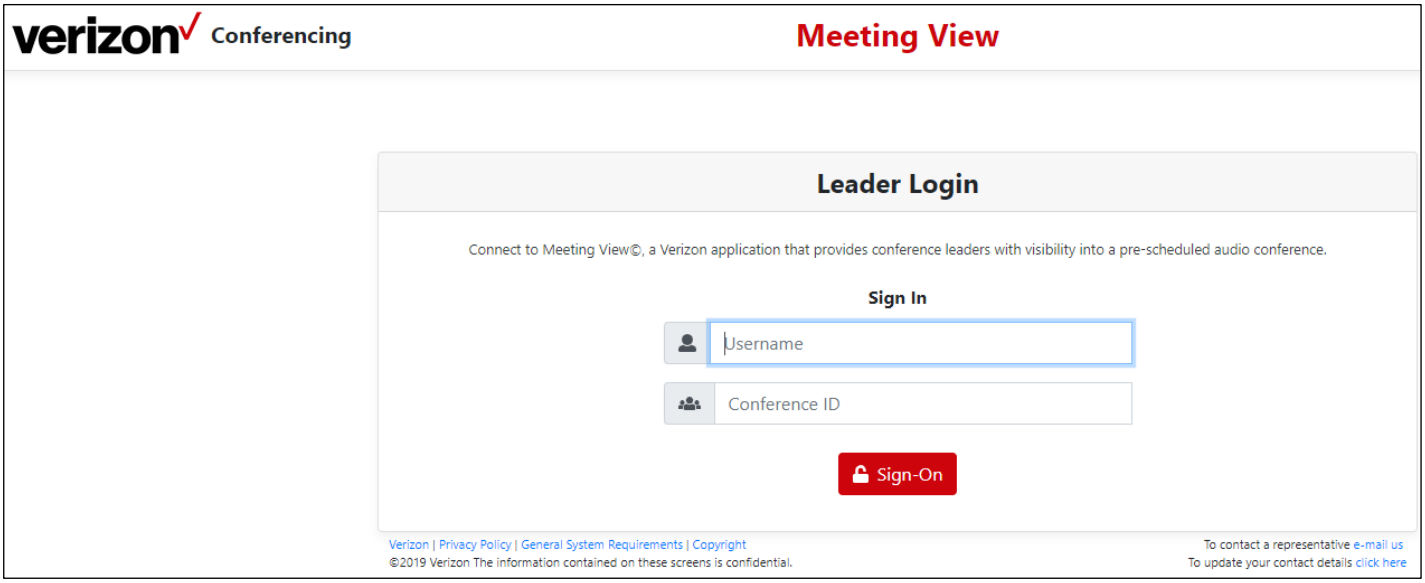
*Note: It is recommended that no more than 5 people (including the lead coordinator or Meeting Manager) log in as leaders.*

## System Requirements

- Windows 7+, OSX
- IE 10+, Edge 12+, Chrome 16+, Firefox 11+, Safari 7+
- SOCKS protocol support

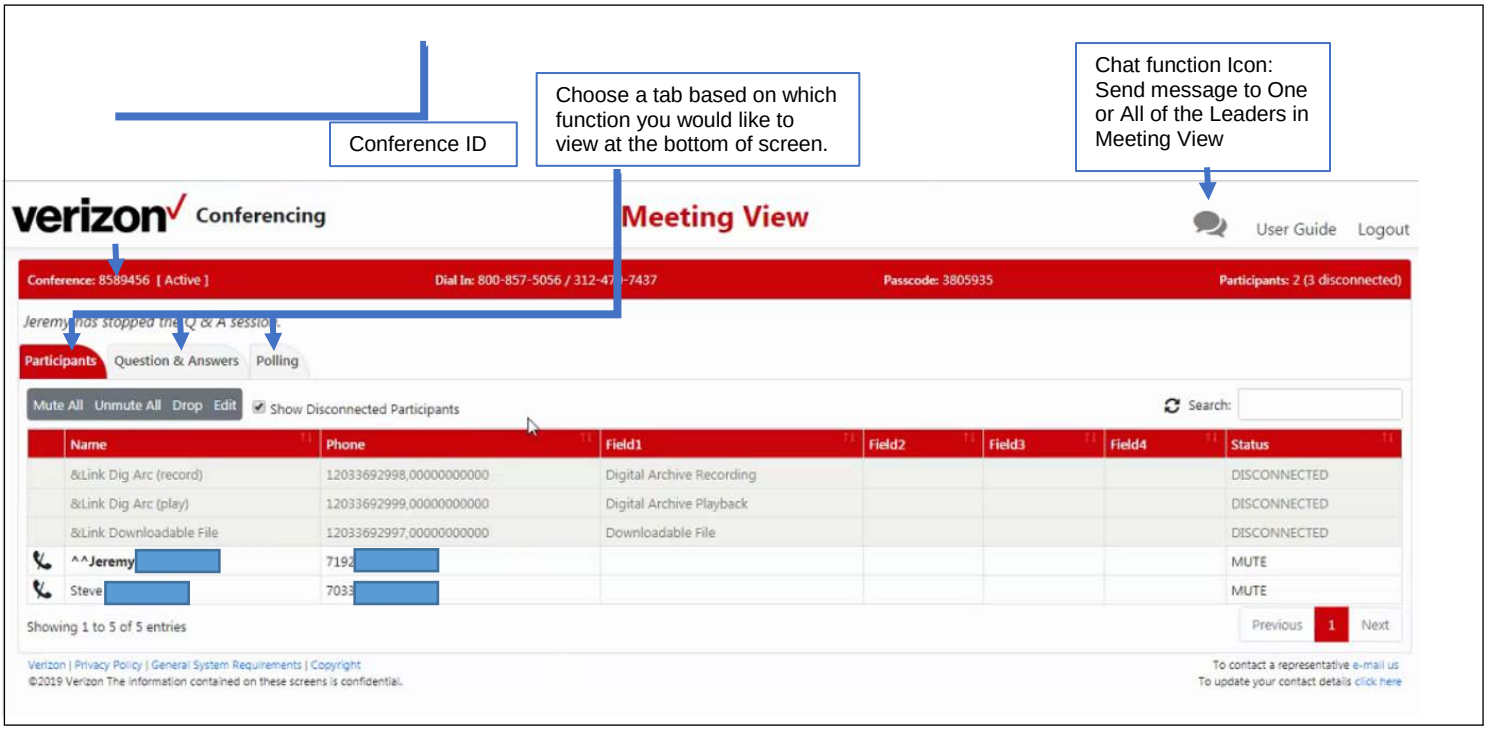
## Getting Started with Meeting View

### Login Screen:



Enter your name in the *User Name* field. This is the name which will appear on the Meeting View leader window. The *Conference Number* is the confirmation number for the conference call, which is given to the customer at the time of the reservation and can also be found on the confirmation email.

## Main Screen:




### Web Leaders

- ***Message to be sent:*** The leader can send a chat message to another leader who is logged into the Meeting View session. The leader simply clicks on the *Chat* button on the top right of the screen.
- ***Messages:*** When a new message appears for the leader, the *Chat* button on the top right of the screen will display in Red.

### Control Tabs

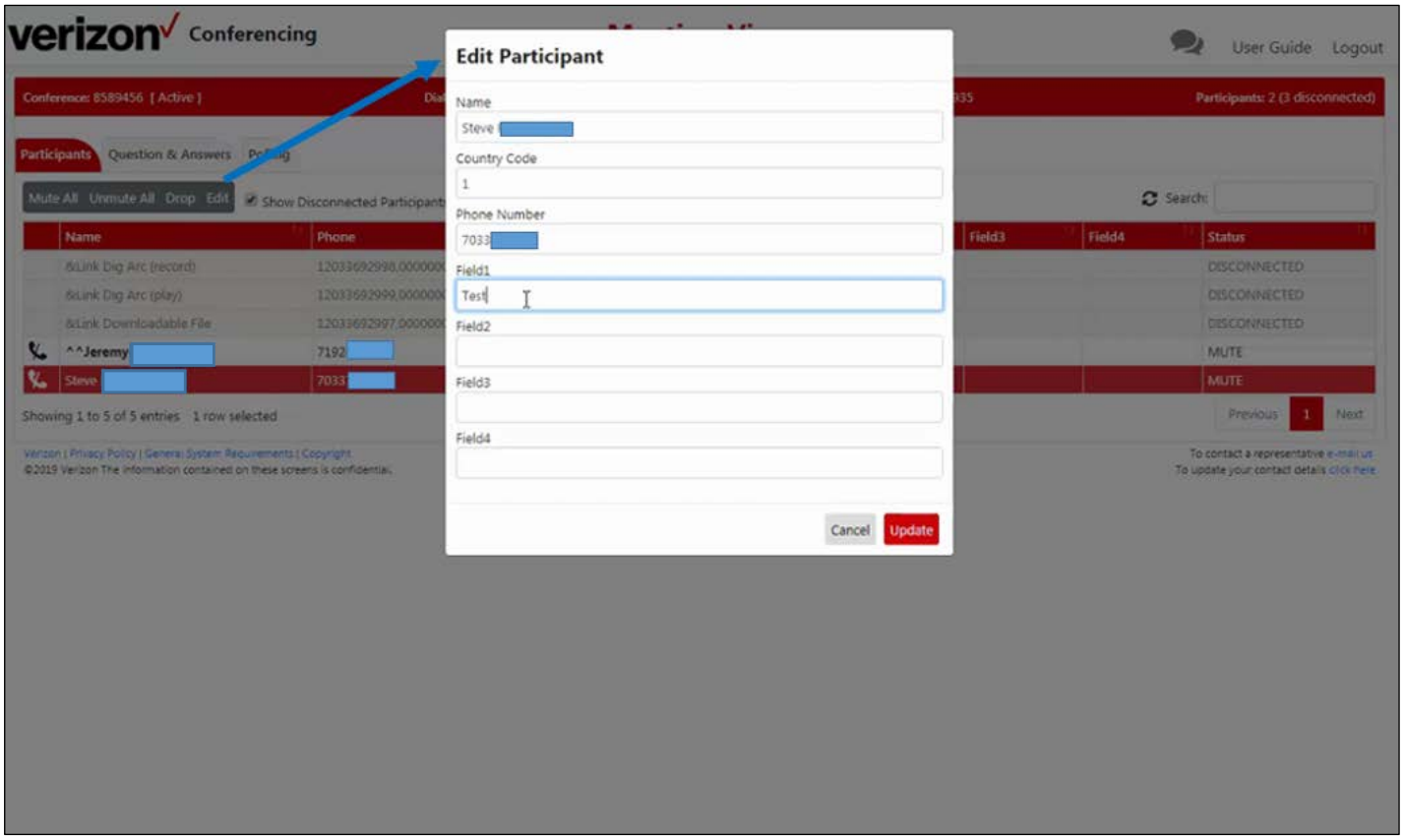
- ***Participants:*** This function displays the *Conference Participants* and their current state.
- ***Q & A:*** In this function, the participants, that have queued up to ask a question, will appear in the Question Queue that appears on the bottom half of the screen.
- ***Polling:*** The *Polling* information appears on the bottom half of the screen while in this function.

## Control Tabs:

### Conference Participants

- At the time of the call, the Conference Coordinator can collect necessary information for each participant. If collected, the following information will appear on the Meeting View screen. The columns can be sorted in ascending or descending order by clicking on the triangle in the name or company column.

    - Name
    - Phone
    - Editable User Defined Fields, i.e. Company, City, State, etc.…



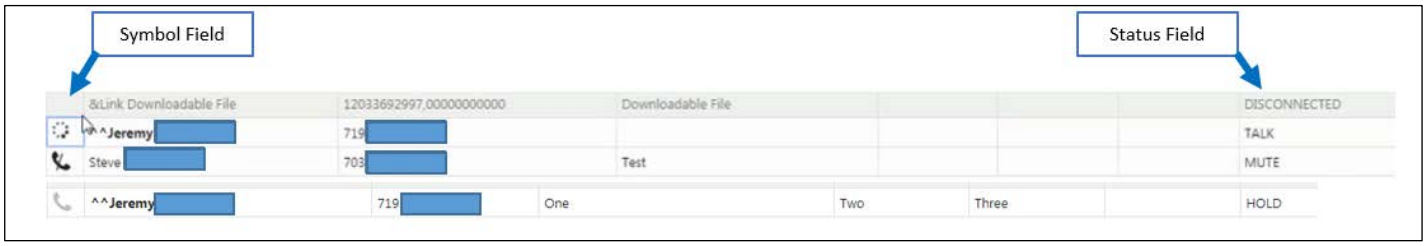

- To the left of each participant name is a symbol. The symbols are defined below:

  **Speaker:** The participant is in talk mode when this symbol appears next to their name.

  **Speaker with Phone Line Strike:** The participant is muted when this symbol appears next to their name.

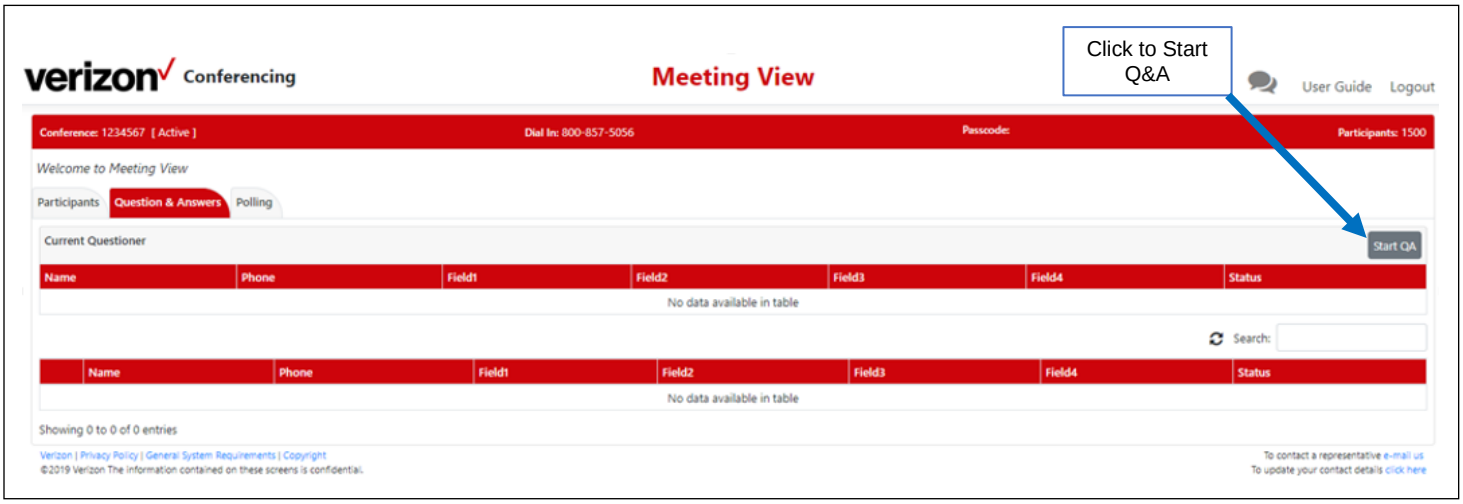
  **Speaker on HOLD:** The participant is on HOLD

  There is no symbol for a participant that has disconnected.

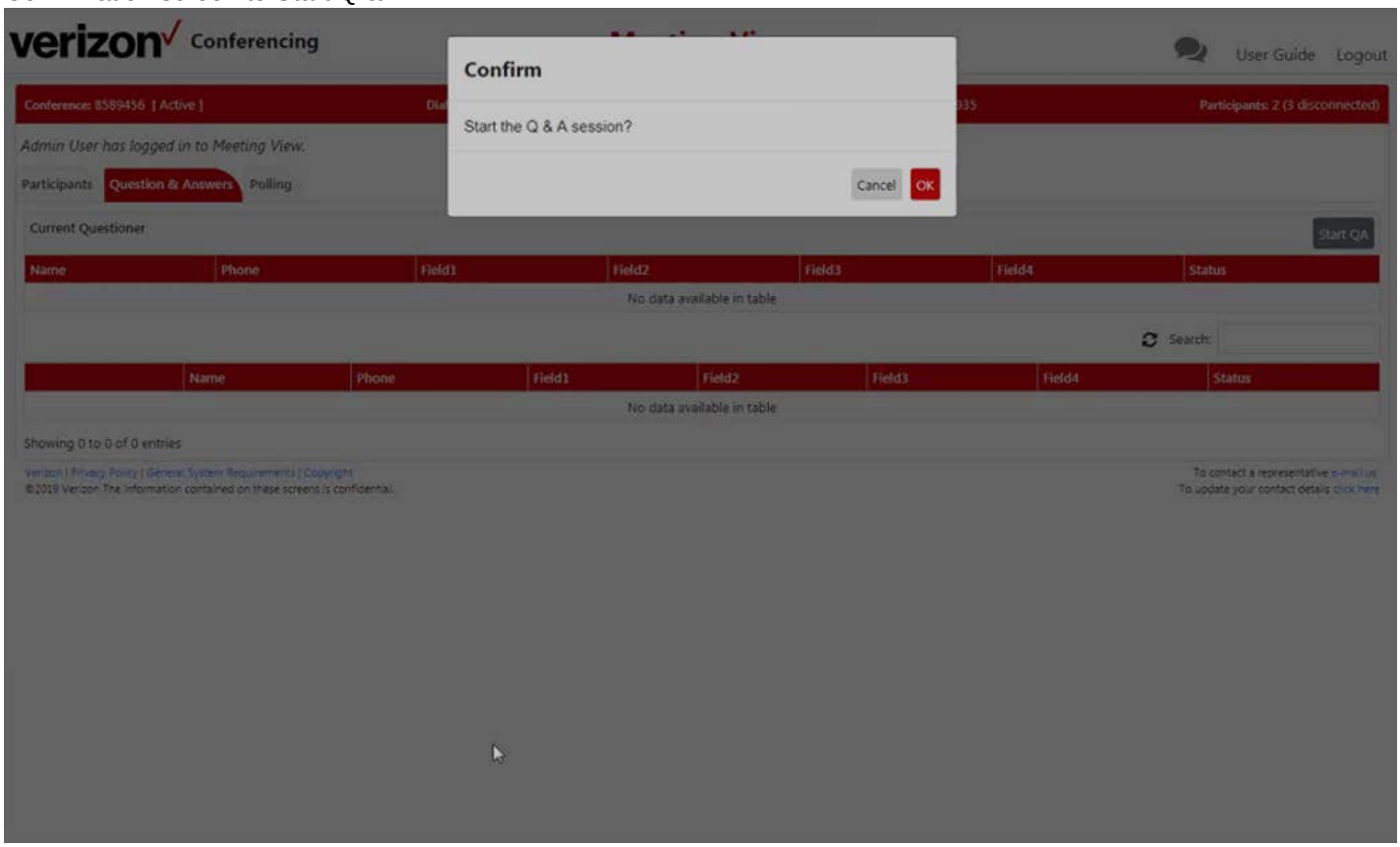



- The current state of the line is displayed in the *Status* field on the right. This could be one of the following:
  Mute
  Talk
  Disconnected
- The leader can mute or unmute participants by highlighting the participant's name and clicking on the *Mute* or *UnMute* button on the left-hand side of the screen.
- The leader can search participants easily by first and last name using the *Search By Name* field.
- The leader can see actions taken by leaders below the conference confirmation number-expand the folder for more actions.

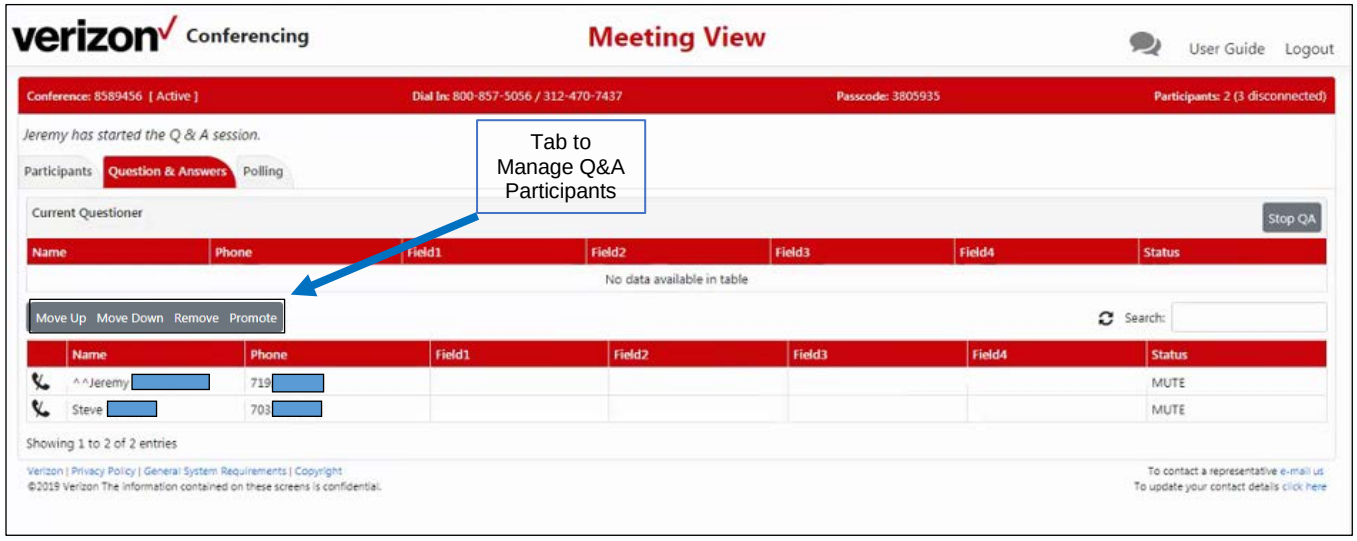
# Q & A Screen:



Confirmation screen to Start Q &A




In the *Q & A* function, the *Question Queue* appears at the bottom of the screen. The Q & A function can be managed while in the *Q & A* session.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Logout
Conference: 8589456 [ Active ]
Dial In: 800-857-5056 / 312-470-7437
Passcode: 3805935
Participants: 2 (3 disconnected)
Jeremy has started the Q & A session.
Tab to Manage Q&A Participants
Participants
Question & Answers
Polling
Current Questioner
Stop QA
Name
Phone
Field1
Field2
Field3
Field4
Status
No data available in table
Move Up
Move Down
Remove
Promote
Search:
^^Jeremy
719
MUTE
Steve
703
MUTE
Showing 1 to 2 of 2 entries
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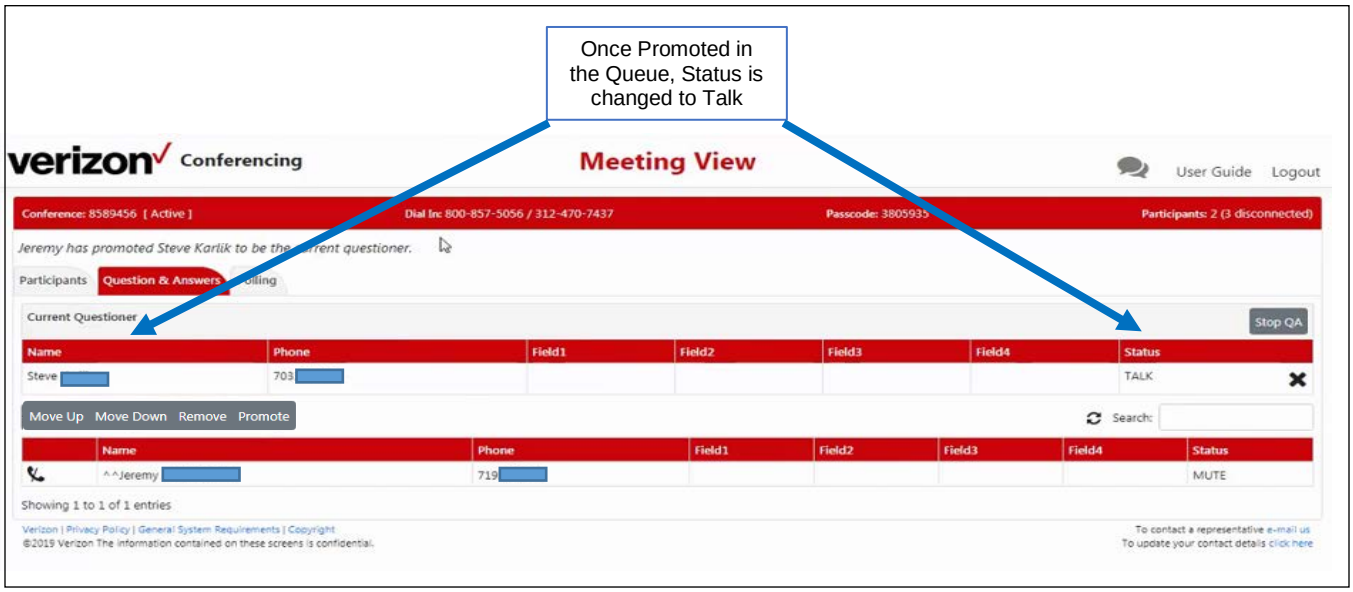
Once Promoted in the Queue, Status is changed to Talk
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Conference: 8589456 [ Active ]
Dial In: 800-857-5056 / 312-470-7437
Passcode: 3805935
Participants: 2 (3 disconnected)
Jeremy has promoted Steve Karlik to be the current questioner.
Participants
Question & Answers
Polling
Current Questioner
Stop QA
Name
Phone
Field1
Field2
Field3
Field4
Status
Steve
703
TALK
Move Up
Move Down
Remove
Promote
Search:
^^Jeremy
719
MUTE
Showing 1 to 1 of 1 entries
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**Question Queue**

- ***Current Questioner:*** In the *Current Questioner* section, the name of the participant who is asking the question displays in this field. Once the participant appears in this field, their line is unmuted. The leader can stop Q & A by clicking on the *Stop QA* button. The leader may also remove the current questioner and place them back into conference in a muted mode by selecting the *Remove* button.
- ***In Queue:*** The number of participants in the queue is indicated above the list of the participant's names. The participant's name and company name, if this information was collected, are provided for the leader so that the Q & A function can be managed.

  ***Remove:*** Participants can be removed from the queue without asking their question by highlighting the participant's name and clicking on the *Remove* button.
  ***Promote:*** A participant can be promoted as the *Current Questioner* by highlighting the participant's name and clicking on the *Promote* button.
  ***Up:*** A participant can be rearranged in the question queue by highlighting the participant's name. To move the participant up in the queue click on the *Up* button on the right-hand side of the screen.
  ***Down:*** A participant can be rearranged in the question queue by highlighting the participant's name. To move the participant down in the queue click on the *Down* button on the right-hand side of the screen.

## Polling Tab:

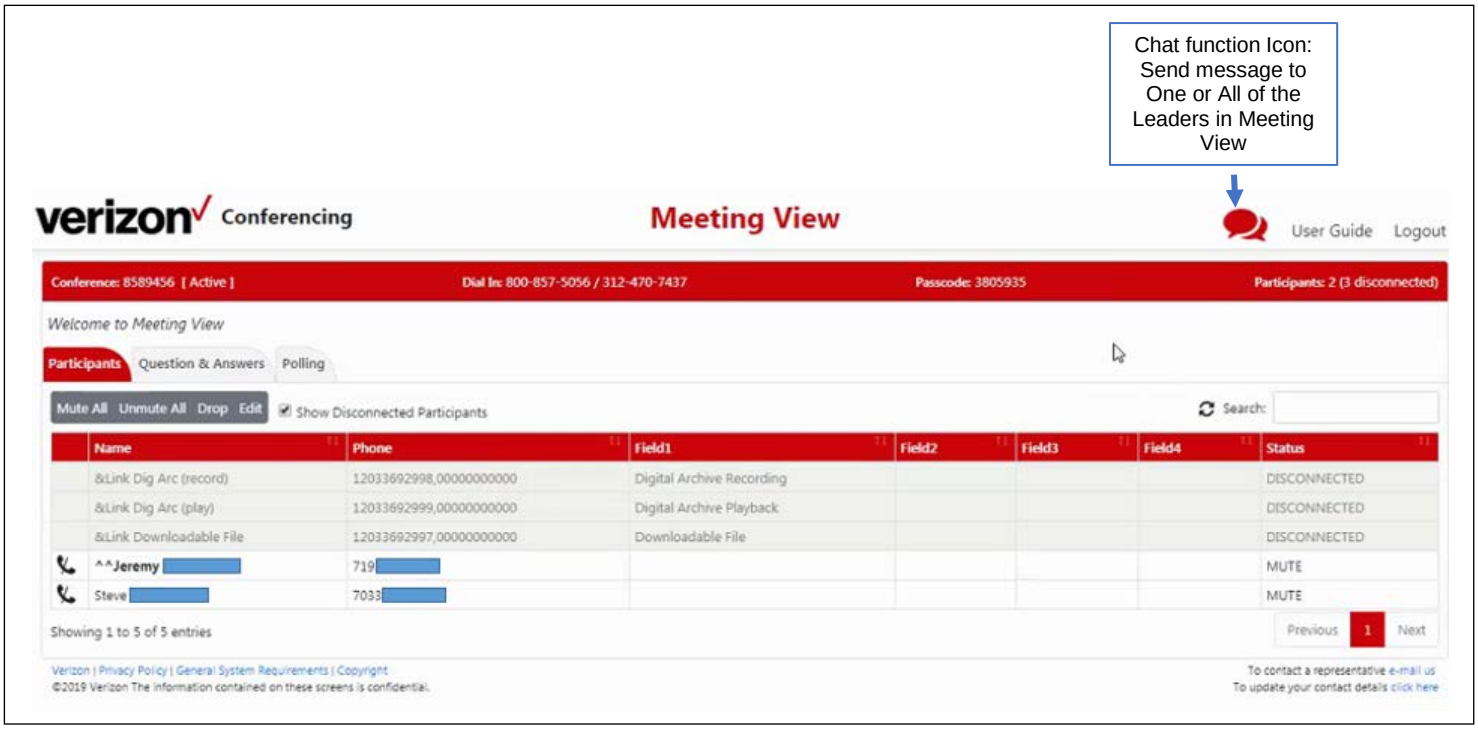
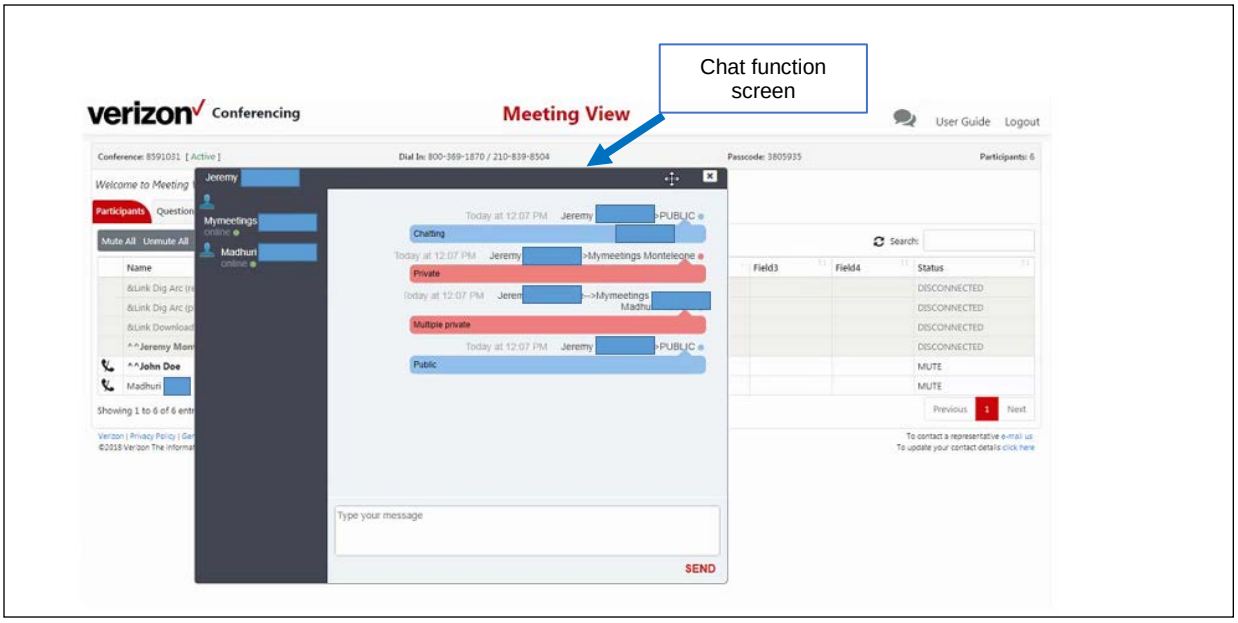
In the *Polling* function, the polling results appear at the bottom of the screen. The question will be displayed as well as the current results. The results will change real-time as the participants cast their vote.

*Note: Polling feature must be requested at the time of reservation. Questions should be sent to the Event Specialist in advance of the call.*

## Chat Function:

### Web Leaders

- ***Message to be sent:*** The leader can send a chat message to another leader who is logged into the Meeting View session. The leader simply clicks on the *Chat* button on the top right of the screen.
- ***Messages:*** When a new message appears for the leader, the *Chat* button on the top right of the screen will display in Red.
- ***Messages to multiple leaders:*** Use the control feature and highlight the leaders you want to chat to. If sending to all the leaders no control is needed.
- ***Stop sending to multiple leaders:*** Click on the names again to un-highlight.



## Chat Conversation Screen: