Reservationless Audio Conferencing Service
Instant Meeting

Quick Reference Guide
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getting Started</td>
<td>2</td>
</tr>
<tr>
<td>Touch Tone Features</td>
<td>3</td>
</tr>
<tr>
<td>Getting Started with Web Moderator</td>
<td>4</td>
</tr>
<tr>
<td>Web Moderator Features</td>
<td>5</td>
</tr>
<tr>
<td>Sub-Conferencing</td>
<td>6</td>
</tr>
<tr>
<td>Conference Recording</td>
<td>7</td>
</tr>
</tbody>
</table>
Attending a Reservationless Instant Meeting

- Dial the toll-free dial in number (1-866-982-8346) provided in the meeting invitation
- If needed, use the Global Access numbers for international meeting participants
- All meeting participants will be prompted to enter the Participant Passcode (Meeting ID)
- You will then be placed into your meeting

Hosting a Reservationless Instant Meeting

- In your meeting invite, include your Participant Passcode (meeting ID) and the dial-in number (1-866-982-8346). Include Global Access numbers for international participants as appropriate for their region and calling plan.
- To start your call, dial in to the appropriate access number.
- Enter the Participant Passcode, follow the prompts and enter your Leader Passcode when requested
- You will then be placed into your meeting

Need additional assistance? Contact Fidelity Investments Reservations at 1-866-846-0498 or 1-210-276-3627.
# Reservationless Instant Meeting Touch Tone Features

<table>
<thead>
<tr>
<th>Command</th>
<th>Feature</th>
<th>Description</th>
<th>Leader Command</th>
<th>Participant Command</th>
</tr>
</thead>
<tbody>
<tr>
<td>*0</td>
<td>Operator Assistance</td>
<td>Technical difficulties</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>*1</td>
<td>Private Help Menu</td>
<td>A pre-recorded message is played privately, describing all dial-tone features</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>*2</td>
<td>Roll Call (in conference)</td>
<td>All participants will hear announcement of the names of everyone on the call</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>#2</td>
<td>Sub-conferencing</td>
<td>Activate the sub-conferencing feature</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>*3</td>
<td>Private Roll Call</td>
<td>Personal playback of the names of everyone on the call</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>*4</td>
<td>Mute All</td>
<td>Leader mutes every participant’s audio line (the leader’s line stays open)</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>*5</td>
<td>Conference Continuation</td>
<td>The leader may specify whether or not the active conference will continue once the leader disconnects from the call</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>*6</td>
<td>Self Mute/Unmute</td>
<td>Mute own line</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>*7</td>
<td>Lock/Unlock</td>
<td>Prevent additional participants from joining active conference</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>*9</td>
<td>Guest Entry</td>
<td>Set participant entry and exit to tone, recorded name or silent</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

## Leader Instant Meeting Default Settings

- Quick Start: No
- Name Record: Yes
- Auto Continuation: Yes
- Conference Entry: Enter and Announce
- Waiting Room: No
- Participant List: No

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**Note:** To change default settings, call Fidelity Investments Reservations at 1-866-846-0498 or 1-210-276-3627.
Getting Started with Web Moderator

System Requirements
Web moderator supports all browsers that are supported by Google Web Toolkit:
- Microsoft® Internet Explorer® 6, 7
- Mozilla Firefox 1.0, 1.5, 2.0
- Apple Safari 2.0, 3.0
- Opera 9.0

Accessing Web Moderator
1. Go to http://www.mymeetings.com/fidelity
2. You will be taken to the Manage My Meetings login page; enter your login name and password.
3. Click on the Instant Meeting tab.
4. For each Instant Meeting subscription you have, there are a set of icons to the right. Clicking on the icon for your preferred conference will launch the Web Moderator.

Menu Bar      View Selection Bar      Tool Bar

Refer to the navigation panel (to the left) for the following Web Moderator features information.

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• **Mute/Un-mute** - Mute or un-mute individual participants. You also have the ability to mute all participants with a single click.

• **Entry Exit Mode**: Choose how participants will be announced. Go to the Conference menu, highlight Entry Exit Mode and select Play Recorded Name, Silent, or Tone.

• **Roll Call**: To play a roll call, select Conference from the menu bar and select Roll Call, then select Public or Private. Public is to the entire conference, while a private roll call is for the leader only.

• **Conference Continuation**: Select this option from the Conference menu if you would like your conference to continue when the leader hangs up.

• **Lock**: Prevent additional participants from joining your conference. Go to the Conference menu, highlight Security, and select Lock.

• **Talking Indicator**: To activate the talking indicator, open the Conference menu, and click Talking Indicator. To deactivate, click again. When the talking indicator is activated, you will see under Status an animated volume indicator next to the name of the participant who is currently talking.

• **Dial - Leader**: Use this feature to start your call directly from the web moderator. Click the telephone icon on the tool bar or click Conference and choose Dial Leader under Dialouts. A dialog box will appear with your name and phone number. Edit the phone number if needed, and click OK when ready. The system will then call you at the number provided. When you pick up, you will be immediately placed into your meeting.

• **Dial – Participant**: Call a participant to add them directly to your conference. Click the telephone icon on the tool bar and choose Dial Participants. Choose a contact from your list, or enter the name and phone number of the participant you would like to add. You can also access this feature by clicking Conference and choosing Dial Participants under Dialouts.

  **Note**: Total number of participants dialed cannot exceed the leader's subscription size.

• **Contacts** - Add, modify, delete, and dial contacts.
  - To manage, edit and maintain your list of Contacts, select the Contact List option in the navigation panel. Select the contact you wish to edit.
  - To add a new contact, choose New Contact from the Action drop-down menu. Fill out the dialog box, and click Add.

• **Waiting Room**: Use this feature to place participants in a holding area rather than allowing participants to enter your meeting automatically. Enable or disable this feature from the Conference menu under Security. Once enabled, the waiting room feature will notify you when participants are waiting to join your meeting. You may then connect parties into the main conference or prevent them from joining the conference (this will disconnect them from the call).

• **Sub-Conference**: Use the Sub-Conference feature to allow participants to meet in smaller groups outside of the main conference. Leaders have the ability to add or remove participants from a sub-conference, and to end the sub-conference.

• **Disconnect**: Highlight the participant you would like to remove from your conference and click the Disconnect icon on the toolbar.

• **End Audio Conference**: You can end the conference by choosing this option from the Conference menu.

• **Help**: Clicking Help from the menu bar will display the Web Moderator Help screen that explains all features of the Instant Meeting Web Moderator. You may also retrieve information about your Instant Meeting subscription under About.

• **Email Participant List**: Receive a participant list via email.

• **Record Conference**: Leaders with recording privileges can record their conference call. The recording of the conference is available in cassette, CD, or downloadable file format.

  **Note**: Recording requires business justification and approval. Additional
Sub-Conferencing

Starting a Sub-Conference
Allow participants to breakout into small groups outside of the main conference by selecting Conference > Sub-Conferencing > Start Sub-Conferencing. To stop sub conferencing and return participants to the main conference, select Conference > Sub-Conferencing > Stop Sub-Conferencing. Sub Conferencing can also be activated/deactivated via the #2 touch tone command.

Creating a Sub-Conference
Once sub-conferencing is activated, a sub-conference will need to be created before participants can be moved into a specific sub-conference. Choose the Conference > Sub-Conferencing > Create Sub-Conference menu item:

Removing/Renaming Sub-Conferences
You can rename sub-conferences by selecting Conference > Sub-Conferencing > Rename Sub Conference. You can remove a sub-conference by selecting Conference > Sub-Conferencing > Remove Sub-Conference or by pressing the touch tone command #2.

Joining a Sub-Conference
Participants may join or move between sub-conferences by entering a touch tone command of 1##, up to 9##.

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**Recording Conferences**

Record your conference using the Toolbar record icons (start, restart and stop) or by selecting **Conference > Record Conference** and choosing **Start Recording** (or **Stop Recording**). A dialog box will appear, displaying the phone numbers that parties can use to listen to the recorded conference.

**View Recording Conference Details**

Allows you to email a message to participants with the phone number details to hear the replay. Click **Conference > View Conference Recording**.

**Conference Recording Details**

Enter Participants Email in the box provided.

Note: Recording requires business justification and approval. Go to Myaccess.fmr.com to submit request. In the “Know the Request You Want” section, enter **Audio Conf. Recording** and click “Go”. Click “Proceed to Next Step”. Complete the form and submit the request.

If you were already approved prior to June 2014 you are not required to re-submit.

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