GENESIS
VideoToGo
ONLINE MEETING AND CONFERENCING
A MINORITY-OWNED BUSINESS ENTERPRISE

Table of Contents

Account Roles_____

- **Owner:**

  - There is only one Account Owner.
  - The Owner has Admin and Host capabilities.
  - The Owner is responsible for billing duties.
  - The Owner can set the Company Name and Street Address that appear in Email Invitations.
  - On Enterprise accounts, the Owner has access to the white label settings.

- **Admin:**

  - Admins have all Host capabilities.
  - Admins are able to join, edit, and delete other hosts' and admins' meetings and recordings.

- **Host:**

  - Hosts can create and join video conferences and webinars.
  - In Pro and Enterprise accounts, hosts can record their meetings.
  - Hosts have their own Account Dashboard and calendar; they do not see other hosts' meetings or recordings.

Login to Your Account _____

- ✓ Owner
- ✓ Admin
- ✓ Host

  - Navigate to your account in your browser (e.g., "app.website.com").
  - Enter your **User Name** and **Password** and click **Login**.
  - If needed, you can reset your password by clicking the **Forgot Password** link.

- When successfully logged in, you will see your Account Dashboard.

    - Hosts do not have access to the Billing and Users buttons.
    - Admins do not have access to the Billing button.
   - The API is only available on Enterprise accounts.
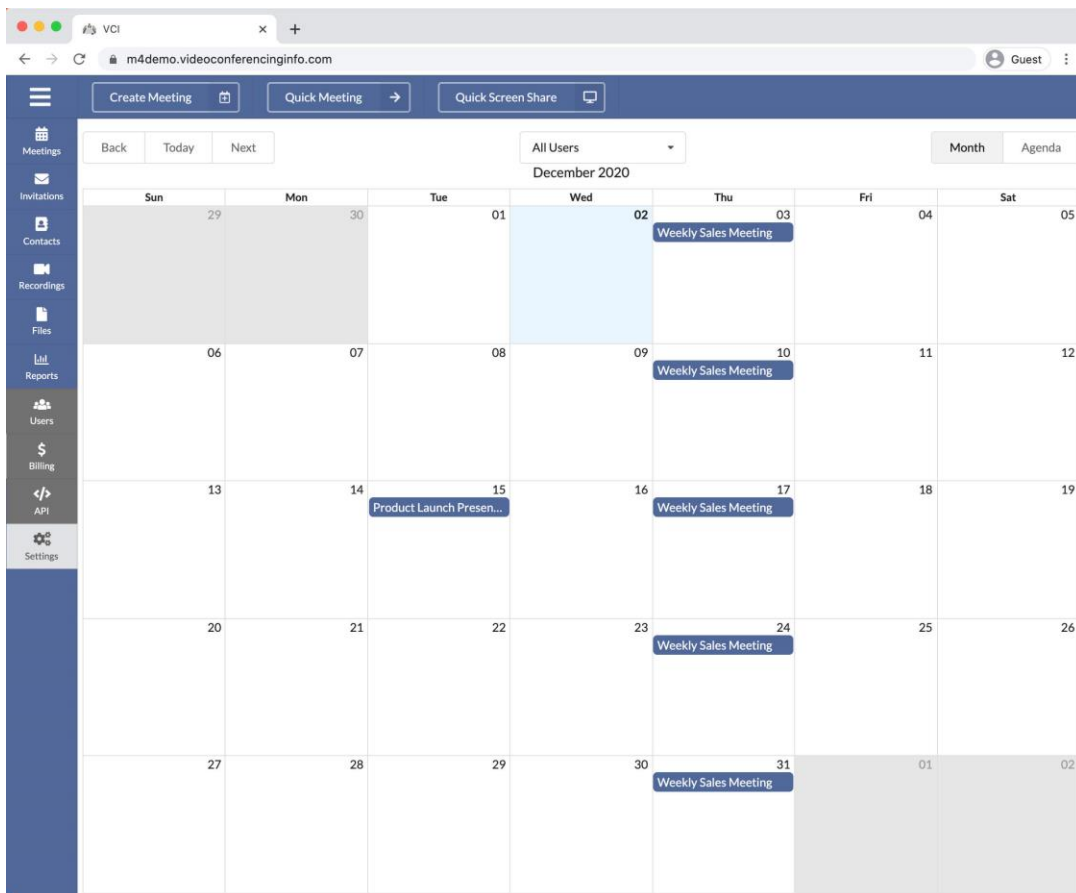
Users

✓ Owner
✓ Admin
✓ Host

The Users section allows you to manage Host and Admin users of your account.

- **Add:** add a new Host and/or Admin user to the account.

  - Requires an available host license.
  - Additional host licenses can be added to your subscription from the Billing section.
  - Send the newly added login the activation email so they can set up their password.

- **Edit:** edit the selected user.
- **Delete:** delete the selected user.

  - Deleting a user deletes all associated data including meetings, recordings, API keys, and usage history.
 - Deleted users and their data are **not** recoverable.
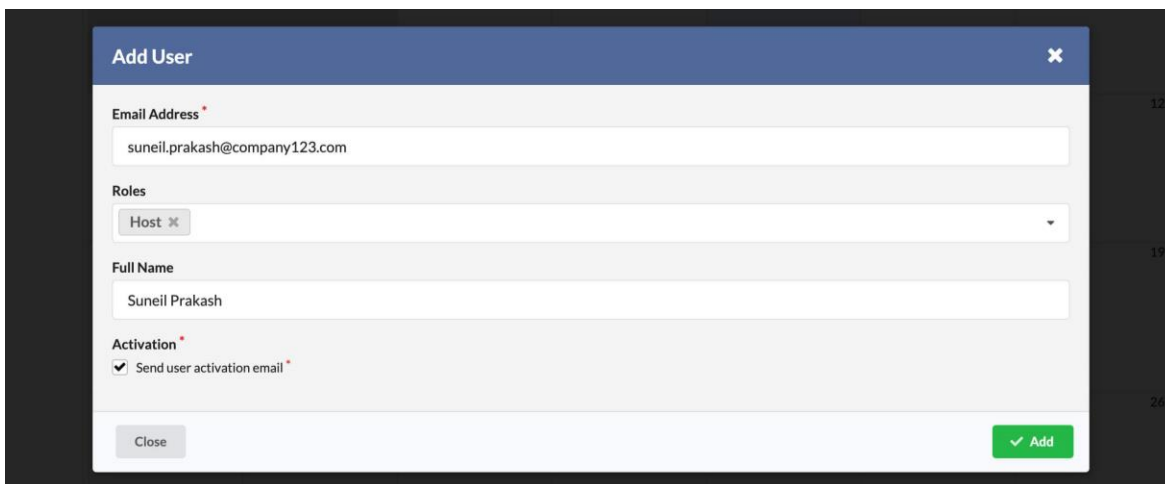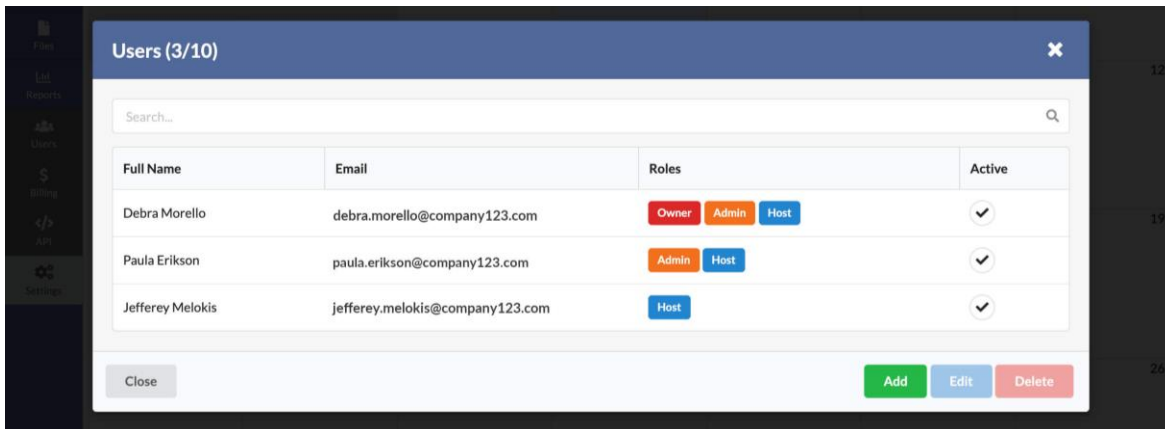
Billing

✓ Owner
✓ Admin
✓ Host

The Billing section allows you to view your current plan and make changes to your plan and billing preferences.

- **Edit Plan:** Change your plan, billing frequency, number of host licenses, or cancel the subscription.
- **Edit Payment Method:** Update the credit card on file for future payments.
- **Past Invoices:** View PDFs of your previous payments.
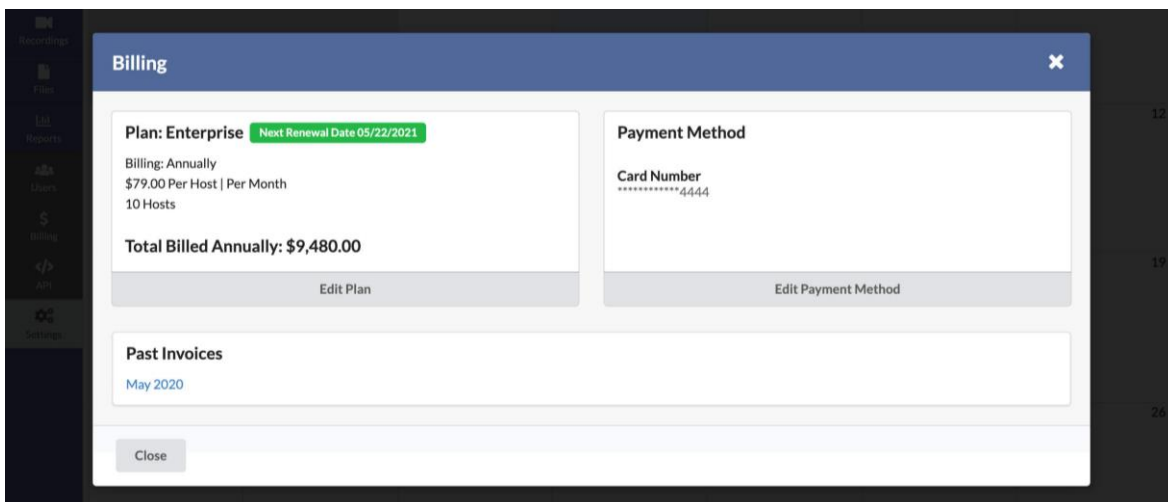
- **Plan:** Change plans (Starter, Pro, Enterprise).
- **Billing:** Change billing frequency between Monthly or Annually.
- **Hosts:** Increase or decrease the number of host licenses.

  - You can only remove host licenses that are not in use by an active user.
  - If you delete an active user, you will be able to remove the host license that was occupied by that user.
  - All accounts require a minimum of one (1) license to remain active.

- **Cancel:** Cancel your subscription immediately, and retain access to the end of the current billing cycle.
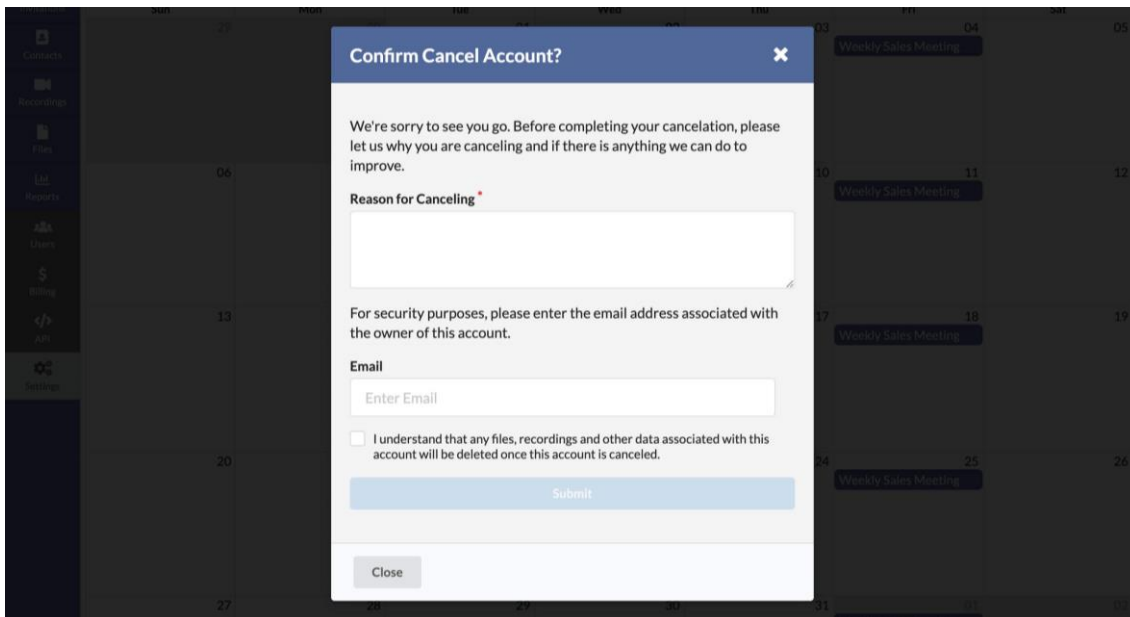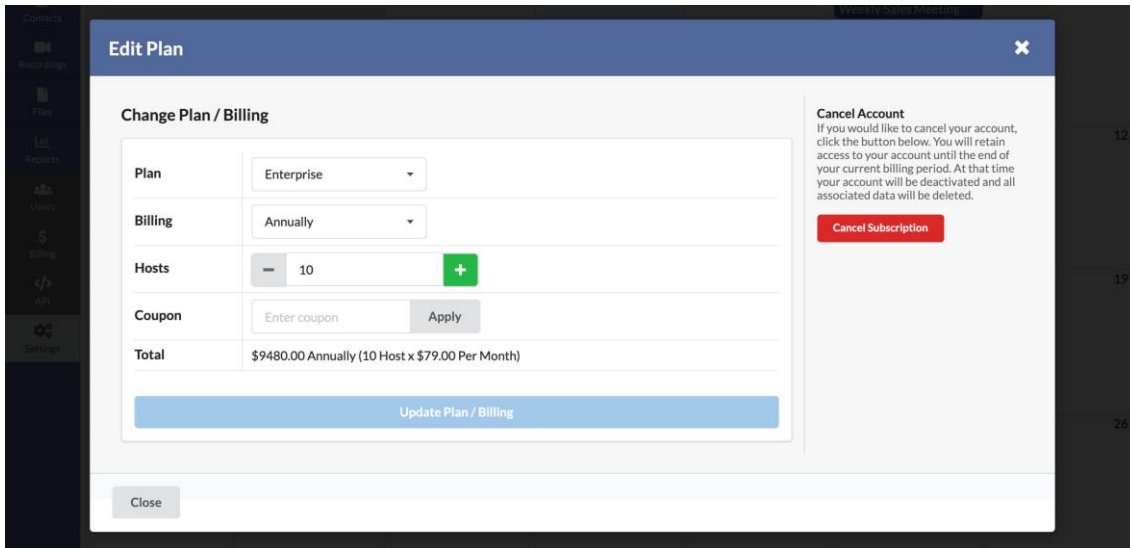
- **Add/Edit Payment Method:** Update the credit card on file for future payments.
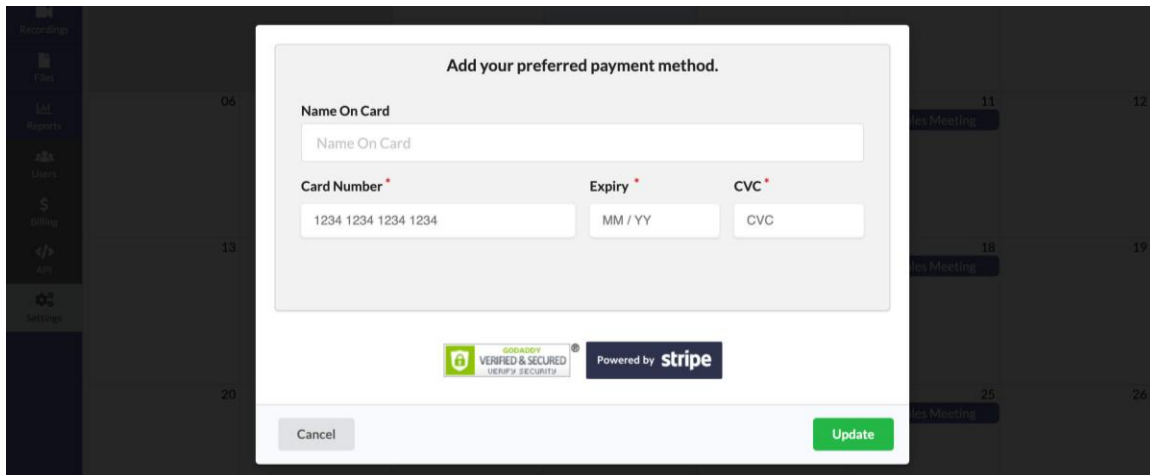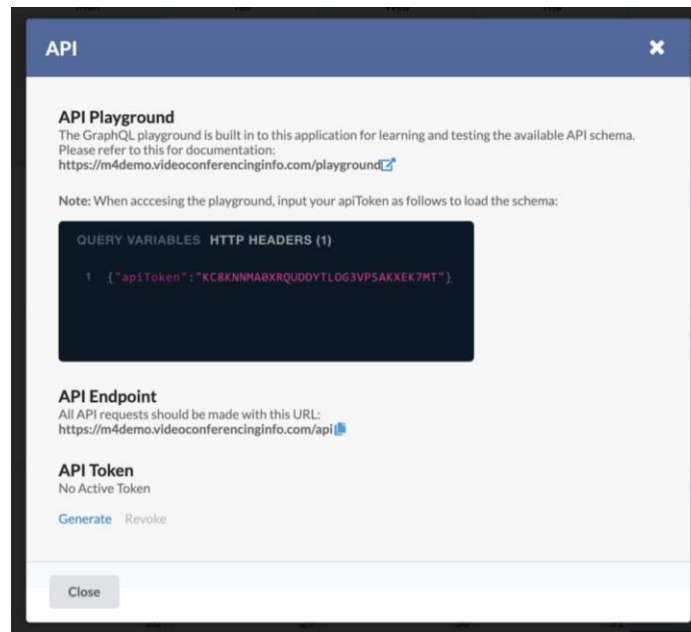
API

✓ Owner
✓ Admin
✓ Host

The API section allows you to generate API tokens for use with integrations.

- **API Playground:** Discover and test the available schema and API calls.
- **API Endpoint:** The endpoint for your account for all API requests.
- **API Token:** Use the token to authenticate API requests.

    - **Generate:** Create a new token.
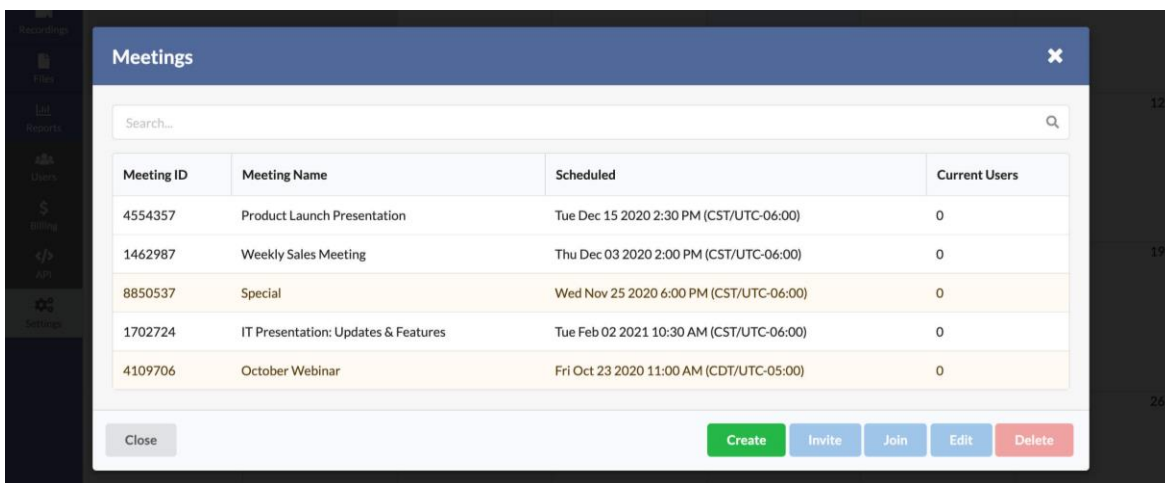   - **Revoke:** Delete the existing token (cannot be undone).

Meetings_____

✓ Owner
✓ Admin
✓ Host

The Meetings section allows you to view a list of your scheduled meetings.

- **Create:** Create a new meeting.
- **Invite:** Open the Invitations window for the selected meeting.
- **Join:** Join the selected meeting now.
- **Edit:** Change/Update the selected meeting.
- **Delete:** Delete the selected meeting.

Create Meeting:

Details:

- **Meeting Name:** Title of your meeting that is displayed on your calendar and Email Invitations.
- **Start Date / Time:** When your meeting will start.
- **End Date / Time:**
  - Meetings that reach their end time are locked and cannot be joined unless a Repeat cycle is also set for the meeting.
    - Meetings with a Repeat cycle remain active until manually deleted or they are unused for 6 months.
  - An inactive meeting can be reactivated by editing the start and end date and time.

- **Time Zone:** Choose the Time Zone for your meeting.
- **Repeat:** Choose how often your meetings will repeat.
  - Every Day
  - Every Week

- **Every Month**
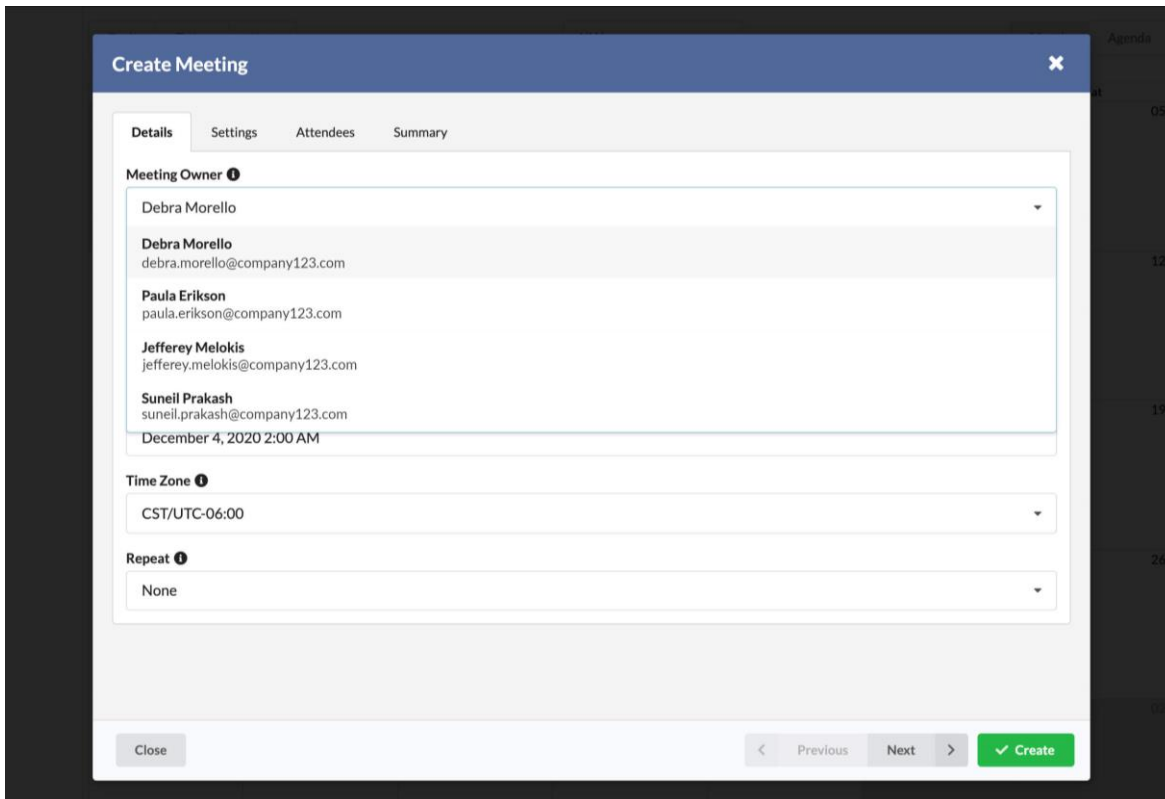

- **Meeting Owner:** The Owner and Admins can create meetings for different users on the account.

- Click the **Next** button to go to the Settings tab.

Settings:

- Meeting Types:
  - **Video Conference standard:**
    - Video conference for up to 20 users.
    - The meeting link is public and can be shared.
    - All users have access to audio and video streaming.
  - **Video Conference secure:**
    - Standard video conference with secure access enabled.
    - Users must be added to the Attendees tab during meeting creation.
    - Each user will receive a unique link and key for accessing the meeting.
    - Each user can be configured with specific permissions.
  - **Webinar open:**
    - Webinar configured for up to 200 attendees.
    - The Host and Moderators are able to stream audio and video.
      - Users added to the Attendees tab with the Moderator permission have Host capabilities.
    - An open webinar has a single link to share with all guests.
  - **Webinar with registration:**
    - Webinar configured for up to 200 attendees.
    - The Host and Moderators are able to stream audio and video.

- Users added to the Attendees tab with the Moderator permission have Host capabilities.
        - Guests must register prior to receiving their link to join the webinar.
            - Each guest receives a unique link after registering to your webinar.
    - **Classroom:**
        - Special video conference configuration that allows the Instructor (Host) to see all students (Guests) video streams.
   - Students only see the Instructor and do not see the other students' video streams.
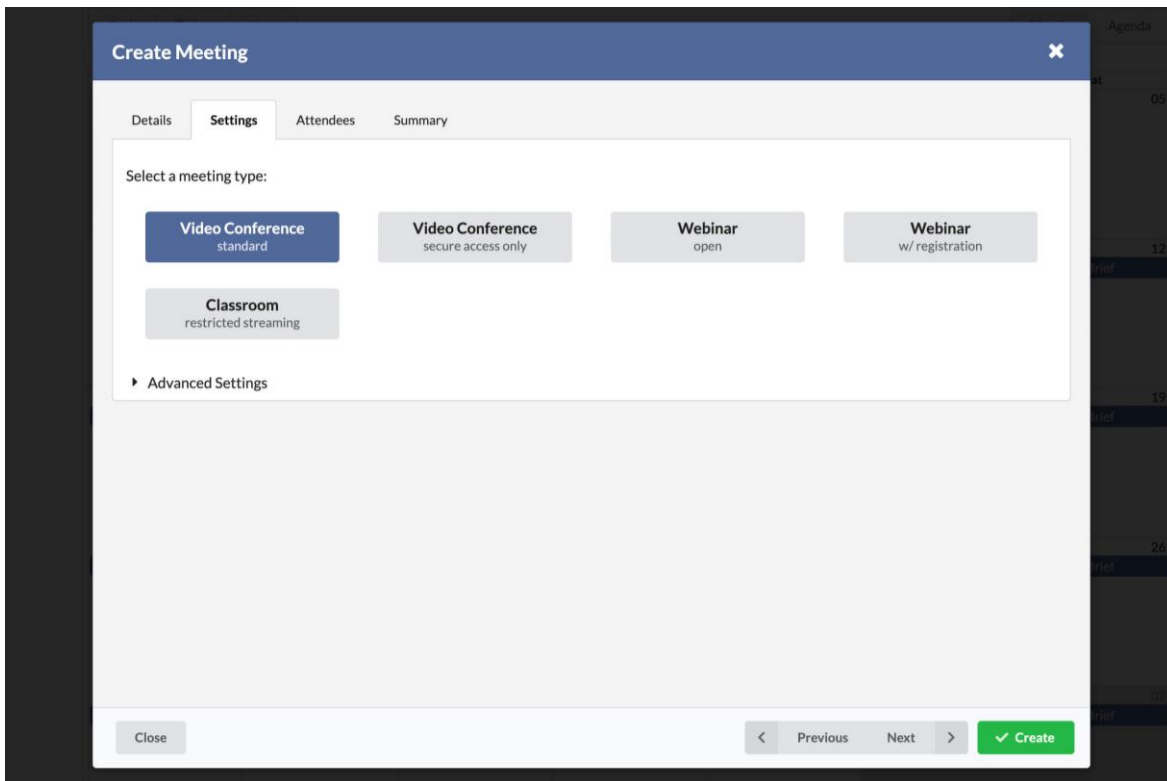
Advanced Settings:

- **Meeting Chat:**
    - **Open:** Public and Private chat is available to all users.
    - **Restricted:** Chat is limited to Host-to-Guest and Guest-to-Host.

- **Meeting User List:**
    - **Open:** Names of all participants are visible in the user list.
    - **Restricted:**
        - Hosts can see the full list of participants (Guests and other Hosts) in the user list.
        - Guests can only see the Host(s) names in the user list.
    - **Hide Automatically:** User list hides after a few seconds upon joining the meeting.

- **Meeting Security:**
    - **Open:**
        - Anyone can join the meeting using the Meeting ID or link.

- o Meeting is capped at 20 users unless Disable Video and Disable Audio are both checked under Guest Restrictions.
  - ▪ **Secured:**
    - o Each user requires their own access Key to join the meeting.
    - o Add users in the Attendees tab during meeting creation.
  - ▪ **Registration:**
    - o Used for collecting webinar guest names and email addresses.
    - o Guests must register in order to receive a link to join your webinar.
    - o Hosts, presenters, and chat moderators should be added in the Attendees tab.
  - ▪ **Waiting Room:**
    - o Before joining your video conference or webinar, your guests will be placed in the Waiting Room.
    - o A Host must manually allow guests to join the meeting.

- **Default Behavior:**
  - ▪ **Notes:**
    - o The Default Behaviors apply to all users who join with ability/permission to stream audio and video.
    - o In Video Conferences, it is common to start with Camera and Microphone on by default.
    - o In Webinars, it is common to start with Camera and Microphone for the Host(s) off by default.
  - ▪ **Turn Microphone on Automatically:**
    - o Users will join the meeting with their microphones turned on.
  - ▪ **Turn Camera on Automatically:**
    - o Users will join the meeting with their webcams turned on.
  - ▪ **Tile Layout:**
    - o All video images are the same size and change size depending on how many total participants are connected to your meeting.
  - ▪ **Speaker Layout:**
    - o One large video image appears in the center of the screen.
    - o The large video image changes depending on who is speaking.
  - ▪ **Large Meeting:**
    - o Use this setting for meetings that will have 8 or more camera images.

- **Guest Restrictions:**
  - ▪ **Notes:**
    - o Restrictions apply to all guests who join an open meeting using the Meeting ID.
    - o Guests who join with a Key will override the Guest Restrictions.
    - o For webinars, it is common to disable most Guest Restrictions and invite additional speakers, presenters, and chat moderators from the Attendees tab.
    - o Disable Video, Disable Audio, and Disable Screen Sharing are required for a webinar.
  - ▪ **Restrict Guest-to-Guest Streaming:**
    - o Special video conference configuration that allows the Instructor (Host) to see all students (Guests) video streams.
    - o Students only see the Instructor and do not see the other students' video streams.
  - ▪ **Disable Video:** Prevents Guests from turning on their webcams.
  - ▪ **Disable Audio:** Prevents Guests from turning on their microphones.
  - ▪ **Disable Screen Sharing:** Prevents Guests from using the screen share feature.

- **Disable Web Video Player:** Prevents Guests from using the Web Video Player.
- **Disable Chat:** Prevents all chat for guests, including Guest-to-Host chat.
- **Disable File Upload:** Prevents guest from uploading files to the meeting.
- **Disable File Download:** Prevents guest from downloading files to the meeting.
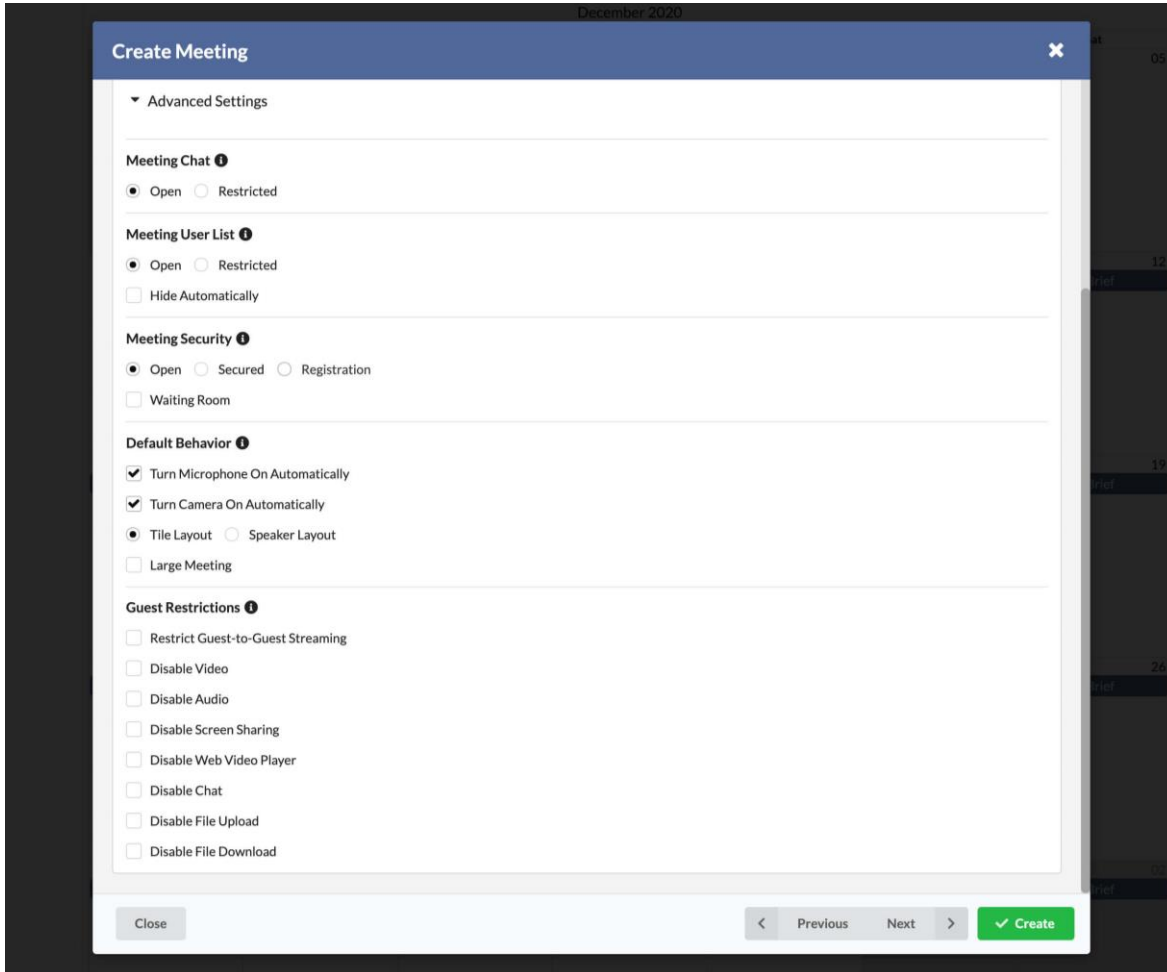
- Click the **Next** button to go to the Attendees tab.

Attendees:

- **Notes:**

  - Each user added to Attendees receives a unique link with a Key for meeting access.
  - Attendees must be added for Secure Meetings.
  - For Webinars, add additional speakers, presenters, and moderators to Attendees.
  - For Webinars, it is recommended to leave Disable File Download unchecked. This will allow guests to download any Meeting Files, like handouts or forms.

- Click the Add Guest button to add an Attendee.
  - Click the **Add Host** button to add an additional speaker or presenter.

- Users added with this button get the **Moderator** permission by default.
- The Moderator Permission should only be given to Attendees to use Host features:

  - Start Recording
  - Kick Users

- Type a user's Name and Email Address.
- Select the user's Permissions:
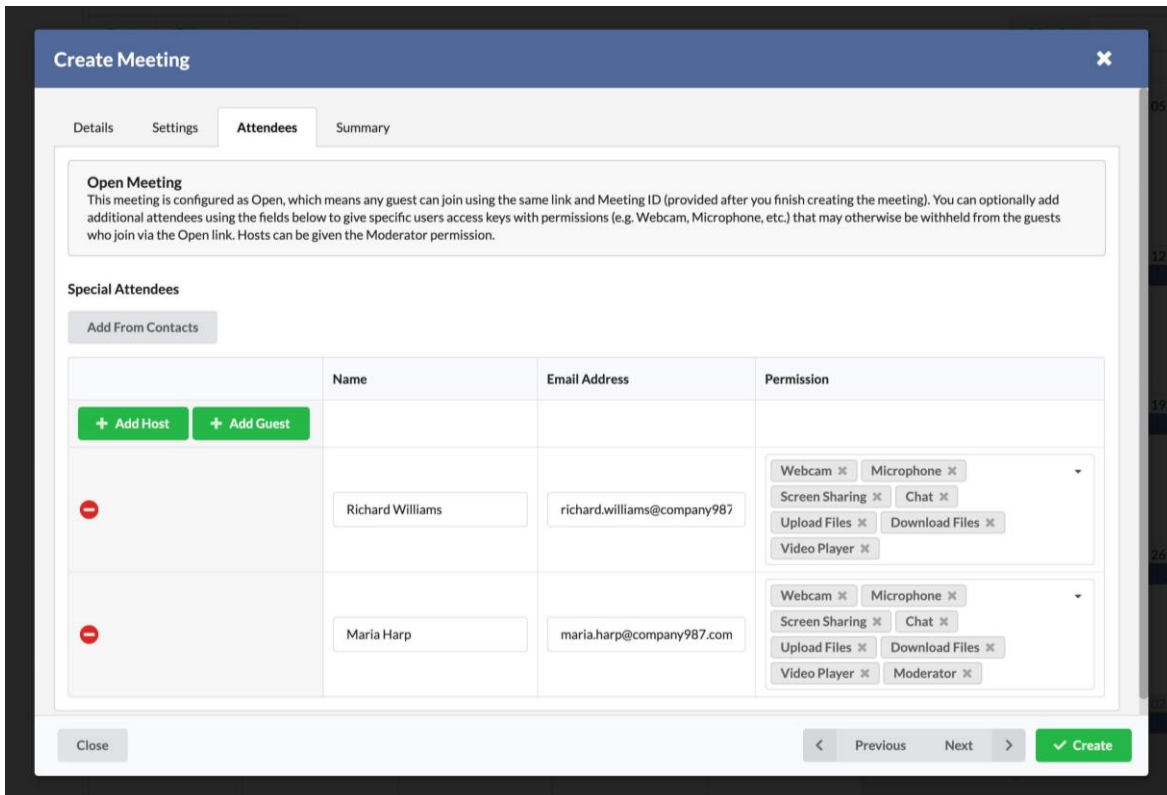
- Click the **Next** button to go to the Summary page or...
- Click **Create** to finish setting up your meeting.
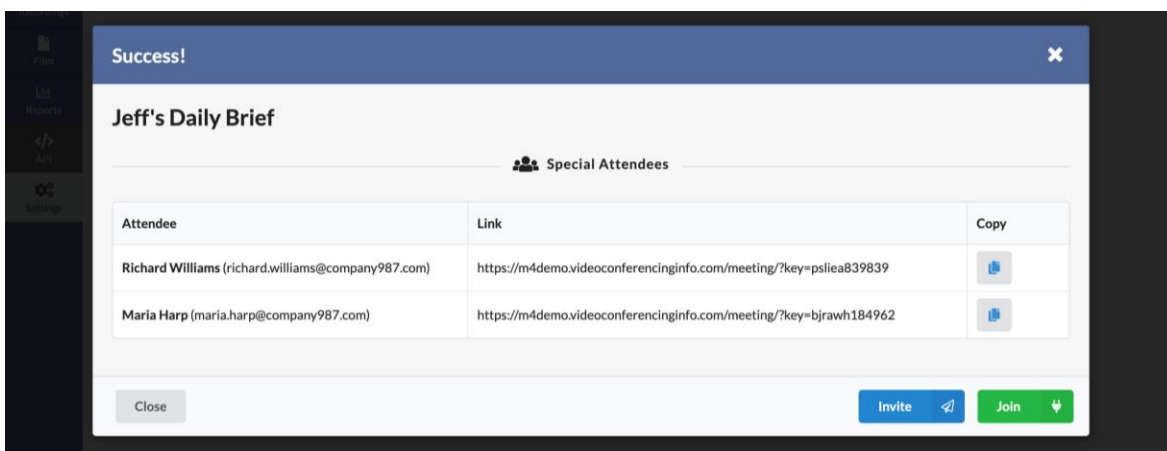
- Click the **Invite** button to send Invitations to your Video Conference or Webinar.
  - Jump to Invitations.
- Click **Join** to Join your meeting now. Enter your name on the next screen.
  - Jump to Join Meeting.

Edit Meeting:

The Edit Meeting feature allows you to makes changes to an existing meeting. You can change the Meeting Name, Date/Time, Advanced Settings, and the list of Attendees.
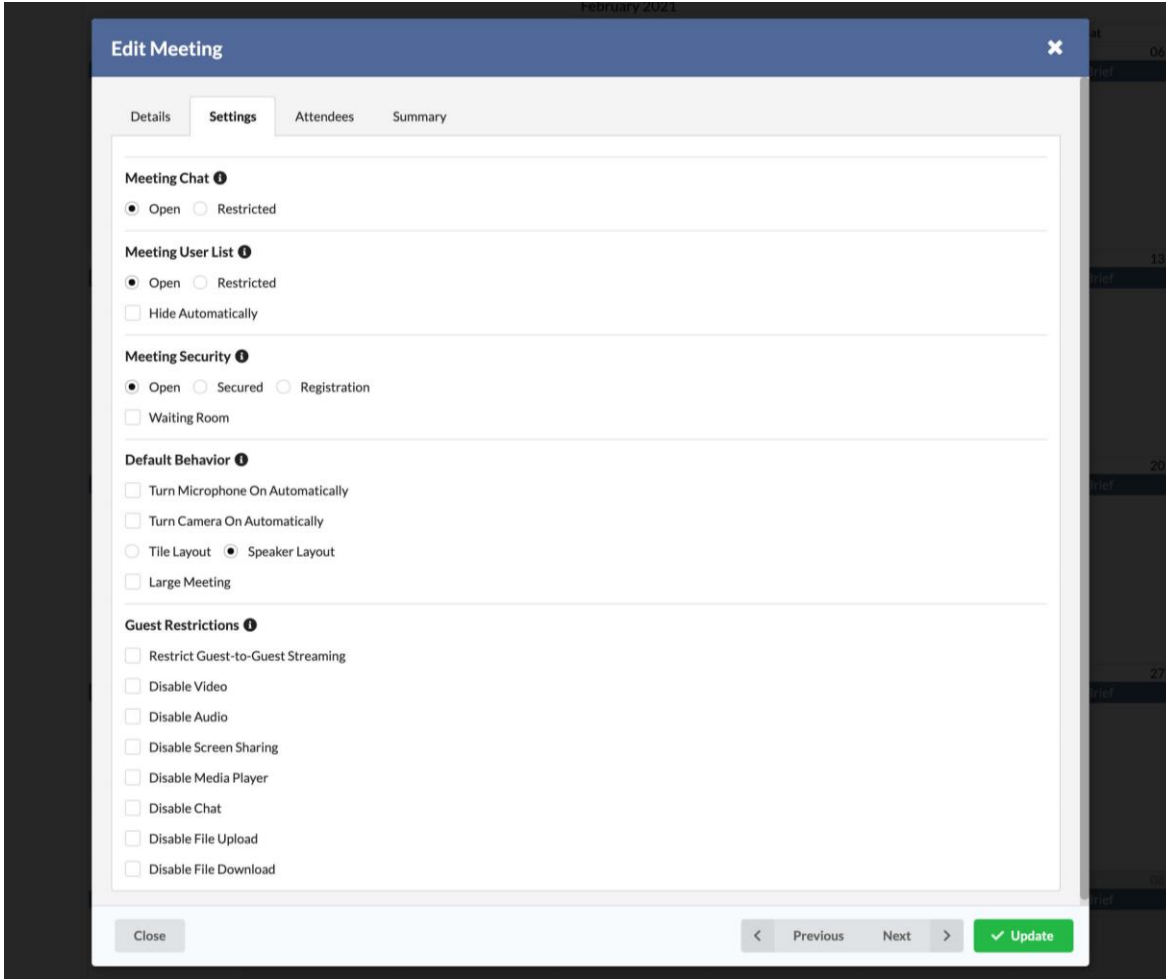
- Details:

- Settings:

- Attendees:
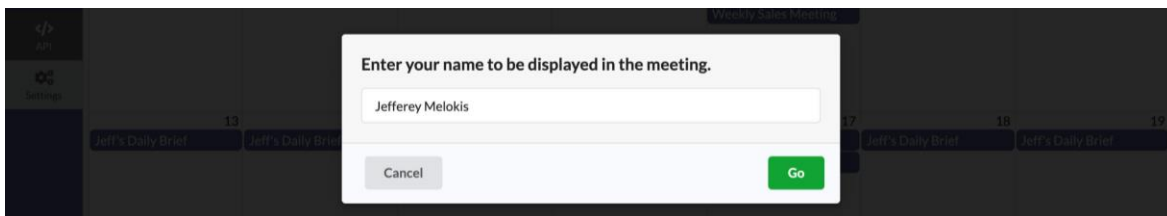

- Click **Update** to confirm your changes.

[Join Meeting](#):

The Join Meeting feature allows you to instantly connect to the live meeting room from here with Host privileges.
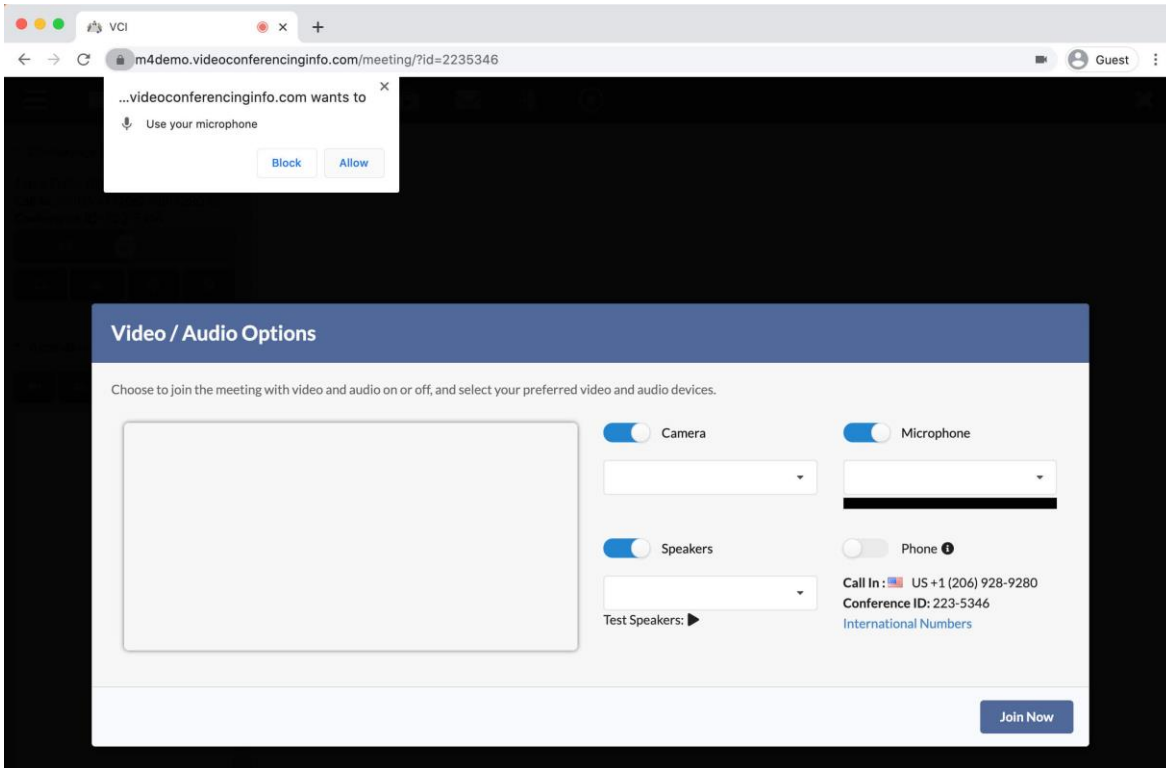
- Click on a meeting from the calendar or Meeting's list.
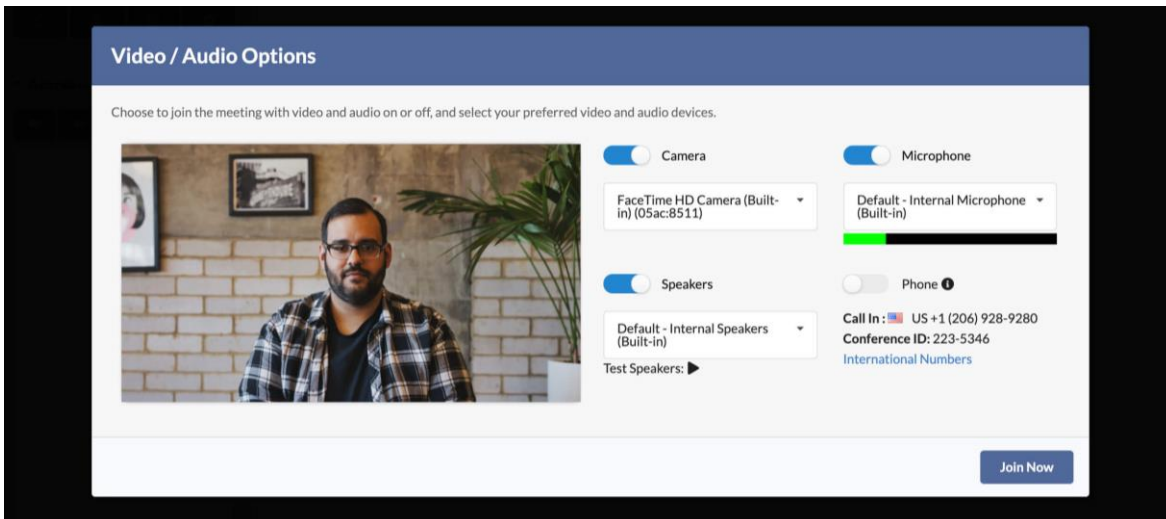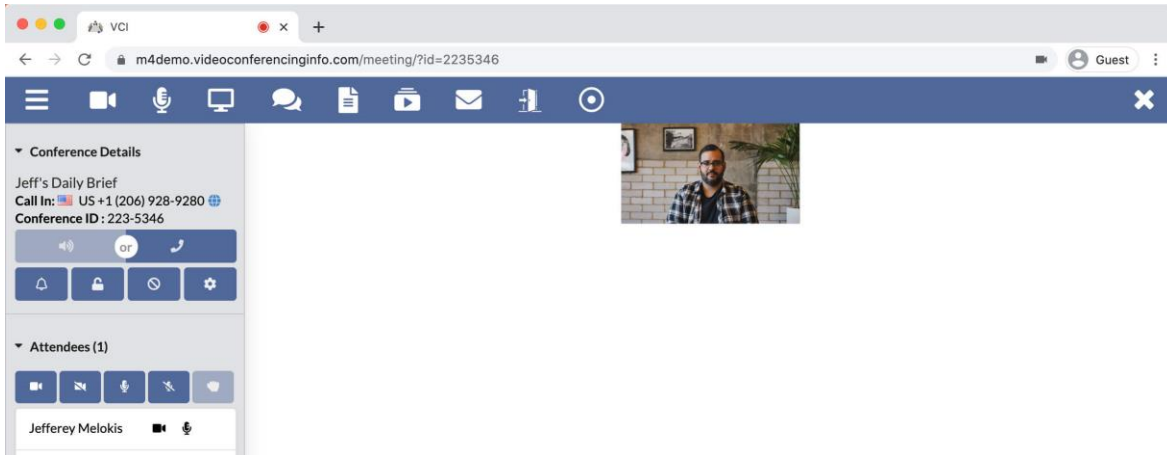- Then click **Join**.
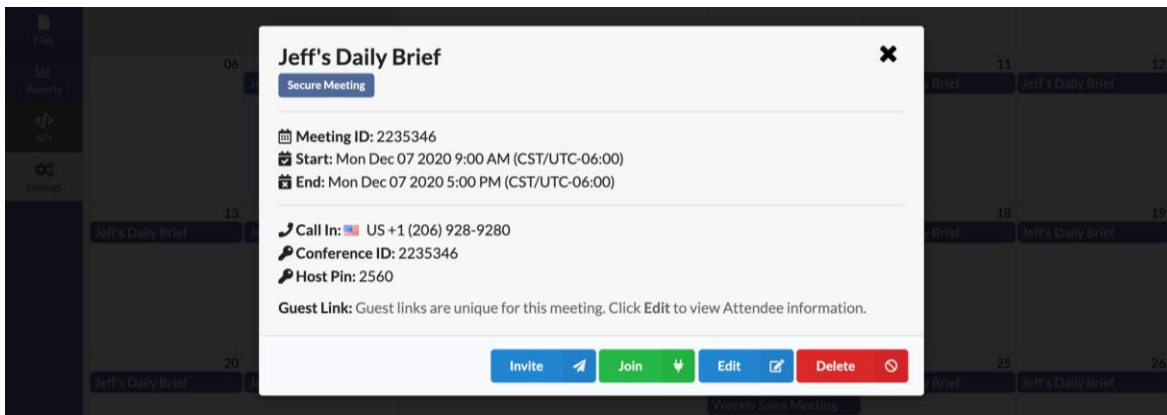
- Enter your name and click **Go**.

- Allow the camera and microphone access to your web browser.

- Preview and select the correct hardware.
- Click **Join Now** to load the meeting.

Delete Meeting:

The Delete Meeting feature allows you to end a particular meeting and prevent further access.

- Once deleted, the meeting and all associated access keys and links are erased and cannot be recovered.
- Once deleted, the meeting's name can be reused for another meeting.
- **Note:** It is highly recommended that you delete meetings that are no longer in use to prevent unintended usage on your account.
- Select a meeting from the calendar or Meeting's list and click **Delete**.
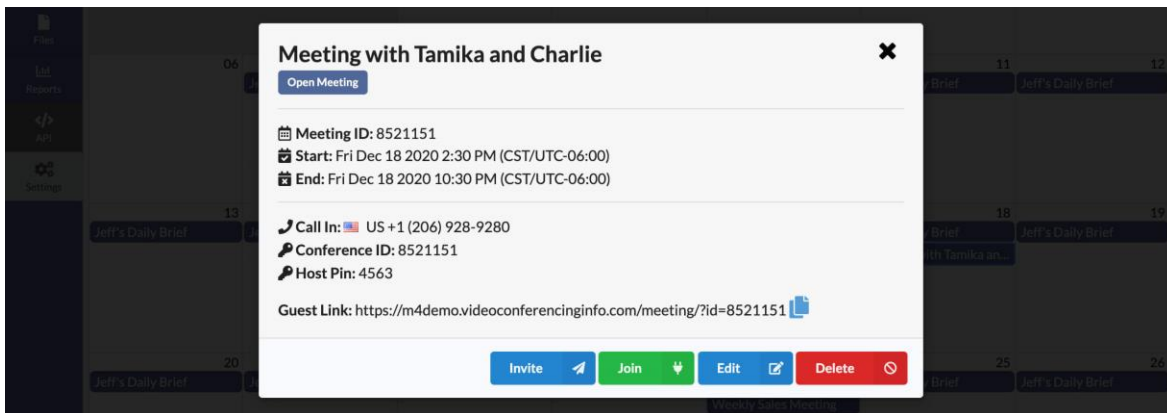
- Click **End** on the next screen to confirm deletion.
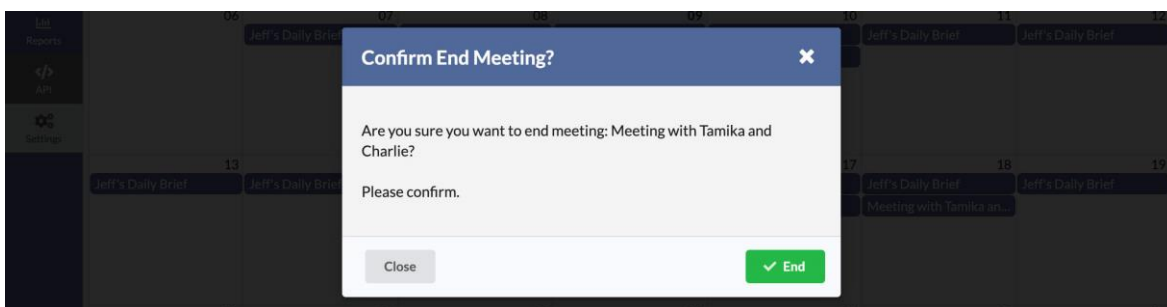
Invitations

- ✓ Owner
- ✓ Admin
- ✓ Host

Send your participants an email invitation or a text with your meeting link.

- **Open Meetings:** Email or text your meeting link to your participants.
- **Secure Meetings:** Email each user their own unique link.
- **Open Webinars:** Email or text your webinar link to your participants.
- **Webinars with Registration:** Email or text the registration link to your participants.
- **Open Meetings with Special Attendees & Webinars with Special Attendees:** Email or text your open link to your participants. Email secure links to the Special Attendees.

- Click on **Invitations** from the panel on the left of your Account Dashboard.
- Select a meeting from the drop-down menu.
- If you have just finished creating a meeting, then it will already be selected in the drop-down menu.
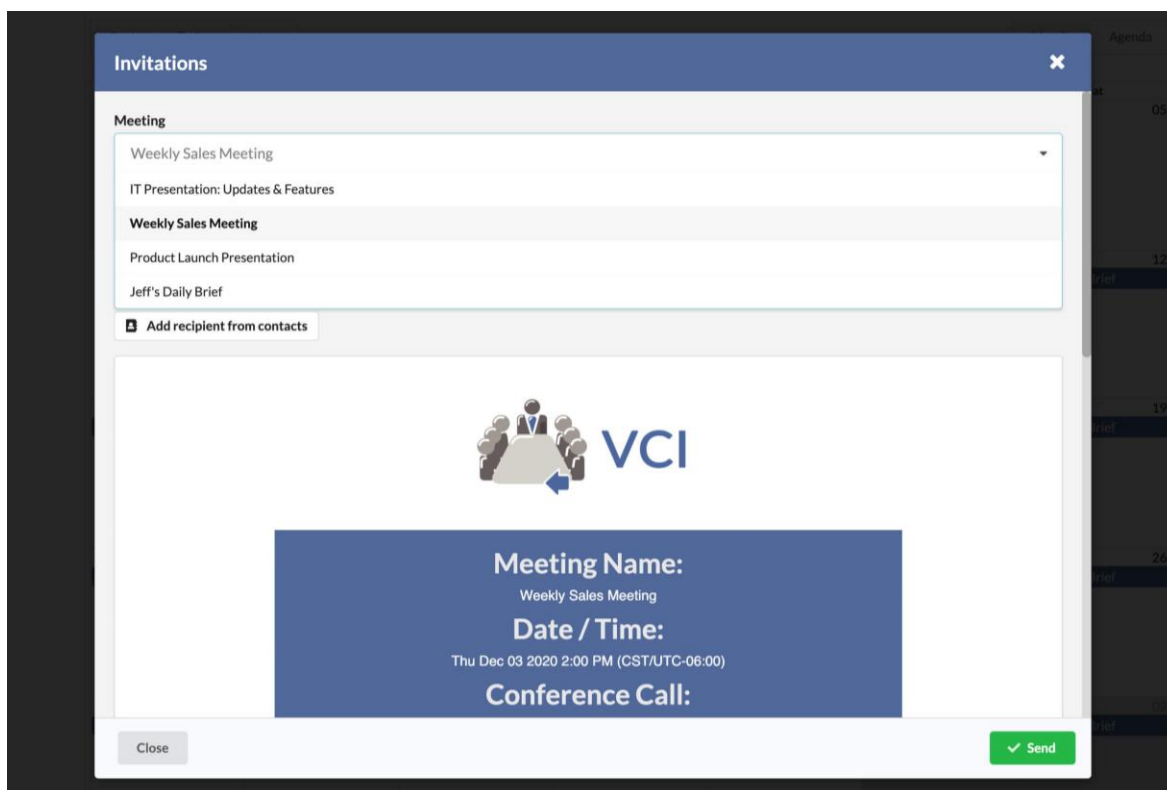

- **Open Meetings:** Send either email invitations or text your meeting link.
  - Enter email addresses of your participants.
    - Separate email addresses with a comma.
 - Click **Send**.
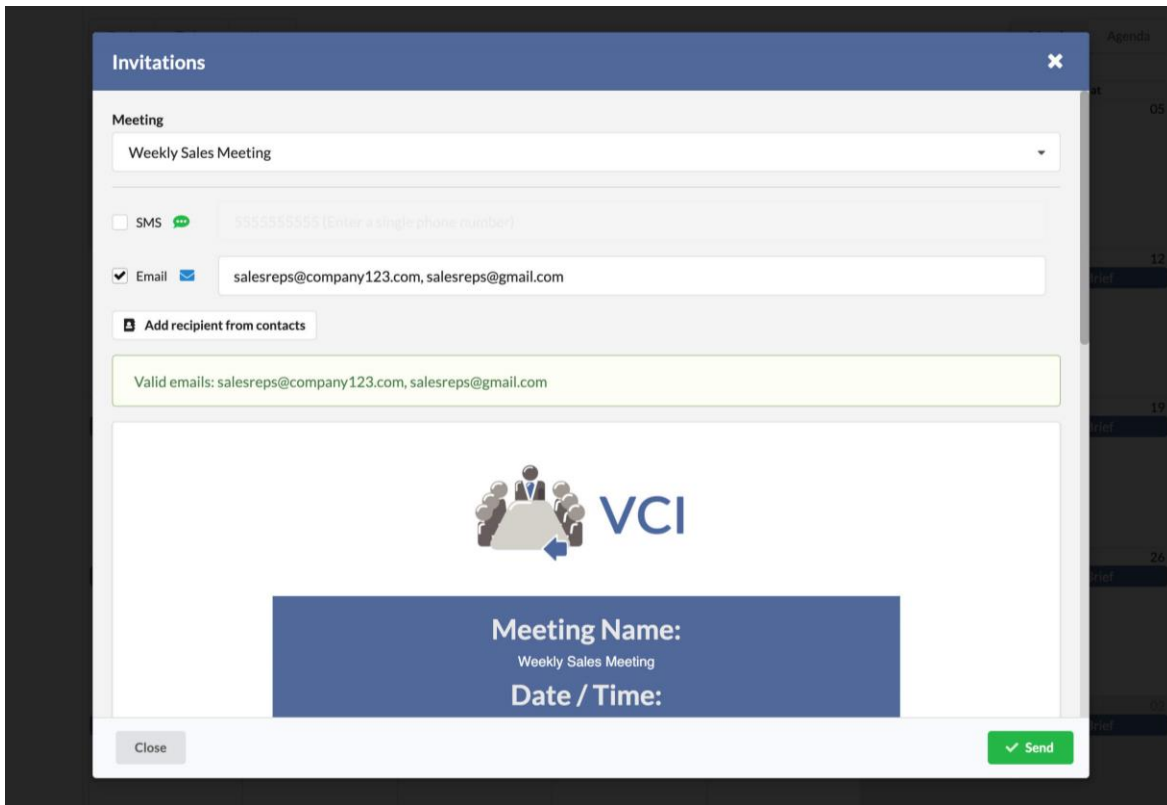
- **SMS:** Send a text to your participant.

    - Texts can only be sent one to Open Meetings.
    - Texts can only be sent to one participant at a time.
    - Enter the cell phone number of your participant and click **Send.**
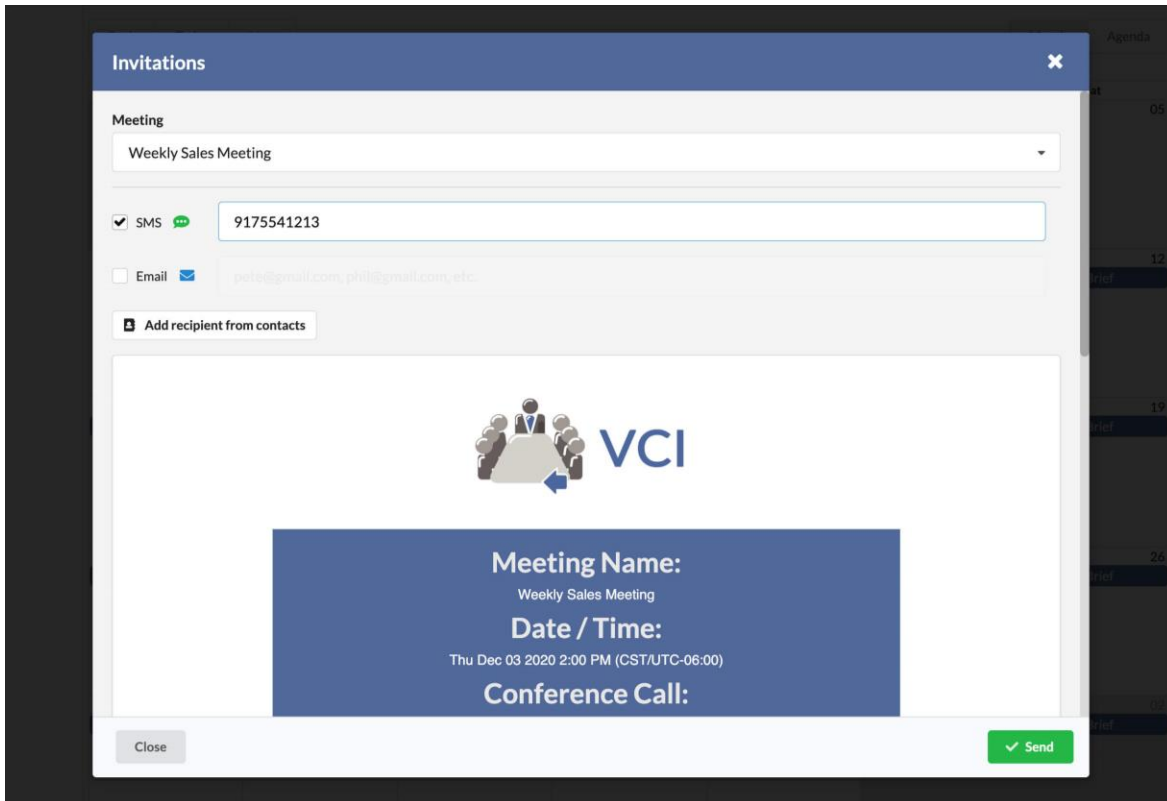
- **Secure Meetings:** Attendees receive the invitation with their access key.

  - You'll see the list of users who have been added to your meeting listed in the Invitations window.
  - Remove users if necessary.
  - Click **Send.**
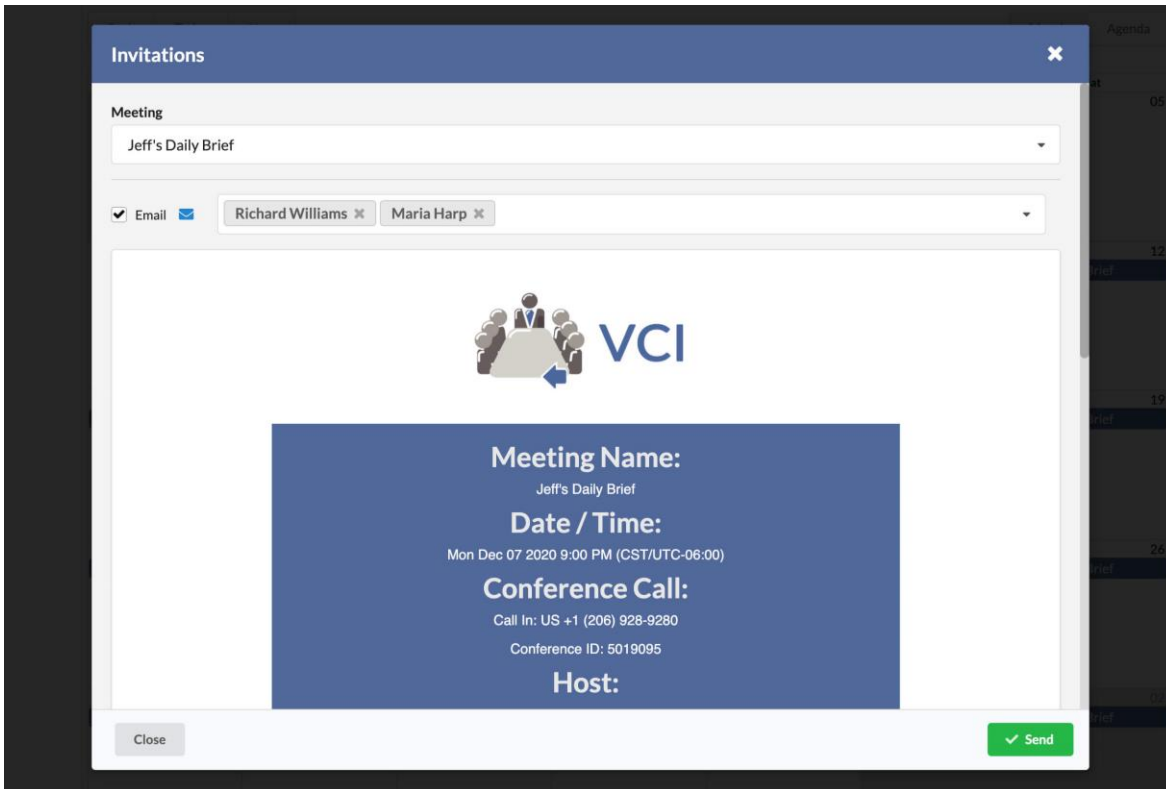
- **Webinars with Registration:** Send your webinar audience a link to the Registration page.
    - Enter their email addresses and click **Send.**
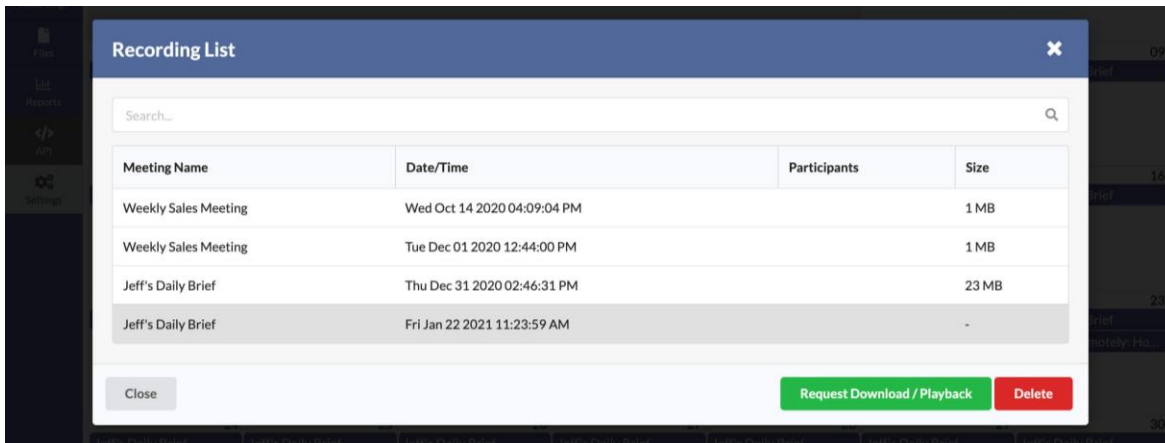   - Separate email addresses with a comma.
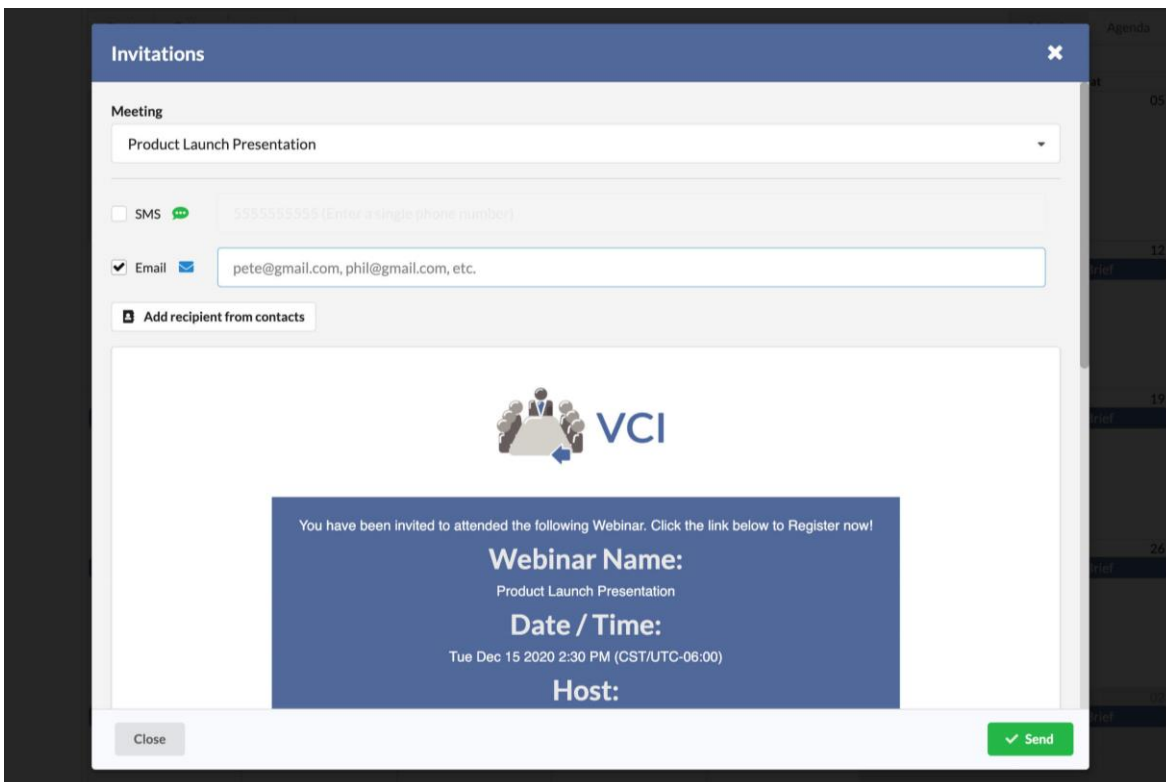
Recordings _____

✓ Owner
✓ Admin
✓ Host

The Recordings section shows you a list of previously recorded Meetings and Webinars.

- Click on **Recordings** on the left side of your Account Dashboard.
    - The **Owner** and **Admins** on the account have access to all recordings.
    - **Hosts** have access only to their own recordings.

- Select a recording from the list:

    - **Request Download/Playback:** Click Request to retrieve your recording.

        o This step is required before accessing any recordings.
        o Check back after a few minutes to see the process of your request.
        o Once the recording has been processed, additional buttons to download and play your recording will appear.
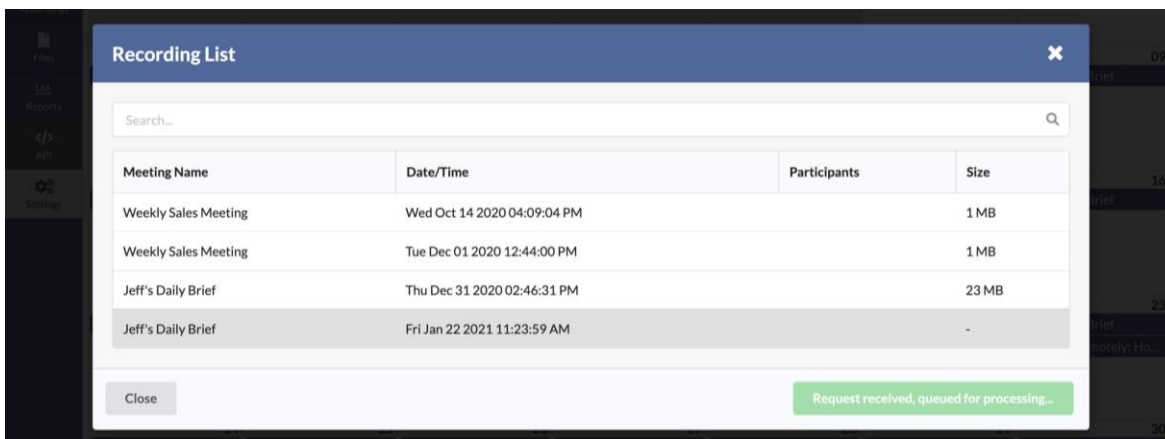
- **Play:** Opens the recording in your web browser so that you can view it immediately.
- **Download:** Download an MP4 file of your recording to your computer.
- **Copy:** Copy either the Download or Playback Links to share with other people.
- **Delete:** Delete the recording (cannot be undone).

Reports

✓ Owner
✓ Admin
✓ Host

The Reports section allows you retrieve account data.

▪ Click on the Reports icon on the panel in your Account Dashboard.
▪ **Usage Report:** Find out historical data about meetings. You'll be able to see who joined meetings, what times they joined and left, and information about their connection.
▪ **Invitation History:** Find out the status of your Email Invitations.
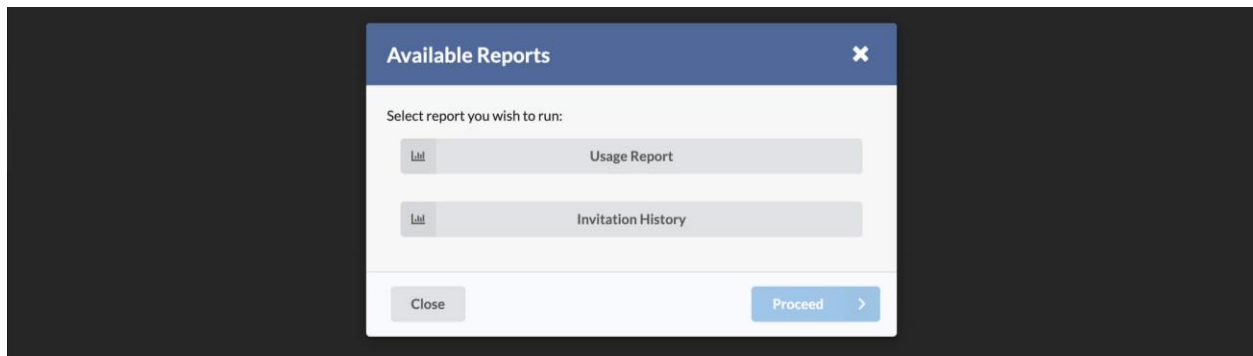
Usage Report:

- **Filter by Date Range:** Select from presets like "this week" and "last week" or select a custom date range.
- **Filter by Login:** Owners and Admins will be able to filter results by particular logins on the account.
- **Filter by Status:** Filter between active and inactive meetings. If you're unsure, select **Both.**
- **Select Meeting(s):** Choose one or a several meetings from the list to narrow your search.
  - **Select all meetings:** Check to see data for all meetings on your account.
- **Run Report:** Click the **Show Meeting Usage** button to see your results.

- When you have your results, you can either export to CSV or PDF files.

Invitation History:

- **Filter by Date Range:** Select from presets like "this week" and "last week" or select a custom date range.
- **Filter by Delivery Status:** Choose between Delivered Invitations and Bounced and Pending Invitations. Select **Both** to combine your results
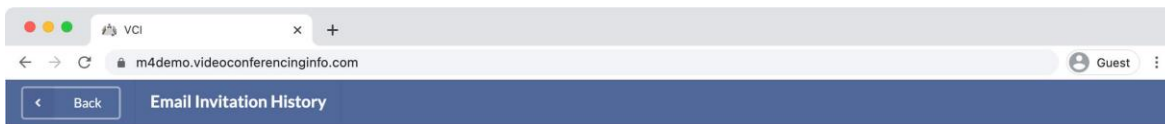- **Run Report:** Click the **Show Invitations History** button to see your results.

Email	Sent Date/Time	Result	Meeting ID	Meeting Name
astaal@attendees.com	Wed Oct 14 2020 21:51:44 +0000	Bounced	4109706	October Webinar
larusa.jac@attendees.com	Wed Oct 14 2020 21:52:28 +0000	Bounced	4109706	October Webinar
mikhail.beard@gmail.com	Wed Oct 14 2020 21:54:08 +0000	Delivered	2099265	Weekly Sales Meeting
kim.fountain@gmail.com	Wed Oct 14 2020 21:54:08 +0000	Delivered	2099265	Weekly Sales Meeting
mikhail.beard@gmail.com	Fri Nov 20 2020 18:38:37 +0000	Delivered	1702724	IT Presentation: Updates & Features
emma.spyers@gmail.com	Fri Nov 20 2020 19:40:11 +0000	Delivered	1702724	IT Presentation: Updates & Features
kim.fountain@gmail.com	Thu Dec 03 2020 23:59:14 +0000	Delivered	1462987	Weekly Sales Meeting
jay.bright@gmail.com	Fri Jan 22 2021 16:24:25 +0000	Delivered	8471031	Working Remotely: How to Develop and Maintain Client Relationships
emma.spyers@gmail.com	Fri Jan 22 2021 16:24:50 +0000	Bounced	8471031	Working Remotely: How to Develop and Maintain Client Relationships
nathanael.wu@gmail.com	Fri Jan 22 2021 16:25:59 +0000	Delivered	8471031	Working Remotely: How to Develop and Maintain Client Relationships
eliza.ramsay@gmail.com	Fri Jan 22 2021 16:31:17 +0000	Delivered	8471031	Working Remotely: How to Develop and Maintain Client Relationships
raj.wilder@gmail.com	Fri Jan 22 2021 16:31:32 +0000	Delivered	8471031	Working Remotely: How to Develop and Maintain Client Relationships
raj.wilder@wilderaj.com	Fri Jan 22 2021 16:31:59 +0000	Bounced	8471031	Working Remotely: How to Develop and Maintain Client Relationships
shawn.simpson@gmail.com	Fri Jan 22 2021 16:32:20 +0000	Bounced	8471031	Working Remotely: How to Develop and Maintain Client Relationships

Files_____

- ✓ Owner
- ✓ Admin
- ✓ Host

The Files section allows you upload and manage documents and files for use during meetings and sharing with meeting participants.

- • Click on the Files icon on the panel in your Account Dashboard.
- • Select a file from the list to:

  - ▪ **Delete:** Deletes the file and cannot be undone.
  - ▪ **Share:** Allow specific people to have access to your file or share it with an entire meeting. When shared with a meeting, the file will appear in the **Meeting Files** list for that meeting and all participants will have access to the file. When shared with a specific user, the file will appear in that user's **Your Files > Shared with You** folder.
  - ▪ **Download:** Download a copy of the file onto your computer.

- • Click the **Upload** button to start uploading files to your account.
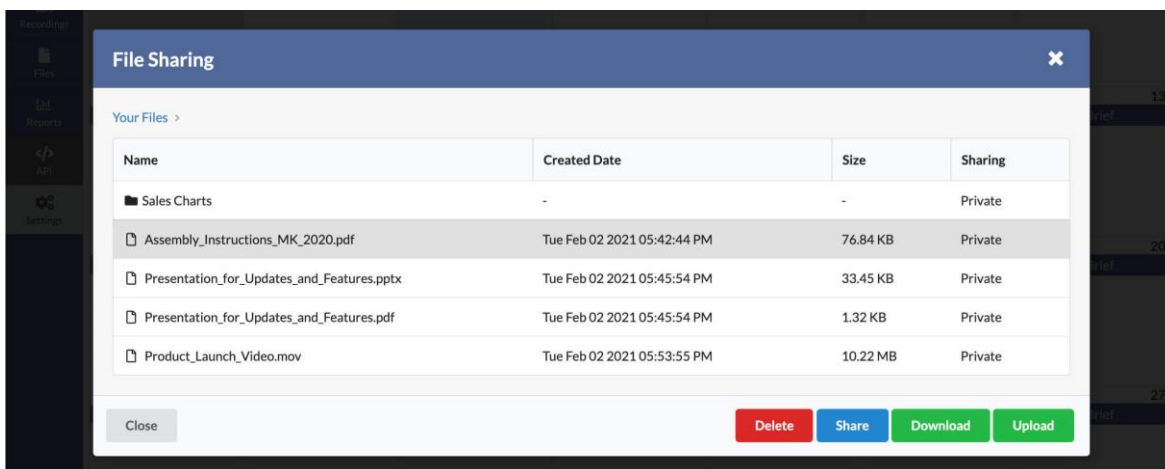
- • When Sharing a file, you can choose meetings from the left or individuals on the right.
- • Make your selection(s) and click on **Update Sharing**

Share
Assembly_Instructions_MK_2020.pdf

Share files with meetings and give read-only access to all users who join the meeting. Users can view or download the files.

Search Meetings... 📅

📅 **Quarter 4 Announcements**
Fri Oct 23 2020 11:00:11 -0500

✅ **IT Presentation: Updates & Features**
Tue Feb 23 2021 10:30:56 -0600

📅 **Weekly Sales Meeting**
Fri Dec 04 2020 14:00:53 -0600

📅 **Special**
Wed Nov 25 2020 18:00:30 -0600

📅 **Product Launch Presentation**
Tue Dec 15 2020 14:30:11 -0600

📅 **Jeff's Daily Brief**
Mon Dec 07 2020 21:00:24 -0600

📅 **Jeff's Daily Brief**
Mon Dec 07 2020 09:00:01 -0600

OR

Share files with users and give read-only access to the files. The user can view or download the file, and access it during meetings.

Search Users... 👥

👥 **Jaye Bright**
jay.bright@gmail.com

👥 **Emma Spyers**
emma.spyers@gmail.com

👥 **Nathanael Wu**
nathanael.wu@gmail.com

👥 **Eliza Ramsay**
eliza.ramsay@gmail.com

👥 **Raj Wilder**
raj.wilder@gmail.com

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✖ Cancel

➤ Update Sharing

Uploading Files

- How to upload files:

  - You can drag and drop files from your computer onto your browser to get them ready to upload or...
  - Click on the upload icon to browse for files instead.

- **Folder Options:** Click on **Create a New Folder** to upload your file(s) to a new folder.
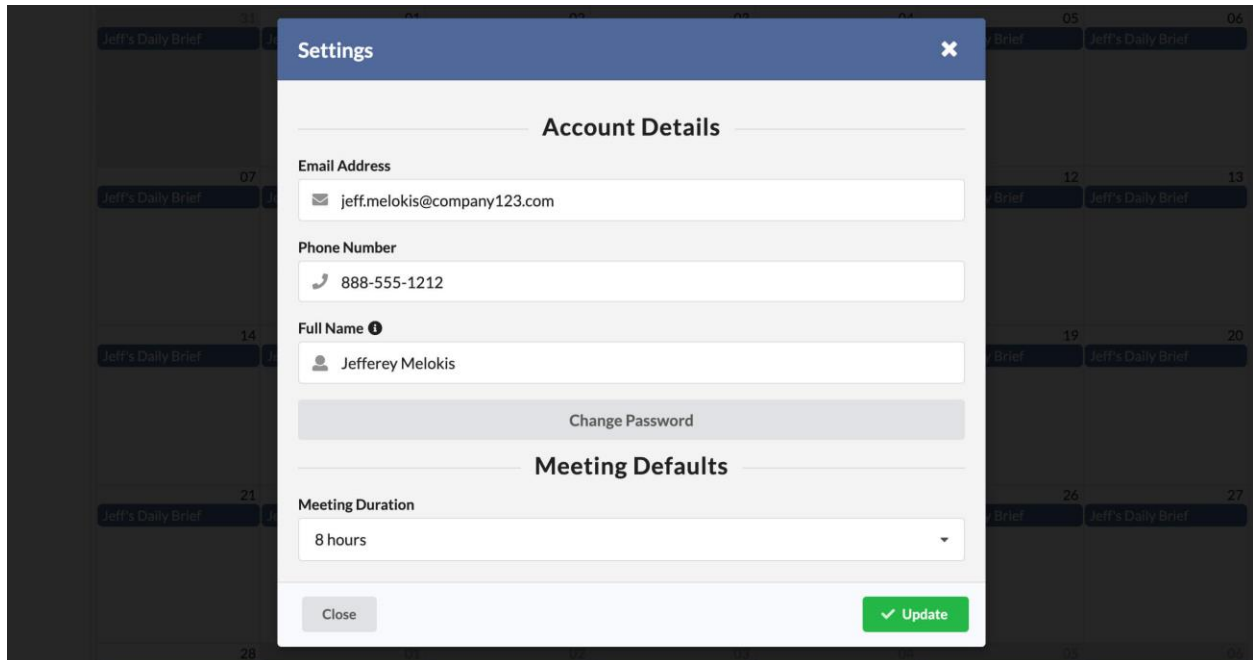- Click on **Upload Now** to upload your file(s).
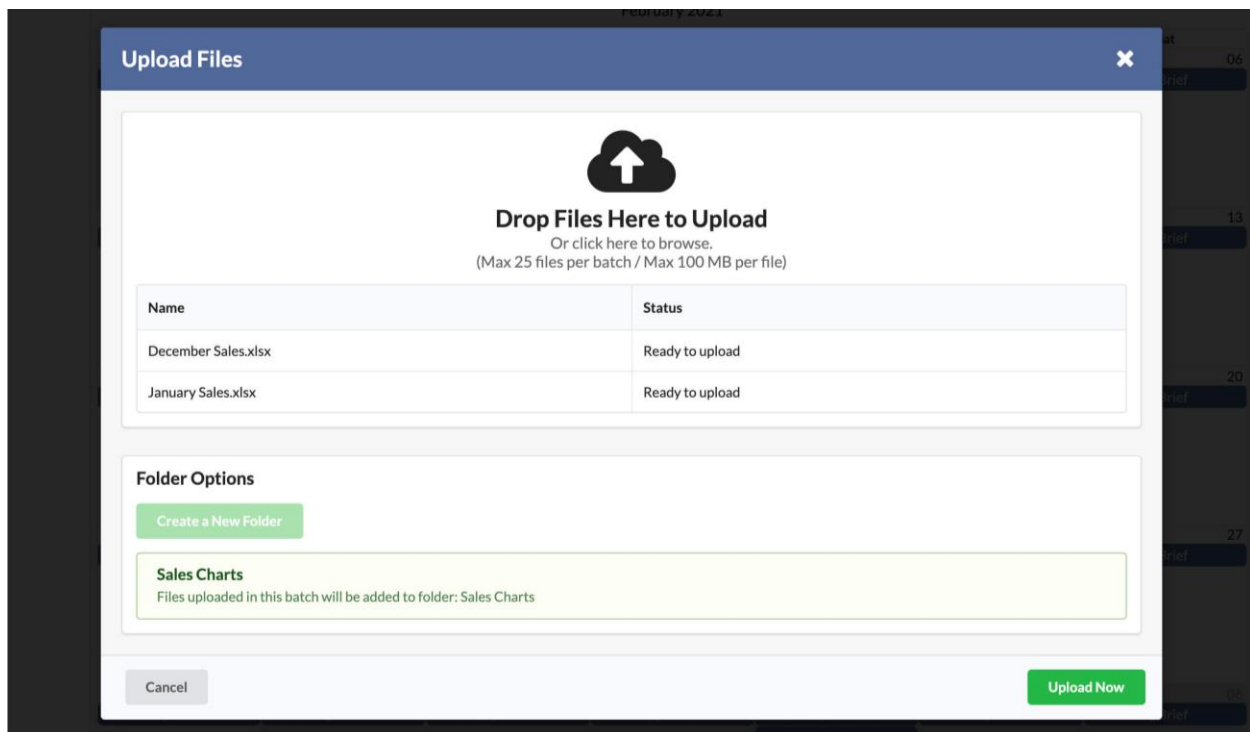
Settings_____

- ✓ Owner
- ✓ Admin
- ✓ Host

The Settings section allows you to change basic account details, login details, or branding settings depending on the user and account type.

- **Account Details:** Admins and Hosts can adjust their email address, phone number, and full name.

  - **Email Address:** Used to log into your account.
  - **Phone Number:** Used for internal contact purposes.
  - **Full Name:** Display name that appears in meetings, email invitations, etc.
  - **Meeting Duration:** Set the default duration for a meeting when you create it.

- **Owners** can also add the Company Name and Address.
- **Enterprise Accounts** have additional branding settings.
  - For a full explanation of each branding option, please use this link - Theme, Logo, and Custom Options PDF