

# USER GUIDE

# ACCESSION MEETING

Name:

Phone Number:

Extension:

Password:

VMail Pin:

## TRAINING VIDEO AVAILABLE

Please visit [www.yiptel.com](http://www.yiptel.com) then click **Resources, Training Center** then select **Other Products**. For additional questions, call or SMS to **(800) 752-6110** or email [myservice@yiptel.com](mailto:myservice@yiptel.com).

## TO DOWNLOAD

Open a web browser and go to [portal.yiptel.com](http://portal.yiptel.com). Enter your phone number (without dashes) and portal password then click Login. Navigate to the Apps menu and then click YipTel Desktop Meeting on the left and then download for your specific operating system. From here, you can choose to download the Outlook Plugin as well. This will allow you to start and schedule meetings straight from Outlook.

### Apps on your

## Computer

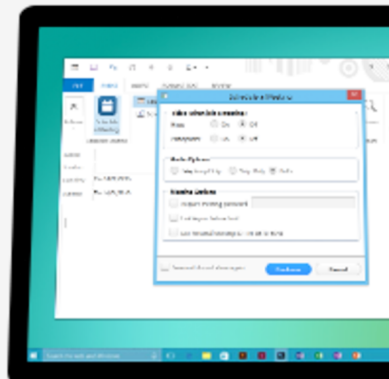
### Yiptel Desktop Meeting - Outlook Plugin

Create and schedule online meetings from within Outlook.

*Works with Outlook 2010 or higher (2007 with limited features)*

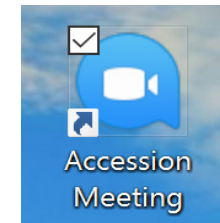
*You must have Yiptel Desktop Meeting installed and logged in to use.*

 **Windows 7 / Windows 8 / Windows 10**



## TO LAUNCH

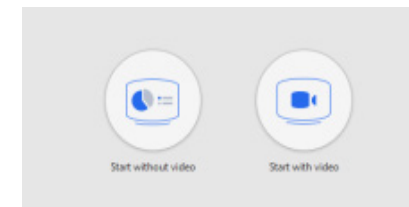
Select the Accession Meeting icon either from your desktop or your start menu. If asked, select **YipTel** as your provider and then enter your phone number and portal password to login.



## HOME SCREEN:

## TO HOST AN ON-DEMAND MEETING

Click either Start without video or Start with video. The only difference in these options is whether your video will display at the start to other participants or not. You can always turn this on or off at any point in your meeting.

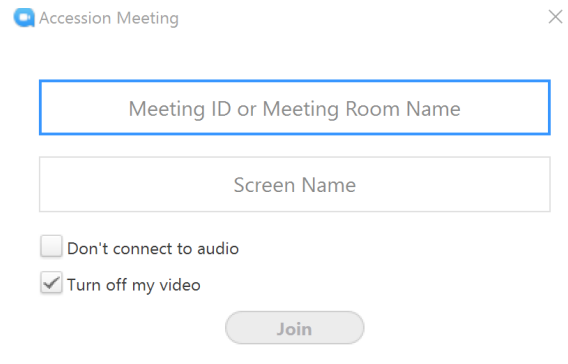


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## TO JOIN ANOTHER MEETING

Simply press Join. You will be asked for the Meeting ID and be given the option to change your Screen Name. Similar to hosting a meeting, you can join with or without video and change that at any point.



Accession Meeting

Meeting ID or Meeting Room Name

Screen Name

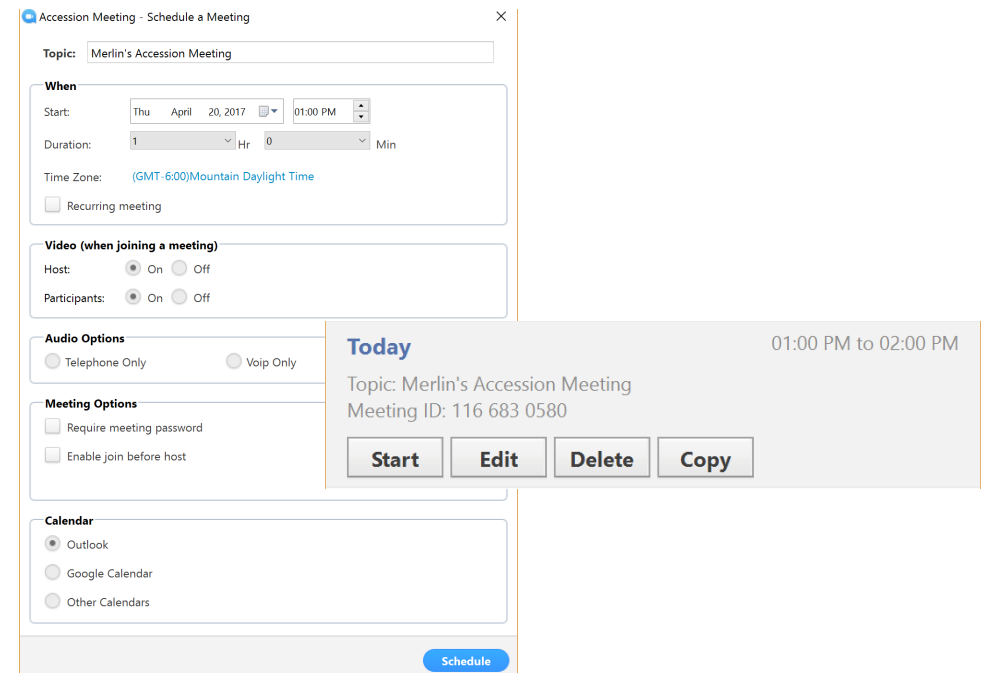
Don't connect to audio

Turn off my video

Join

## TO JOIN ANOTHER MEETING

Simply press Join. You will be asked for the Meeting ID and be given the option to change your Screen Name. Similar to hosting a meeting, you can join with or without video and change that at any point.



Accession Meeting - Schedule a Meeting

Topic: Merlin's Accession Meeting

**When**

Start: Thu April 20, 2017 01:00 PM

Duration: 1 Hr 0 Min

Time Zone: (GMT-6:00)Mountain Daylight Time

Recurring meeting

**Video (when joining a meeting)**

Host:  On  Off

Participants:  On  Off

**Audio Options**

Telephone Only  Voip Only

**Meeting Options**

Require meeting password

Enable join before host

**Calendar**

Outlook

Google Calendar

Other Calendars

**Today** 01:00 PM to 02:00 PM

Topic: Merlin's Accession Meeting

Meeting ID: 116 683 0580

Start Edit Delete Copy

Schedule

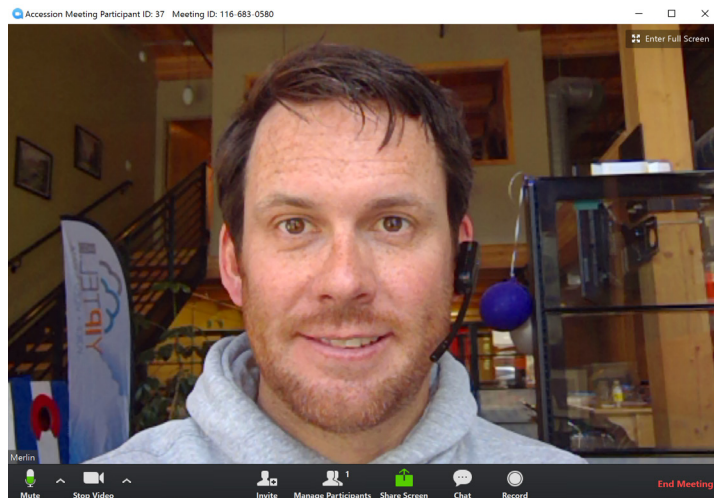
## SCHEDULE A MEETING

Select the Schedule button. Within the scheduling screen, enter the topic name, date, time, and intended duration. Then select which meeting options you would like to apply. Choosing a calendar option will generate a meeting request from which you can invite any number of participants. On the date and time of your meeting, locate the meeting under the Meetings tab, and select Start.

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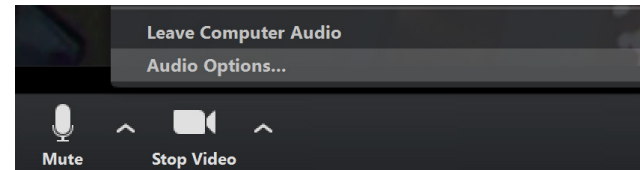
# ACCESSION MEETING

## MEETING WINDOW (Live)

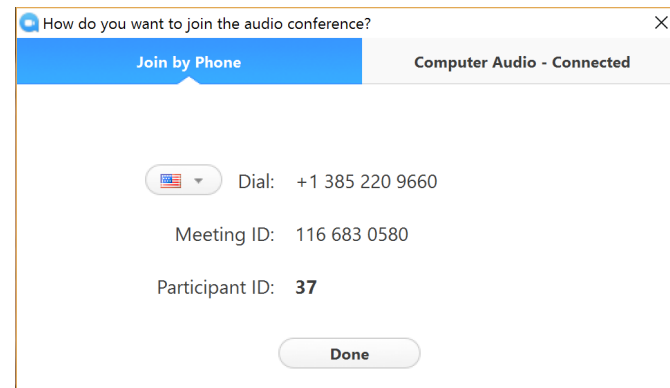


## AUDIO/VIDEO CONTROL

In the lower left hand side of your meeting window, you can easily mute your audio (microphone) or video (camera). You will see a red line through the icon if currently muted. By selecting the Up Arrow to the right of your microphone icon, you will find Audio Options.



From here you can choose to continue with your computer microphone/headset, or have the option to join by telephone. If you choose the dial-in option, be sure to enter the participant code listed. If successful, you will see a phone icon in the place of the microphone.

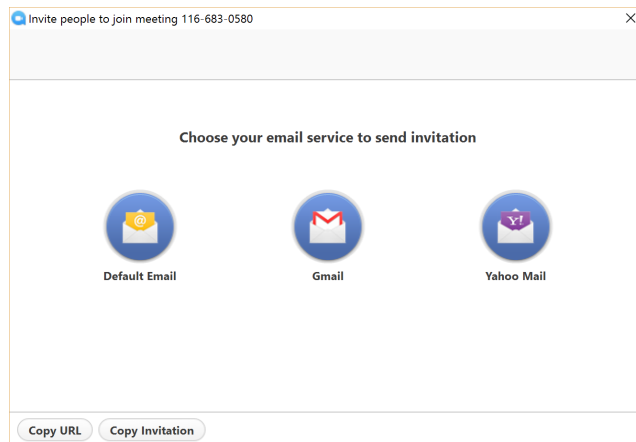


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## TO INVITE PARTICIPANTS

Select the Invite icon at the bottom of your meeting window. From here, you can choose to email your invitation or copy and paste the link. When the participant clicks the link, they will be joined into the meeting.



## TO MANAGE PARTICIPANTS

Clicking the Manage Participants icon will show your active meeting participants. From here, you can chat with participants, mute their audio, or remove them from the meeting. In the lower right-hand corner of the Participants window you can select More. This gives you additional options such as locking the meeting so no additional participants can join.



## SHARE YOUR SCREEN

Click the Share Screen icon. Choose to share your entire desktop or any specific window or application. You can also pull up a whiteboard for illustration purposes or share the screen of your compatible iOS device via Airplay.

\*note that in order for another participant to share their screen you will need to stop sharing yours and vice versa.

## TO CHAT

Selecting the Chat icon will allow you to initiate a group chat or have a side conversation with any specific participant. You can also initiate chat from the Participants window.

## TO RECORD

To record the current meeting, select the Record icon. All participants will be notified that the meeting is being recorded. You will also see "Recording..." in the upper left-hand portion of the meeting window. At any point you may pause or fully stop the recording. Once the meeting ends, the recording will automatically save to a local folder on the host's desktop.