

## NOTES ON USING GOTOWEBINAR

GoToWebinar organizers may hold Webinars for up to 1,000 attendees. The Webinar process can be broken into three stages: Webinar Planning, Webinar Presentation and Webinar Follow-up.

Organizers need to first log in to GoToWebinar and activate their GoToWebinar accounts before they can begin the Webinar setup process. For GoToMeeting Corporate plans, contact your company administrator if you don't have an account already.

### Webinar Checklist

- Schedule (date, time, topic)
- Customize Settings (branding, registration, polling, survey)
- Promote (registration report, secondary invitations/tailored messaging, reminders, follow-up)
- Practice
- Present
- Webinar Follow-up

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## SCHEDULE

1. Log in to [www.gotowebinar.com](http://www.gotowebinar.com).
2. Click **Schedule a Webinar** in the left navigation menu and a three-step *Schedule a Webinar* page will load.

**Step 1:** Webinar Details - Enter your Webinar Details and click **Save and Continue**.

**Step 2:** Branding and Theme - Brand your Webinar communications and Webinar Waiting Room with a theme and company logo. Preview your work and click **Save and Continue**.

**Step 3:** Registration - Customize your Webinar registration form and click **Save and Email me the Invitation**.

### Using GoToWebinar Total Audio Service

GoToWebinar includes an audio conference service at no extra cost to you. Choose between phone and Voice over Internet Protocol (VoIP) or allow both options. You can also include local toll dial-in numbers for European countries.

You may decide to use this service or choose another method of bringing audio to your online Webinars (click **Provide your own conference call number**).

**Note:** If you choose to use your own audio service provider for the audio portion of the Webinar, GoToWebinar will include your dial-in numbers with the Webinar information; however GoToWebinar audio features (such as VoIP and audio management) do not apply.

#### Choose Audio Conference Option [More Info](#)

##### GoToWebinar Audio Service:

VoIP only (requires microphone and speakers)

Telephone only

Both

-OR-

Provide your own conference call number

##### With GoToWebinar audio service:

Attendees can speak if un-muted by an organizer. Panelists and organizers are un-muted by default.

##### Includes local toll numbers for:

United States

[Add more countries](#)

## CUSTOMIZE or EDIT

Once a Webinar is scheduled, organizers can customize or edit additional aspects of the Webinar.

1. Log in to your account and scroll to the Webinar you want to customize or edit.
2. Click the *Change Session Settings* drop-down menu and select the feature you want to customize or edit.

## PROMOTE

### Invite Participants


After scheduling your Webinar, you will receive the Webinar Invitation in your email application.

1. Forward the Webinar Invitation to your attendees or to a third party, such as a list broker. You can also save the Webinar Invitation in an HTML format and post to your personal or company Web site.

If you make any changes to the Registration Form you will need to resend yourself the Webinar Invitation.

1. Log in to your account.
2. On the *My Webinars* page, scroll to the Webinar for which you want to receive the Webinar Invitation. To the right of the Webinar, click the **Email me the Invitation** link. The Webinar Invitation is sent to the email address on your account.

### Track registrations

1. Log in to your account.
2. On the *My Webinars* page, click  next to the Webinar date for which you want to view registrants.
3. Click **PDF**, **CSV**, **Excel** or **HTML** to download a registration report, or refer to the at-a-glance summary of registration statistics.

## PRACTICE

Before the day of your Webinar you should allow time to practice your Webinar and include any other Webinar organizers and/or panelists. The Practice feature allows organizers to run an unlimited number of practice sessions before the scheduled Webinar start time. All settings and customization made to a Webinar will apply to the practice session.

### Practice Your Webinar

1. Log in to your account.
2. On the *My Webinars* page, find the Webinar you want to practice and click **Practice**.
3. Panelists and organizers can join the practice session by clicking the link provided in their invitation email.

**Note:** While in Practice mode, registrants will not be able to join the Webinar. You can click the **Start** button on the GoToWebinar Control Panel to start your Webinar and allow registrants to join.

## PRESENT

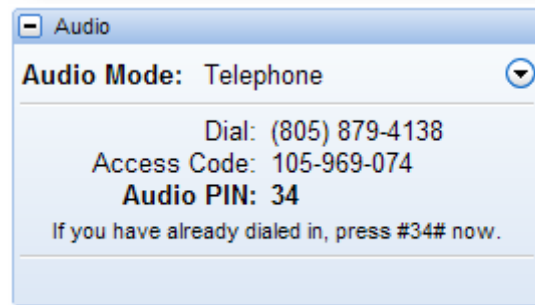
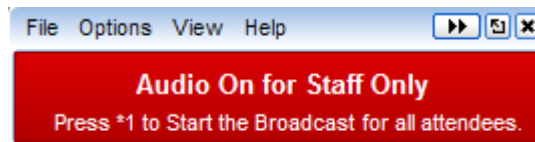
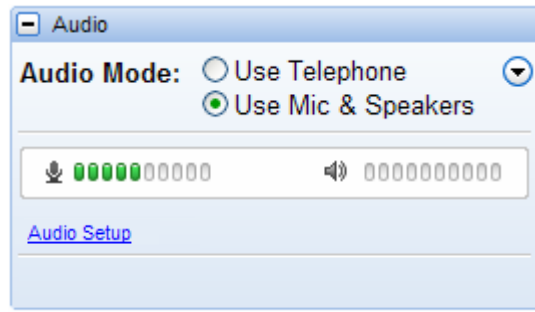
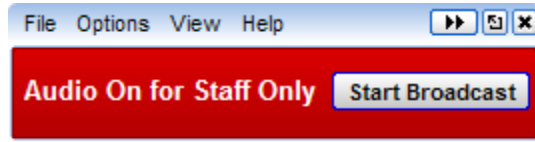
### Start a Scheduled Webinar

1. Log in to your account.
2. On the *My Webinars* page, locate the Webinar you want to start and click the **Start** button.
3. If prompted, click **Yes**, **Grant** or **Trust** to accept the GoToWebinar download.  
Your Webinar will start and the GoToWebinar Organizer Control Panel will appear in the right side of your desktop.
4. Join the audio portion of the Webinar.

## Manage the GoToWebinar Total Audio Service

### Start the Webinar

- **VoIP and Telephone:** If you have selected the option to use either VoIP or Telephone for your Webinar, you will see the options “Use Telephone” and “Use Mic & Speakers” in your Control Panel. The default mode is Mic & Speakers; however, GoToWebinar will remember your selection for your next event.
- If you are joined via Mic & Speakers, you must click **Start Broadcast** to begin the audio portion of your Webinar. Before starting the broadcast, you will be joined in a subconference with all other organizers and panelists you invited.
- **Telephone:** If you have selected the option to use Telephone only for your Webinar, you must join the audio portion by dialing the conference number and providing the Access Code and Audio PIN noted in your Control Panel.
- If you are joined via the telephone, you must press **\*1** on your telephone keypad to begin the audio portion of your Webinar. Before starting the broadcast, you will be joined in a subconference with all other organizers and panelists you invited.



### VoIP Best Practices

Audio quality can vary based on your audio software/hardware manufacturer as well as your operating system. When using VoIP, the following best practices are recommended:

- As with any Webinar, it is important to test your sound quality and audio settings before your live event. In addition to testing your audio settings on the Audio tab in GoToMeeting/GoToWebinar Preferences menu, it is recommended to start your Webinar in Practice mode with other organizers or panelists to provide feedback on your voice quality.
- For optimum sound quality, a headset is recommended, preferably a USB headset for ease of use.
- If a headset is not available, a microphone is required, preferably a USB microphone for ease of use.
- If using a microphone, it should be at least 1.5 feet away from any speakers built in or connected to your computer.
- Unplug any devices, such as a Webcam, that have a built-in microphone.
- The use of a Webcam microphone is not recommended.
- If you plan to record your meeting, be sure to test the recording feature while in Practice mode.

### Dial In to the Conference Call Using the GoToWebinar Audio Service

At the specified Webinar time, dial the conference call number. When prompted, enter the access code followed by the # key.

Once in a conference call, the organizer is automatically entered into a sub-conference between all organizers and panelists. To start the conference call for all participants, an organizer must press \*1.

### Organizer Telephone Commands

Command	Function	Action
*1	Start	Starts the conference call. Organizers and panelists are initially joined in a sub-conference until *1 is pressed.
*2	Count	Provides the number of attendees dialed in to the conference.
*3	Exit	Exits the organizer from the conference call.
*4	Menu	Provides a menu of available conference commands.
*5	Mute/Unmute Organizers and Panelists	Sets mute and un-mute for organizer and panelist lines. By default, organizers and panelists are first joined unmuted. Pressing * 5 cycles through the following options: <ul style="list-style-type: none"> <li>• Mute: organizers and panelists can unmute themselves by pressing *6.</li> <li>• Mute: organizers and panelists cannot unmute themselves</li> <li>• Unmute: organizers and panelists are unmuted (default)</li> </ul>
*6	Organizer Mute/Unmute	Organizer can mute his/her line. Pressing *6 again will unmute the line.
*8	Chime Control	Sets entry and exit chimes. By default, entry and exit chimes are off. Pressing *8 cycles through the following options: <ul style="list-style-type: none"> <li>• Entry chime off and exit chime on</li> <li>• Entry chime on and exit chime off</li> <li>• Entry and exit chimes on</li> <li>• Entry and exit chimes off</li> </ul>

### Manage Attendee Audio

Attendees who join the audio portion of your Webinar are joined muted by default. Attendees joined via VoIP will have a microphone icon next to their name. Attendees joined via telephone will have a handset icon next to their name.

**Note:** Up to 25 attendees can be unmuted at any one time (this is a combination of VoIP and phone attendees).

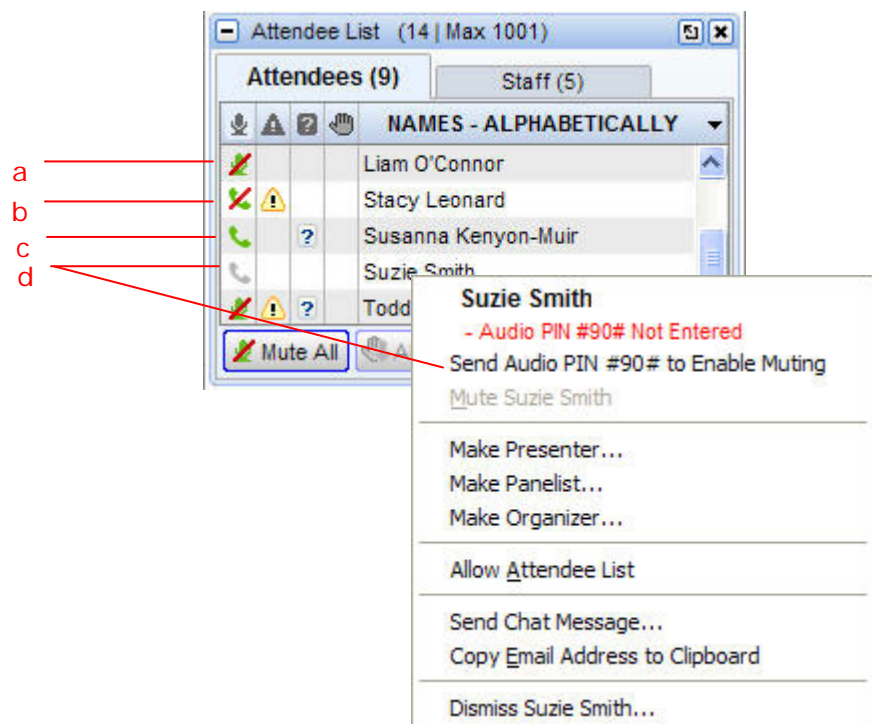
Attendee, joined via VoIP, muted (default) (a)

Attendee, joined via telephone, muted (default) (b)


Attendee joined via telephone, unmuted (c)

Attendees who join the Webinar via telephone must enter their Audio PIN so that you have full audio controls through the Organizer Control Panel. If not entered, you can right-click the person's name and select Send Audio PIN. This will send a pop-up message with the Audio PIN to that person (c)

Attendee, joined via VoIP, unmuted (d)



### Organizer Control Panel

When the organizer first joins the Webinar, the Organizer Control Panel appears on the right side of the desktop. The Organizer Control Panel gives organizers access to various organizer and presenter functions. The Control Panel can be customized – panes can be re-ordered and those with  can be un-docked from the Control Panel and resized.



Dashboard, Audience View and Recording panes are not available in the Mac Organizer Control Panel.

### Menus

Provides access to leaving/ending the Webinar, attendee options, Control Panel tools and online help files (a)

### Screen Sharing

Provides presenter with a visual reminder of On Air status, the ability to show/pause/stop screen sharing, share keyboard and mouse control and change presenters (see the *Presenter Screen Tools Pane* section of this guide) (b)

### Grab Tab

Enables presenter to minimize the Control Panel to the side of the desktop to display his/her full desktop to attendees and still access Screen Sharing tools (see the *Presenter Control Panel Grab Tab* section of this guide) (c)

### Dashboard Pane

Provides organizers with a quick view of the timer, attendance, audience attentiveness, number of unanswered attendee questions and number of hands raised (see the *Dashboard Pane* section of this guide) (d)

### Attendee List Pane

Provides organizers with the ability to manage all Webinar attendees (see the *Manage Attendees* section of this guide) (e)

### Audio Pane

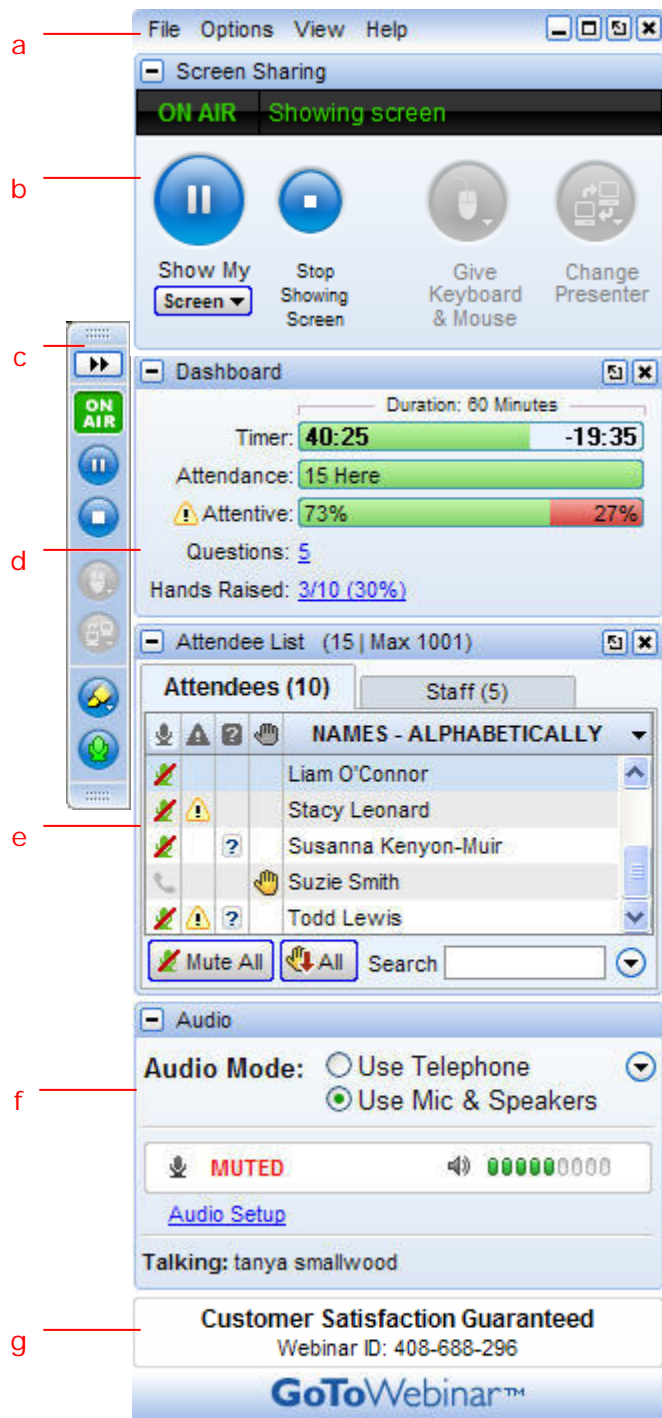
Enables organizers to manage their audio format, audio service and audio setup (see the *Audio Pane* section of this guide) (f)

### Webinar Information Pane

Provided for quick reference; Webinar ID can be given to someone to join through [www.gotowebinar.com](http://www.gotowebinar.com) (g)

### Additional Control Panel Panes

See the next section for additional Control Panel features



### Presenter Control Panel Grab Tab

Click and drag to move Grab Tab up or down (a)

Click to show/hide Control Panel (b)

Shows On Air status (c)

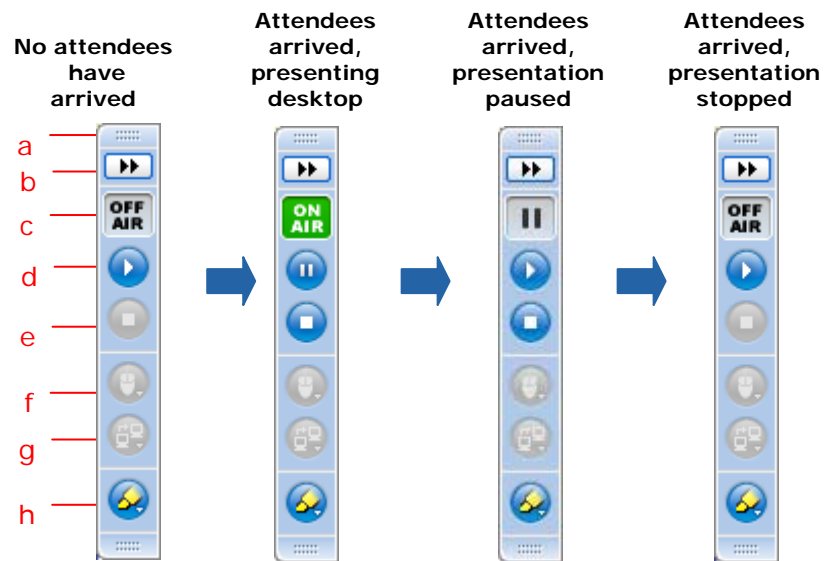
Shares screen. Right-click for screen sharing options (d)

Stop screen sharing (e)

Grant shared keyboard/mouse control to another organizer or panelist (f)

Pass presenter role to another organizer or panelist (g)

Use Drawing Tools to annotate your presentation (h)



### Record a Webinar

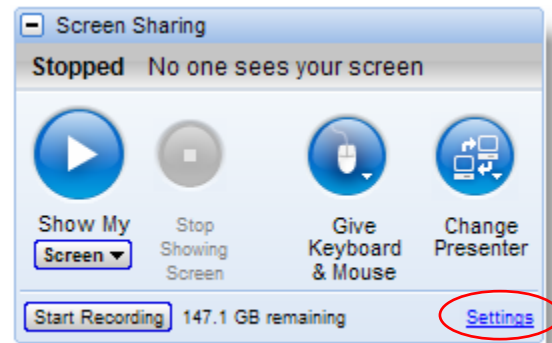
1. From the Organizer Control Panel, click the **View** menu and select *Recording*.
2. Click **Settings** in the Recording pane and confirm that your Audio and Video options are set correctly. For detailed Audio and Video options, click on the [Need audio help?](#) link and [Learn more](#) links, respectively.

**Note:** Be sure to check your audio device settings under the Audio tab.

3. In the Save in: section, click the **Browse** button to identify where you would like to save your recording.

**Note:** For optimum recording performance and in-session experience, it is recommended that you select a location on your local hard drive.

4. Click **OK** to save your settings.
5. In the Recording pane, click the **Start Record** button to start recording.
6. Click **Show My Screen** to capture the video portion of the recording.
7. Click **File** and select **End Webinar** for all to view the completed recording.



### Troubleshooting Webinar Recording

To troubleshoot recording, please see <http://www.gotomeeting.com/s/audiohelp> and <http://www.gotomeeting.com/s/audiolearn>. These links can also be accessed from the recording category under Organizer Preferences.

### Manage Attendees

Organizers can manage attendees and the Webinar staff through the Attendee List pane, either by column or by right-clicking each organizer or panelist name.

### Attendee List Pane

Click tabs to view Attendee or Staff list (a)

Click a column to sort. Right-click to show/hide columns (b)

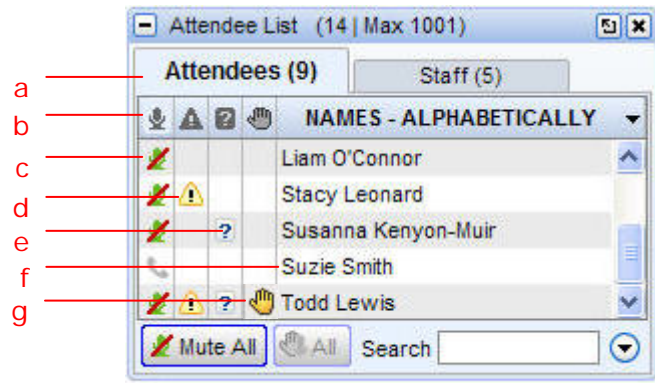
Click to mute/unmute attendees (c)

Shows attendee attentiveness (d)

Shows attendee has a question (e)

Right-click attendee name for attendee options (f)

Shows attendee has raised hand (g)



### Attendee Right-click

Pass presenter role – this also promotes attendee to panelist (a)

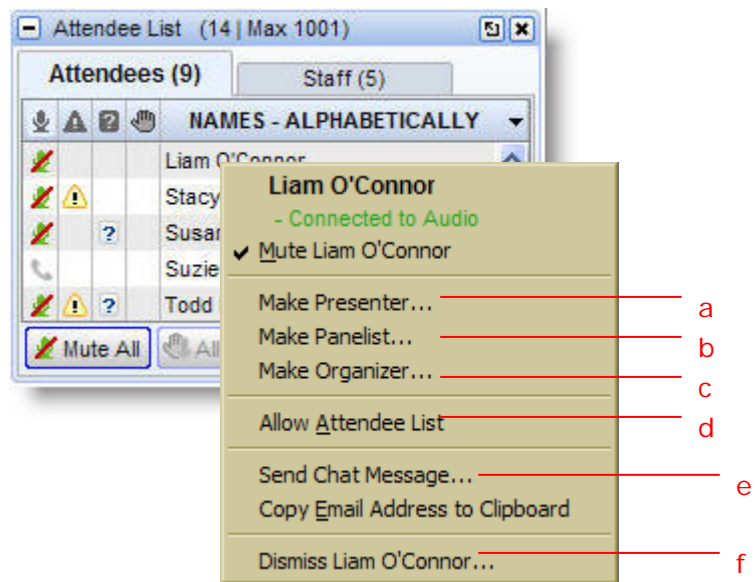
Promote to panelist role (b)

Promote to organizer role (c)

Allow this attendee to view Attendee List (d)

Send chat to this attendee. Attendees will see chat in their Questions pane. Staff will see chat in their Chat pane (e)

Dismiss attendee from the Webinar (f)



### Dashboard Pane

The Dashboard pane assists organizers in monitoring a Webinar at a glance. Organizers can quickly view the timer, attendance and audience attentiveness and hand raising. If the Questions feature is turned on, organizers can see the number of unanswered questions queued in the Questions pane, then click the number to open the Questions pane.



Mac users do not have a Dashboard pane.

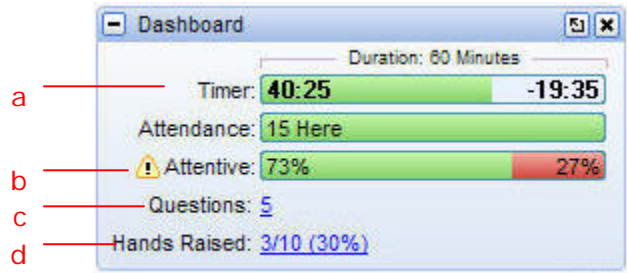
Timer begins when Presenter clicks **Show My Screen** (a)

Attentive = attendee's Viewer is in foreground

Inattentive = attendee's Viewer is not in foreground (b)

Quick-view of number of attendee questions in the queue. Click the number to open the Questions pane (c)

Attendees can raise their hand if enabled by the organizer. Click the number to view who has raised hands in the Attendee List (d)



### Questions Pane

The Questions pane enables organizers to engage their audience. Organizers can sort questions and flag them with priority. Questions can also be assigned to another organizer or, for example, to a panelist attending as a subject-matter expert.

Check to show answered questions (a)

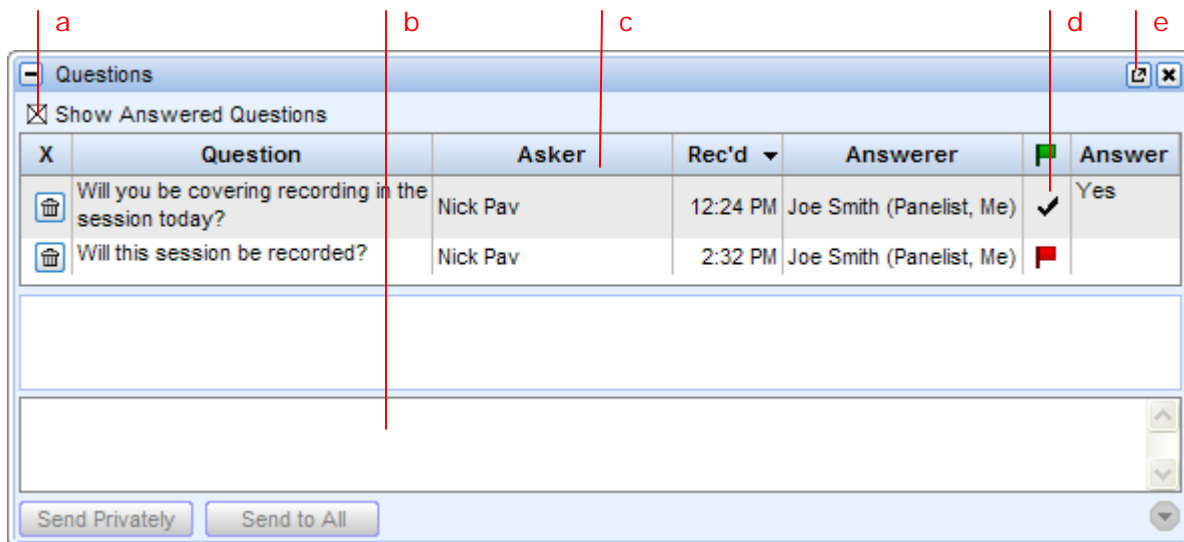
Type in answer. Click **Send Privately** or **Send to All** (b)

Right-click any column header to show/hide columns (c)

Icon indicates answered questions (d)

Click to set priority (d)

Click to snap the Question and Answer pane on and off of the Control Panel (e)



#### ► To assign a question to another organizer or panelist

1. Click the question you want to forward. This will highlight the question.
2. Right-click the question field and select *Assign Question to*.
3. Select the name of the organizer or panelist you want assigned to the question.

**Note:** Only organizers can see all questions and answers, set question priority and assign questions. Panelists can only see questions that are assigned to them by organizers. Panelists can only answer privately to an attendee.

## Polling

Organizers can use polls to revive and engage an audience or to focus its attention. Polls can be created pre-Webinar or in-session on the fly. After a poll has been closed, organizers can choose to show the results immediately or at a later time in the Webinar.

While polling is managed by organizers only, an organizer does not have to be presenting to launch a poll.

### ► To launch a poll

1. In the Polls pane, scroll to the poll you want to launch and click the **Open Poll** button. Attendees will see the poll in their Viewer Window.
2. After you have given attendees time to answer, click the **Close Poll** button.

### ► To show poll results

1. In the Polls pane, scroll to the poll for which you want to show the results.
2. Click the **Show Results** button.
3. Click **Hide Results** to resume your presentation.

### ► To create or edit polls in-session

1. Open the Polls pane in the Organizer Control Panel.
2. If you are presenting, be sure to pause or stop screen sharing.
3. Click **Manage Polls**. If prompted, log in to your account. The *Polls* page will load.
4. After making your changes, click **Save Changes**.  
Log out of your account. Your new or updated polls will appear in the Polls pane of the Organizer Control Panel.

## End a Webinar

1. On the GoToWebinar Organizer Control Panel file menu, select **Exit – End Webinar**.
2. On the End Webinar confirmation dialog box, click **Yes**.

**Note:** At least one organizer must be present to start, manage and end a Webinar. If an organizer chooses to leave a Webinar while allowing it to continue, either another organizer must be present to continue the Webinar or the organizer must promote another attendee or panelist to Webinar organizer.

## WEBINAR FOLLOW UP

### Webinar Analysis

GoToWebinar organizers can get a snapshot view of Webinar statistics once a Webinar has ended. The snapshot view is located in *Webinar History* on the GoToWebinar Web site. Organizers can view such statistics as the number of registrants versus attendees and how many surveys were submitted (if created). Organizers can also access the Performance Report and the Attendee Report, as well as links to Webinar follow-up tasks.

The screenshot shows the 'Webinar History' interface. At the top, there is a search bar with the text 'Enter Webinar title', a date range selector set to 'Past 30 days', and a 'Search' button. Below this is a 'Sort By' dropdown menu set to 'Most Recently Held'. The main content area displays a webinar entry for 'Customer Satisfaction Guaranteed'. To the left of the entry is a 'Change Settings' dropdown menu with 'Select setting...' and a 'View' link. The webinar entry itself shows the 'Actual Date/Time' as 'Tue, Jun 3, 2008 10:35 AM - 10:52 AM PDT' and 'Attended Live' as '361'. Below the entry is a 'Generate Report' section with a dropdown menu set to 'Attendee Report' and options for 'PDF', 'HTML', 'CSV', and 'Excel'. A 'Generate' button is also present. To the right of the report options is an 'Attendee Interest Rating Overview' box showing: 125 highly interested, 109 moderately interested, and 127 mildly interested. Further right is a summary of statistics: 'Attended Live: 361', 'Registered: 623', 'Attendance Rate: 62%', 'Poll Responses: 125', and 'Surveys Submitted: 157'. At the bottom of the entry, there is a 'Recorded Webinar' section with links for 'Manage' and 'Generate Report', and a 'Viewed Recording: 52' statistic. Red lines with letters 'a' through 'e' point to various elements: 'a' points to the webinar entry, 'b' points to the 'Generate Report' section, 'c' points to the 'Recorded Webinar' section, 'd' points to the 'Attendee Interest Rating Overview' box, and 'e' points to the 'Change Settings' dropdown menu.

### Generate Reports

Organizers can get detailed Webinar information by using the Generate Reports feature. This reporting feature allows organizers to view various statistics on Webinars for any date range in either PDF, HTML or Excel® format.

#### ► To generate a report

1. Log in to your account.
2. In the left navigation menu, click **Generate Reports**.
3. Select the report you want to generate (see report descriptions in the following pages):
  - **Registration Report**
  - **Attendee Report**
  - **Performance Report**
  - **Recorded Webinar Report (GoToMeeting Corporate plans only)**
4. Click **Next**.
5. Select the Date Range.
6. Select a Webinar.
7. Select the Report Format (PDF, HTML, Excel or Comma Delimited Text).
8. Click **Generate Report**. Your report will load in a new window.