

GlobalConference

Audio and Web Conferencing Solution

Conferencing Scheduler User Guide

- Use your Microsoft Outlook Calendar System to invite participants to Conferencing audio and Web Meeting conferences easily and efficiently.
- Reserve a meeting by using your Microsoft Outlook Meeting Request. The email invitation to participants will automatically include the information and instructions participants need to join your Conferencing and/or Web Meeting conference.
- Select the Web Meeting button on your conferencing toolbar to automatically login to Web Meeting. This button provides a convenient link to online commands that allow you to more efficiently manage your Conferencing calls right from your desktop or quickly start a Web Meeting.
- Your conference participants may select a link in the Microsoft Outlook email invitation to automatically log in to the Web Meeting.
- Customize your Conferencing Scheduler settings or use Quick Setup to begin sending conferencing invitations immediately.

CONFERENCING SCHEDULER USER GUIDE

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DOWNLOAD THE CONFERENCING SCHEDULER PLUG-IN

Before downloading the Conferencing Scheduler Plug-In, make sure your Microsoft Outlook application is closed.

QUICK SETUP INSTRUCTIONS

1. When the installation of the Conferencing Scheduler plug-in is complete, re-open Microsoft Outlook

2. In Microsoft Outlook go to the Tools menu and select Conferencing Setup

The Conferencing Invitation Setup screen will appear. Enter your Conferencing subscription numbers into the required fields (marked with a red asterisk).

When you are finished with the Setup screen, select "Apply" to apply changes and "OK" to close the Conferencing Invitation Setup screen.

Now you are ready to create Microsoft Outlook email invitations that include your Conferencing and Web Meeting conference information.

CREATE A CONFERENCING MEETING REQUEST

1. From the “New” menu or from the “Conferencing” button on your Conferencing toolbar, select “Conferencing Meeting Request.”

2. From the submenu, you can specify the information you want to appear in your invitation: “Audio” for Conferencing information, “Web” for Web Meeting or “Audio/Web” (for both). The Meeting Request screen that appears automatically displays all of the information participants need to join your Conferencing and/or Web Meeting conference. You can edit any of the information that appears in the unsent meeting invitation. Your conference participants’ email invitation will have one of three different views depending on the type of conference you set up...

1. Conferencing Audio Conference Invitation: Your Conferencing dial-in numbers will automatically appear in the Microsoft Outlook email invitation along with instructions on how to join the Conferencing audio conference.

- You can customize your email invitation to include a second Conferencing dial-in number and label the number with the country it applies to (see “Customize Your Conferencing Scheduler Features”).
- The Microsoft Outlook email invitation includes a hyperlink that displays a list of any additional Conferencing Global “800” (international toll-free/freephone access) dial-in numbers that are available to your participants.
- Standard footer information always appears. It includes Customer Care numbers for technical assistance and instructions for participants to contact you directly with any questions about the meeting.

2. Web Meeting Conference Invitation: The Microsoft Outlook email invitation will include a hyperlink for participants to automatically go to the registration page for Web Meeting.

- The Microsoft Outlook email invitation will also include a hyperlink for participants to perform a system check prior to the start of the Web Meeting. This will confirm the settings on their desktop are consistent with those required to join Web Meeting.
- The Microsoft Outlook email invitation will also include a hyperlink for participants to manually log in to a Web Meeting.
- Standard footer information always appears. It includes Customer Care numbers for technical assistance and instructions for participants to contact you directly with any questions about the meeting.

3. Audio/Web Conference Invitation: All three sections of information – Conferencing, Web Meeting and standard footer – appear in this invitation.

If you make changes to your Conferencing Invitation Setup screen (located in the Tools menu on the Microsoft Outlook toolbar), updates will not be reflected in any of the previous invitations that have already been sent to conference participants. You must create a new meeting invitation or manually modify the invitation and resend to participants.

START A WEB MEETING AUTOMATICALLY

Select “Start Conferencing Web Meeting” from the “Conferencing” button on your toolbar that now appears on your desktop. The system will automatically log you in and open your Web Meeting. This will allow you to more efficiently manage your Conferencing and Web Meeting conferences right from your desktop.

CUSTOMIZE YOUR CONFERENCING SCHEDULER FEATURES

All of the Conferencing Scheduler features are preset to default settings. You have the option to change these settings and customize your Conferencing Scheduler information. You may change these settings as often as you like. Once implemented, the new settings will apply only to the new Conferencing invitations you create from that point on.

If you want to change the content of a specific email invitation, you do not need to change your Conferencing Scheduler settings. That content may be edited when you create your invitation. Change your Conferencing Scheduler settings when you want to change the way information auto-populates in your invitations on an ongoing basis.

In Microsoft Outlook, go to the Tools menu and select Conferencing Setup. The Conferencing Invitation Setup screen will appear. When you are finished making changes to the default settings, select “Apply” to apply changes but remain in the setup screen, or select “OK” to apply changes and close the setup screen. The following features can be customized:

CONFERENCING AUDIO

FIELD: “Access number type”

- If you want a second Conferencing phone number to automatically populate in the content of your email invitation, you may enter an additional access number in this field.
- For a list of Conferencing Global “800” numbers (international toll-free/freephone access) available to your company, click on the “View additional Conferencing phone numbers” hyperlink in your Conferencing Invitation Setup screen.
- The default setting for “optional additional access phone number” is blank. No additional Conferencing phone number will appear in the email invitation.
- By using the “Access number type” option described above, you can designate the labels that should appear next to each Conferencing number so participants will know which one number to dial, based on where they are located.

CHECKBOX: “Display conference numbers in Location field of invitation”

- When this feature is ON, your Conferencing phone number and 7-digit access code will automatically populate in the Location field of the email invitation for Audio and/or Web.
- When this feature is ON, you still have the option to type over the Conferencing phone number and 7-digit access code that will automatically populate in the Location field.
- The default setting for this checkbox is ON.

- To turn the feature OFF, un-check the box. The Location field of a new conference Meeting Request will by default be blank.

CHECKBOX: “View additional Conferencing phone numbers”

- When this feature is ON, a hyperlink will automatically appear in your Conferencing audio conference email invitation. When participants click on the hyperlink, they will see a list of Conferencing Global “800” (international toll-free/freephone access) phone numbers available to dial in to the conference.
- The default setting for this checkbox is ON.
- To turn the feature OFF, un-check the “Display in Invitation” box. The hyperlink will no longer automatically be included in the Conferencing audio email invitation for participants.

VIEW/EDIT: “Conferencing invitation content”

- When you select the VIEW/EDIT button you will preview the default content that will automatically appear in your Conferencing Audio conference invitation (in the box labeled “Participant invitation preview”).
- In the box labeled “Customize the content of your Conferencing audio conference invitation” you can delete or edit the content that appears. You can also type in additional text that will automatically appear in all of your Conferencing audio conference invitations, following the default content.
- To save changes, select the “OK” button. To return to the default text, select the “Restore Defaults” button and then select “OK”.

CONFERENCE WEB MEETING

CHECKBOX: “Browser Test”

- When this feature is ON, a hyperlink will automatically appear in your Web Meeting email invitation. When participants click on the hyperlink, they will see the results of a system test showing whether their desktop browser settings are compatible with Web Meeting. This is a good way for participants to check their configuration in advance to ensure easy access to the Web Meeting at conference start time.
- The default setting for this checkbox is ON.
- To turn the feature OFF, un-check the “Display in Invitation” box. The hyperlink will no longer automatically be included in the Web Meeting email invitation for participants.

VIEW/EDIT: “Web Meeting invitation content”

- When you select the VIEW/EDIT button you will pre-view the default content that will automatically appear in your Web Meeting conference invitation (in the box labeled “Participant invitation preview”).
- In the box labeled “Customize the content of your Conferencing Web Meeting invitation” you can delete or edit the content that appears. You can also type in additional text that will automatically appear in all your Web Meeting conference invitations, following the default content.
- To save changes, select the “OK” button. To return to the default text, select the “Restore Defaults” button and then select “OK”.

CHECKBOX: “Auto-login from Outlook toolbar”

- When this feature is ON, you may select “Start Conferencing Web Meeting” from the “Conferencing” log you in to Web Meeting as a Chairperson.
- The default setting for this checkbox is ON.
- To turn the feature OFF, un-check the “Auto-login from Outlook toolbar” box. Then when you select “Start Conferencing Web Meeting” from the “Conferencing” button on your toolbar, the system will take you to the Conferencing Conferencing Customer Web page
- where you can login to Web Meeting manually by entering your Conferencing information.
- *Reminder: If you have recently changed your Chairperson passcode but have not entered the updated passcode into the Conferencing Setup screen, the automatic login will not work. To reset the new Chairperson passcode, go to the Tools menu on you Microsoft Outlook toolbar and select Conferencing Setup. Enter your new Chairperson passcode into both required Chairperson passcode fields. Select “Apply”.

CHECKBOX: “Customer Care numbers”

- When this feature is ON, a hyperlink will automatically appear in your Conferencing audio and/or Web Meeting conference invitation. When participants click on the hyperlink, they will see a list of global toll-free/freephone Customer Care numbers for the Conferencing Help Desk.

The default setting for this checkbox is ON.

- To turn the feature OFF, un-check the “Display in Invitation” box. The hyperlink will no longer auto-matically be included in the global toll-free/freephone Customer Care numbers in the Conferencing and/or Web Meeting conference invitation for participants.

VIEW/EDIT: “Conference Invitation Footer content”

- When you select the VIEW/EDIT button you will preview the default content that will automatically appear in all of your Conferencing and/or Web Meeting conference invitations (in the box labeled “Participant invitation preview”).
- In the box labeled “Customize the footer of your Conferencing meeting invitation” you can delete or edit the content that appears. You can also type in additional text that will automatically appear in all of your Conferencing and/or Web conference invitations, following the default content.
- To save changes, select the “OK” button. To return to the default text, select the “Restore Defaults” button and then select “OK”.

CHECKBOX: “Version Update Notification”

- When this feature is ON, the system will automatically notify you when there is an updated version of the Conferencing Scheduler plug-in available for download.
- The default setting for this checkbox is OFF.
- To turn the feature ON, check the “Version Update Notification” box. You will be notified by a pop-up box whenever there is an updated version of the Conferencing Scheduler plug-in available to download.

CONFERENCING SCHEDULER UPDATES

Changes to Your Conferencing Subscription Numbers

Anytime you change your Conferencing Chairperson passcode, or if your 7-digit access code changes, you will need to update your Conferencing Setup screen, to ensure that your Conferencing Scheduler features work properly. To reset your any of your subscription information, go to the Tools menu on your Microsoft Outlook toolbar and select Conferencing Setup. Enter your new subscrip-tion information into the required fields on the screen and select "Apply". The new subscription numbers will apply only to the new invitations you create after you have implemented the changes in your Conferencing Setup screen. In the rare instance that your 7-digit access code has changed, you will need to create new invitations for any outstanding meetings to ensure that the correct code is in the participants' instructions for joining a Conferencing and/or Web Meeting.

If you have changed your Chairperson passcode, you do not need to update invitations sent previously since the passcode does not affect information your participants receive. It does affect your automated login using the "Start Conferencing Web Meeting" from the "Conferencing" button on your toolbar. If your current email address is on file with Conferencing, you will receive an email from Conferencing any time you change your subscription numbers, reminding you to update your Conferencing Scheduler Setup screen. Contact Customer Care (see toll-free/freephone numbers listed below) if you want to provide an updated email address.

Changes to Feature Settings and Invitations

When you customize Conferencing Scheduler feature settings, the new settings will apply only to the invitations you create after you have implemented the changes in your Conferencing Setup screen. Changes will not affect previously sent invitations.

Conferencing Scheduler Plug-in Updates

An optional feature is available to automatically notify you anytime a new version of the Conferencing Scheduler plug-in is available. To turn the feature ON, go to the Microsoft Outlook Tools menu and select Conferencing Setup. Check the "Version Update Notification" box in the lower left corner of the screen. You will be notified by a pop-up box whenever there is an updated version of the Conferencing Scheduler plug-in available to download.

SYSTEM REQUIREMENTS

- Windows NT, XP, 2000, '98, XP Home, ME
- Microsoft Outlook 2000, Microsoft Outlook XP (2002), Microsoft Outlook 2003
- Conferencing subscription
- Conferencing Scheduler Plug-in

UNINSTALLING THE PLUG-IN

1. Close Microsoft Outlook on your PC desktop
2. From the Start button on your toolbar, select Settings, select Control Panels, select Add/Remove Programs
3. Select "Conference Scheduler Plug-in"
4. Select change/remove
5. Confirm removal by selecting "Yes" at the confirmation pop-up
6. Removal is complete