

# Conferencing Scheduler Configuration Guide

September 2007  
Version 2.0

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## Overview

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### **Conferencing Scheduler Allows You To:**

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

# 1 Installation

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## 1.1 Downloading the Plug-in

To download the plug-in, go to:

<http://www.voicesupportcenter.com/BizFeatures/?pager=6> and click “Conferencing Scheduler Plugin Download”

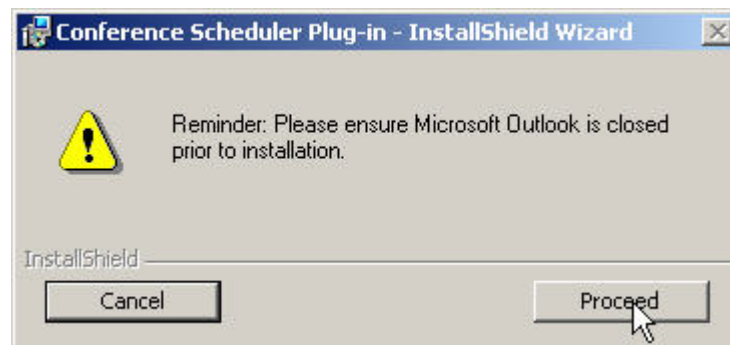
Select “Save” to download and save this file to your PC.

**NOTE:** To successfully download the Conferencing Scheduler plug-in, you will need to have administrative rights to download software onto your PC. If you are not sure of your permissions, contact your Network Administrator. If your Network Administrator has automatically installed the plug-in on your desktop, you can skip the download process and go directly to Quick Setup Instructions.

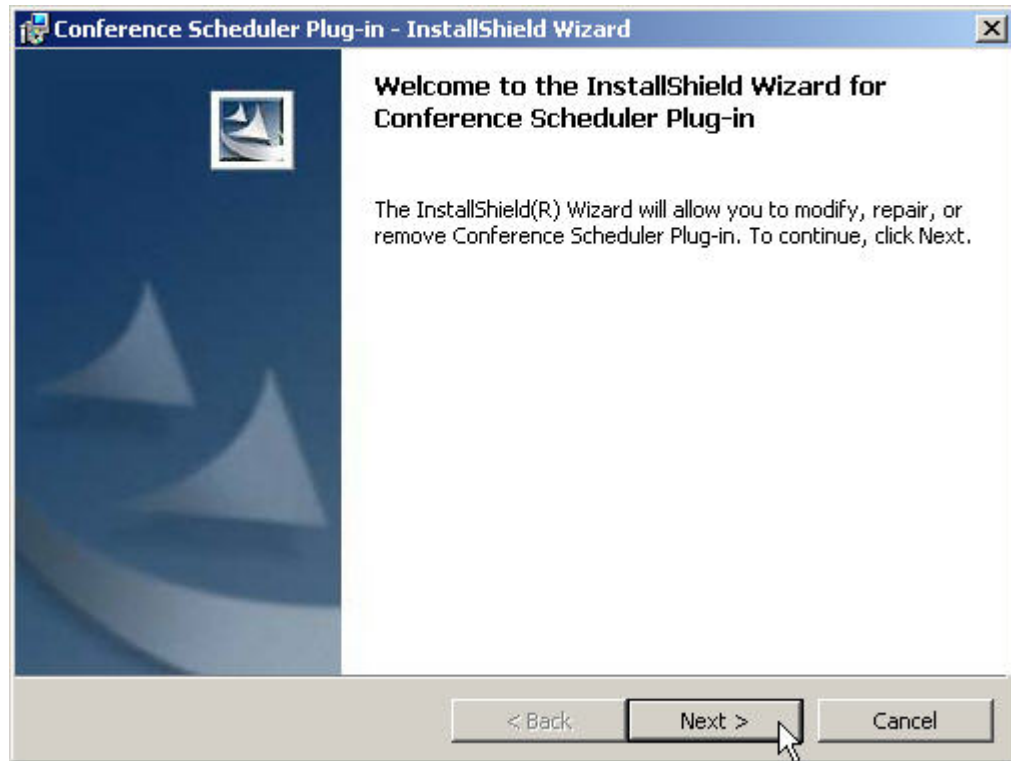
## 1.2 Installing the Plug-in

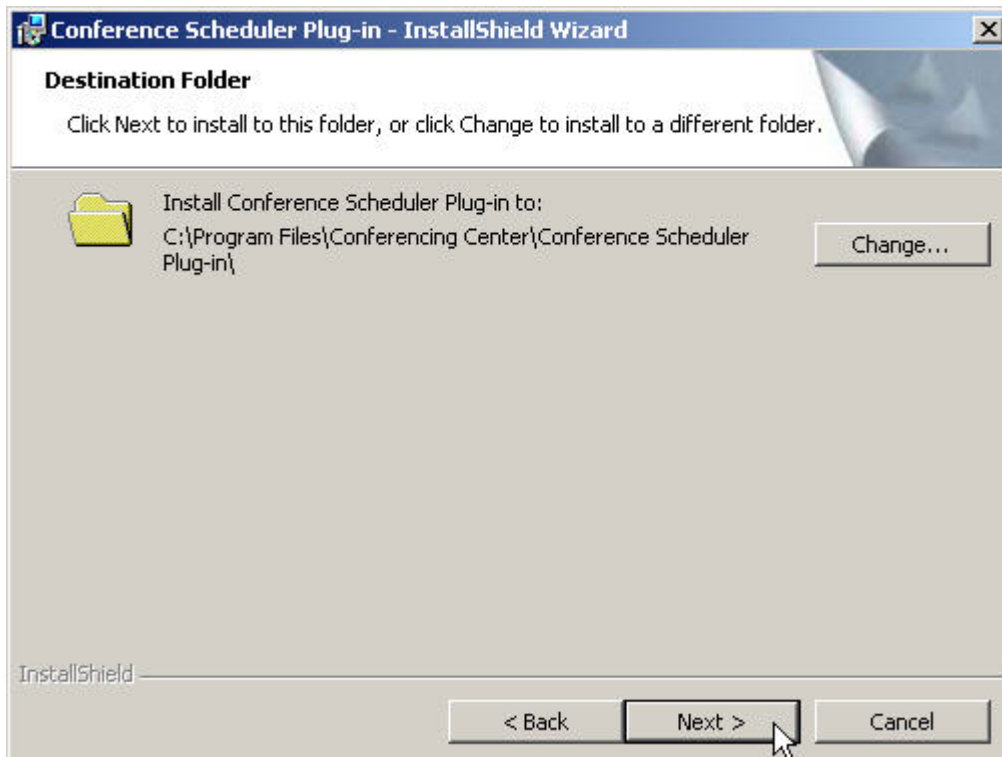
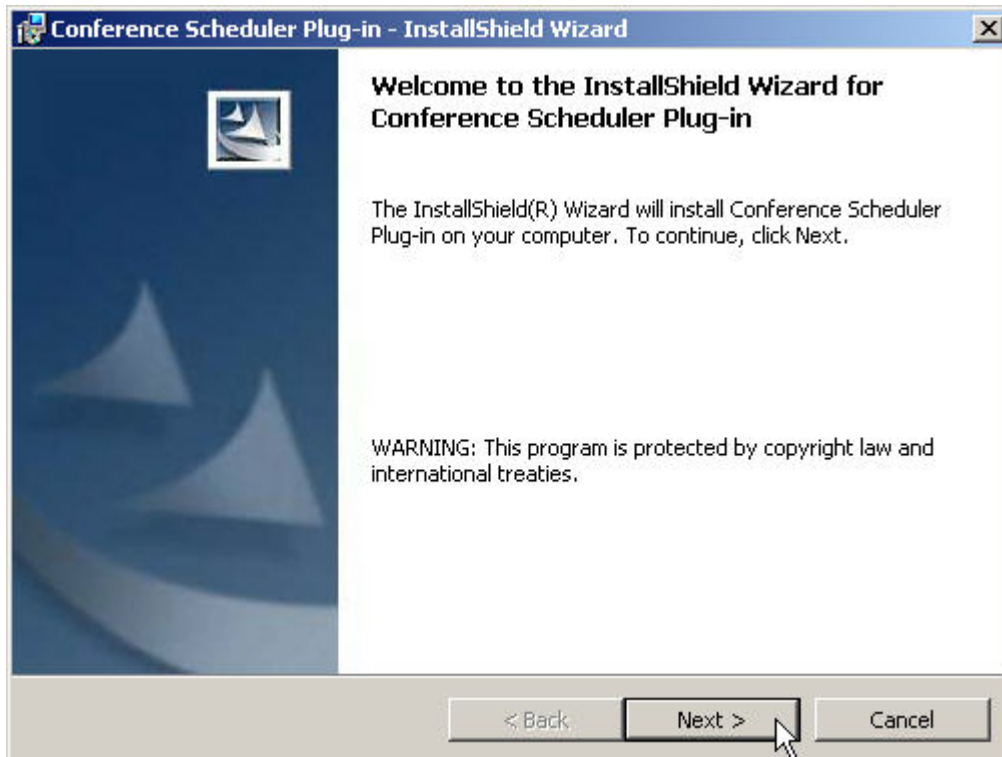
Before installing the Conferencing Scheduler Plug-in, make sure your Microsoft Outlook application is closed.

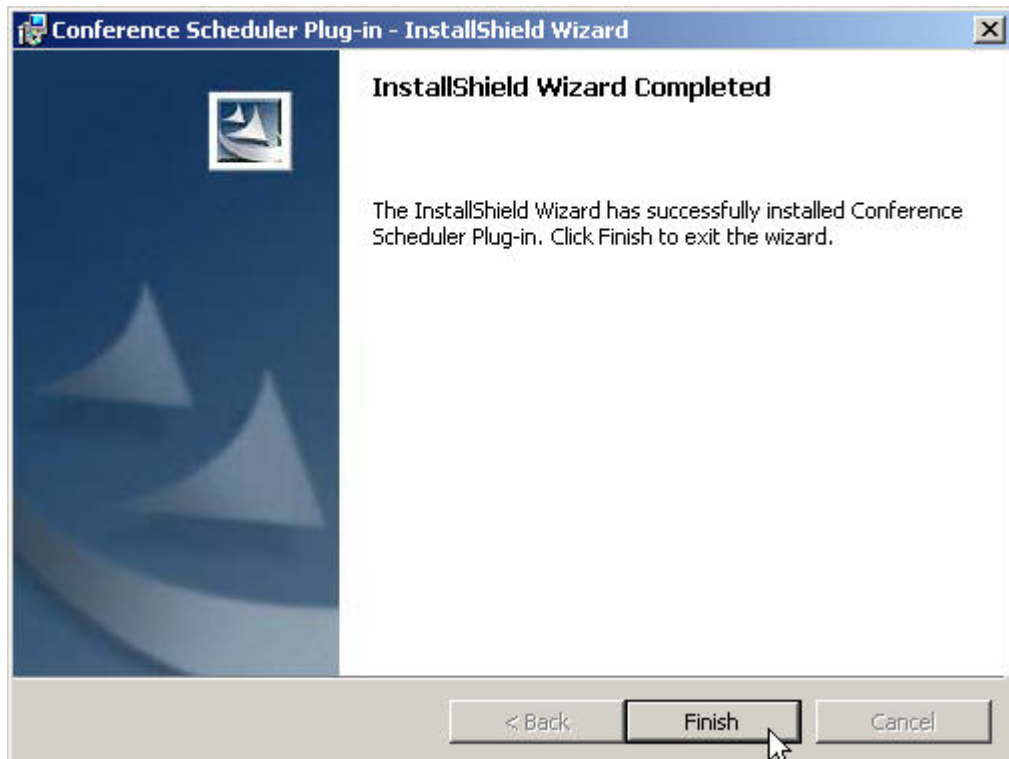
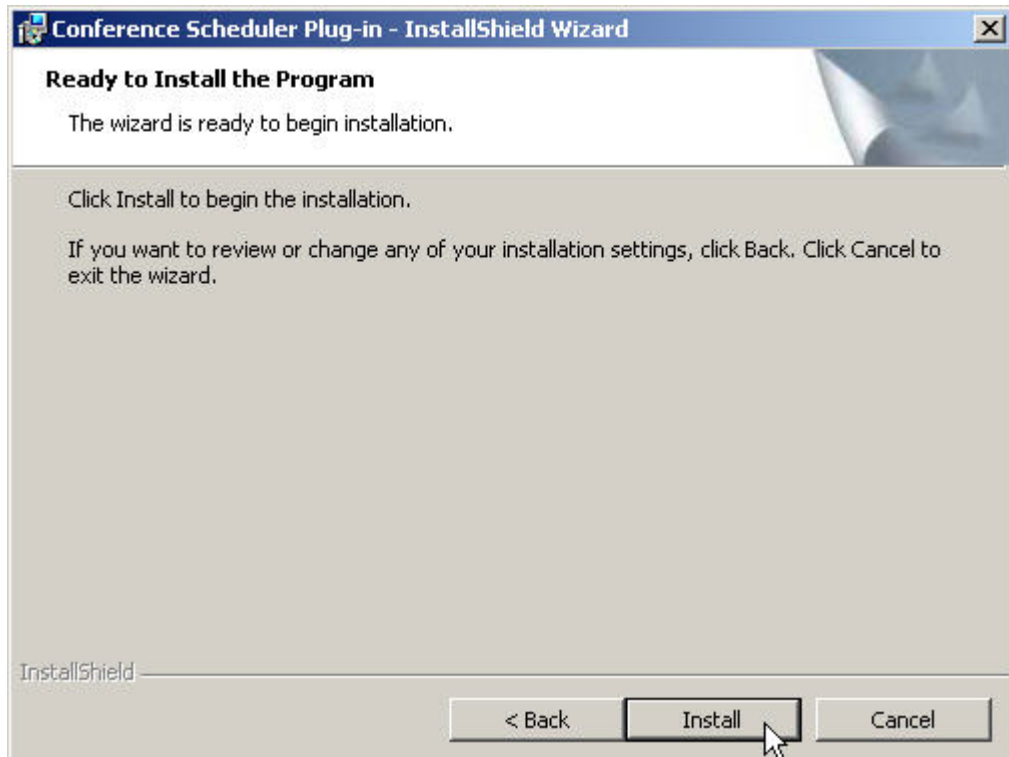
Double-click on the conferencing\_scheduler\_plugin.exe file you just downloaded to begin installation. Refer to the diagrams below for installation guidelines.



## 1.2.1 The Installation Process









## 2 Configuration

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Following the installation of the plug-in, open Microsoft Outlook and configure the settings using the conferencing subscription information provided to you when your subscription was created.

To access the settings, Click on the Tools menu on the Outlook toolbar and select Setup.

Configure your options as shown:

**Conferencing Invitation Setup**

**Conferencing:**

\*Conferencing phone number:  Access number type:

Optional additional access phone number:  Access number type:

\*7-digit access code:

Display phone number and access code in Location field of invitation

\*Chairperson passcode:

\*Reenter passcode:

Audio conference invitation content:

*\* Required field*

**Conferencing Web Moderator:**

[Browser Test:](#)  Display in invitation

Web Moderator invitation content:

Auto-login from Outlook toolbar

**Conferencing Invitation Footer:**

Conference invitation footer content:

Version Update Notification

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

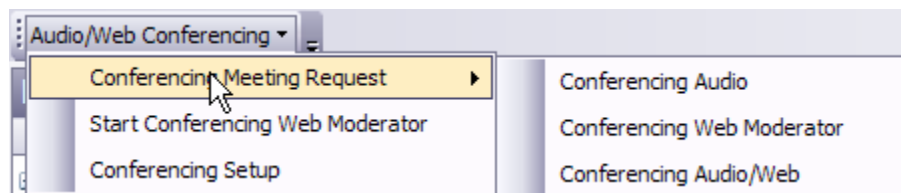
Now you are ready to create Microsoft Outlook e-mail invitations that include your Conferencing and Web Meeting conference information.

### 3 Using the Conferencing Plug-in

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#### 3.1 Creating a Conferencing Meeting Request

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



From the submenu, you can specify the information you want to appear in your invitation: “Audio” for Conferencing information, “Web” for Web Conferencing 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’ e-mail invitation will have one of three different views depending on the type of conference you set up...

##### 3.1.1 Audio Conference Invitation

Your Conferencing dial-in numbers will automatically appear in the Microsoft Outlook e-mail invitation along with instructions on how to join the audio conference.

You can customize your e-mail invitation to include a second Conferencing dial-in number and label the number with the country it applies to (see “Customize Your Scheduler Features”).

The Microsoft Outlook e-mail invitation includes a Global “800” (international toll-free/freephone access) dial-in numbers that are available to your participants.

Standard footer information always appears. It includes Customer Car numbers for technical assistance and instructions for participants to contact you directly with any questions about the meeting.

##### 3.1.2 Web Conference Invitation

The Microsoft Outlook e-mail invitation will include a hyperlink for participants to automatically go to the registration page for Web Meeting.

The Microsoft Outlook e-mail 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 the Web Meeting.

The Microsoft Outlook e-mail invitation will also include a hyperlink for participants to manually log into 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.

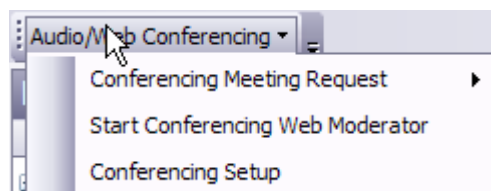
### 3.1.3 Audio/Web Conference Invitation

All three sections of information – Audio, Web Meeting, and standard footer – appear in this invitation.

**Important Note:** 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.

## 3.2 Starting Your Web Meeting Automatically

To start your web meeting automatically, select the “Start Web Conferencing” option from the Conferencing Services button located on your Microsoft Outlook toolbar as shown:



The system will automatically log you in and open you Web Meeting. This will allow you to more efficiently manage your Conferencing and Web Meeting conferences right from your desktop.

## 4 Customize your Conferencing Scheduler Features

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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 e-mail 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 “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.

Refer to the graphic in Section 2.

### 4.1 Features That May Be Customized

#### 4.1.1 Audio Conference Options

##### Field – “Access Number Type”

If you want a second Conferencing phone number to automatically populate in the content of your e-mail 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 e-mail 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 e-mail 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 e-mail 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 e-mail invitation for participants.

#### **View/Edit Button – “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”.

### **4.1.2 Web Conferencing Options**

#### **Checkbox – “Browser Test”**

When this feature is ON, a hyperlink will automatically appear in your Web Conferencing e-mail 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 Conferencing.

**HELPFUL HINT:** 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 this feature OFF, un-check the “Display in invitation” box. The hyperlink will no longer automatically be included in the Web Meeting e-mail invitation for participants.

#### **VIEW/EDIT Button – “Web Conference invitation content”**

When you select the VIEW/EDIT button you will preview the default content that will automatically appear in your Web conference invitation (in the box labeled “Participant invitation preview”).

In the box labeled “Customize the content of your Conferencing Web Conference 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 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 Web Conferencing” from the “Conferencing Services” button on your Microsoft Outlook toolbar to log you in to a Web Meeting as a chairperson.

The default setting for this checkbox is ON.

To turn this feature OFF, un-check the “Auto-login from Outlook toolbar” box. Then when you select “Start Web Conferencing” from the “Conferencing Services” button on your Microsoft Outlook toolbar, the system will take you to the Conferencing Customer Web page where you can log in to Web Meeting manually by entering your login information.

**Reminder:** If you have recently changed your Chairperson passcode but have not entered the updated passcode into the Setup screen, the automatic login will not work. To set the new Chairperson passcode, go to the Tools menu on your 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 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 this feature OFF, un-check the “Display in Invitation” box. The hyperlink will no longer automatically be included in the global toll-free/freephone Customer Care numbers in the Conferencing and/or Web Meeting conference invitation for participants.

#### **VIEW/EDIT Button – “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 Scheduler Plug-in available for download.

The default setting for this checkbox is OFF.

To turn this 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.

## **5 Conferencing Scheduler Updates**

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### **5.1 Changes to Your Subscription Numbers**

Anytime you change your Conferencing Chairperson passcode, or if your 7-digit access code changes, you will need to update your Setup screen to ensure that your Conferencing Scheduler features work properly. To reset any of your subscription information, go to the Tools menu on your Microsoft Outlook toolbar and select Setup. Enter your new subscription 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 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 Web Conferencing” from the “Conferencing Services” toolbar button.

If your current e-mail address is on file with Conferencing, you will receive an e-mail from Conferencing any time you change your subscription numbers, reminding you to update your Scheduler Setup screen. Contact Customer Care (See toll-free/freephone numbers listed below) if you want to provide an updated e-mail address.

## 5.2 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. Changes will not affect any previously sent invitations.

## 6 System Requirements

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The Conferencing Scheduler Plug-in has some basic system requirements outlined below:

- 1.) Microsoft Windows 2000, XP, or Server 2000/2003
- 2.) Microsoft Outlook 2000, XP, or 2003
- 3.) Conferencing Subscription

Note: Previous versions of Microsoft Windows or Microsoft Outlook *may* function but have not been tested and will not be supported by Customer Care.

## 7 Uninstalling the Conferencing Scheduler Plug-in

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To uninstall the Conferencing Scheduler Plug-in follow these steps:

- 1.) Close Microsoft Outlook
- 2.) Navigate to your Start menu, Settings, Control Panel
- 3.) Double-click on Add/Remove Programs
- 4.) Select “Conference Scheduler Plug-in”
- 5.) Select change/remove
- 6.) Confirm removal by selecting “yes” at the confirmation pop-up
- 7.) Removal is complete

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