

Conference Scheduling Assistant User Guide

www.mymeetings.com

Overview

Conference Scheduling Assistant (CSA) is an online tool that allows you to view, schedule, and modify reserved meetings, as well as Instant Meeting Subscriptions. The intuitive set-up process walks you through the tool step-by-step; allowing you to schedule conferences with ease.

The screenshot shows the 'Conference Scheduling Assistant' web interface. At the top, there are navigation links for 'Products and Services', 'Customer Resources', 'Access Your Account', and 'Leader Tools'. The 'Access Your Account' menu is open, showing 'Manage My Meetings' and 'Logout'. Below this, there are tabs for 'Current Conferences' and 'Completed / Cancelled'. A date range filter is set from '01/26/2011' to '02/26/2011' with a 'Show List' button and a 'Refresh List' button. A table lists two conferences:

	Start Date	Conference Type	Leader Name	Confirmation Number	Meeting Name	Phone Number(s)	Participant Passcode	Leader Passcode
<input checked="" type="radio"/>	Jan-26-2011	Instant Meeting	OLGA CUSTOMER	3555584	All Purpose Meeting	1-800-828-7828	888888	888888
<input type="radio"/>	Feb-25-2011 06:00 PM CT	Premier	MOUSTAPHA CLIENT	3555585		1-800-828-7828	888888	888888

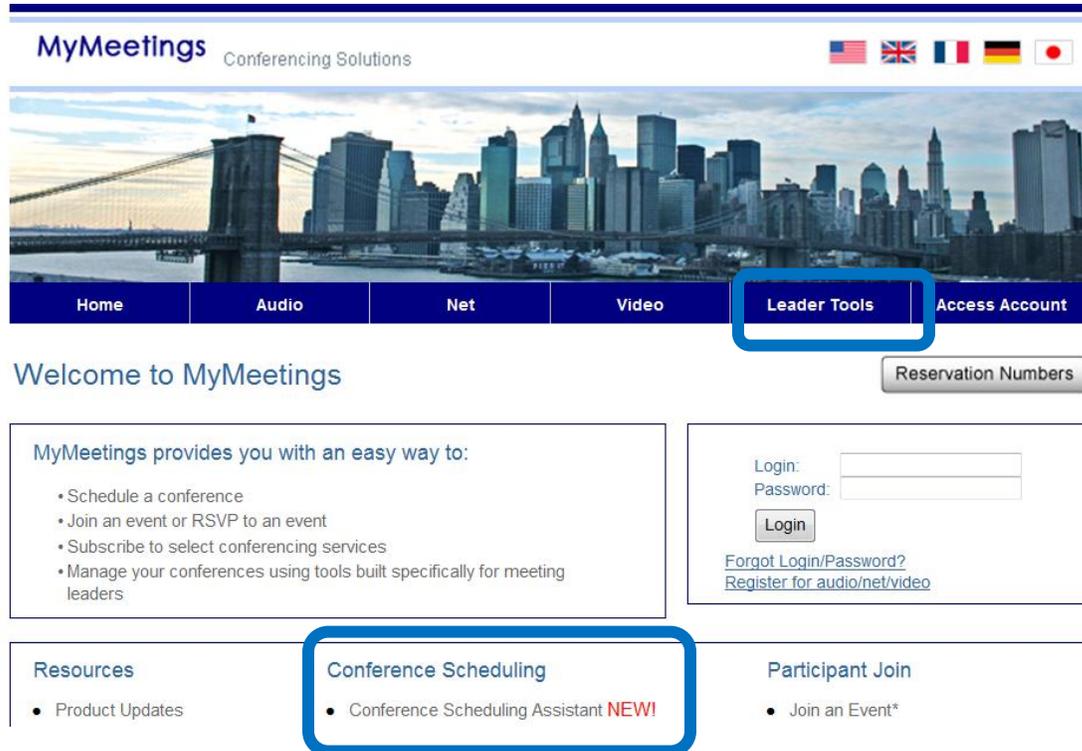
Below the table is a row of action buttons: 'View', 'Schedule New Conference', 'Modify Conference', 'Duplicate Conference', and 'Cancel Conference'. At the bottom, there is a note: 'Orders with their Conference Type displayed in blue text are part of a recurring series. Orders part of recurring series, displayed in green text color are updated after recurring series creation. Please Note: If your order is not listed, you may need to reload the page. Please click the "Refresh List" icon at the top of this page.'

Callout boxes provide the following instructions:

- View Current or Completed/Cancelled meetings.
- Return to the Manage My Meetings tab screen from the Access Your Account drop-down menu.
- Change the date range of currently viewed meetings
- View currently scheduled Instant Meeting Subscriptions and Unattended, Standard, or Premier Calls.
- Schedule a new conference.
- Select a conference in the first column then choose View, Modify, Duplicate, or Cancel.

To Begin using Conference Scheduling Assistant (CSA)

1. Go to www.mymeetings.com
2. Launch CSA from Leader Tools or click on the "Conference Scheduling Assistant" link
3. Enter your login name and password



MyMeetings Conferencing Solutions

Home Audio Net Video **Leader Tools** Access Account

Welcome to MyMeetings Reservation Numbers

MyMeetings provides you with an easy way to:

- Schedule a conference
- Join an event or RSVP to an event
- Subscribe to select conferencing services
- Manage your conferences using tools built specifically for meeting leaders

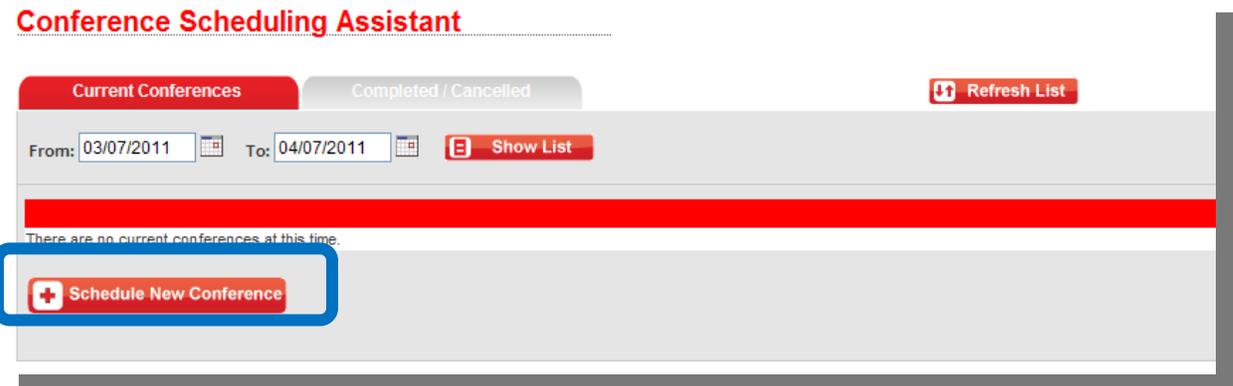
Login:
Password:

[Forgot Login/Password?](#)
[Register for audio/net/video](#)

Resources **Conference Scheduling** Participant Join

- Product Updates
- Conference Scheduling Assistant **NEW!**
- Join an Event*

4. Once you log in, click on Schedule New Conference



Conference Scheduling Assistant

Current Conferences Completed / Cancelled Refresh List

From: To: Show List

There are no current conferences at this time.

Schedule New Conference

5. The 'Type of Conference' section opens
 - First choose who will be the leader. If you will be hosting the meeting, choose 'Leader'
 - If you are setting up a meeting for someone else, select 'Not Leader'
 - The 'Search for Leader' window opens. You must enter First Name, Last Name, and correct email address. Click Search for Leader

Type of conference

Will you be the leader for the conference? Leader Not Leader

Search for leader

Please enter the name and email address of the leader.

First name:

The following leader(s) has been found:

First name	Last name	Email
<input checked="" type="radio"/>	MARLYN	[REDACTED]

*The selected leader will be added to the leader list on the "Select Leader" tab.

6. The next choice to make is whether or not you will need operator assistance.

Type of conference

Will you be the leader for the conference? Leader Not Leader

Will you need operator assistance? Operator assisted No operator

7. Choose the appropriate frequency – one time, recurring, or multiple conferences. The following screens will change depending on your selection.
 - If you choose Recurring, you have the option to select the appropriate frequency.
 - If you select Multiple Conferences, you have the option to 'Add Another Conference'.

Type of conference

Will you be the leader for the conference? Leader Not Leader

Will you need operator assistance? Operator assisted No operator

What will the frequency of your conference(s) be? One time Recurring series Multiple conferences 24 / 7 reservationless

In this example we'll explore the steps to schedule a one time call.

8. Select the date and time of your conference and select the duration.
9. Indicate how participants will access your conference: Will everyone call in? Or will some or all of the participants need to be called by an Operator?
 - o If you or your participants need to be dialed out to, the screen updates dynamically to allow you to enter the participant's names and phone numbers.

Type of conference

Attended - One Time

Logistics ▾

What is the date and time for your conference? 12/31/2011 04 : 15 PM CENTRAL TIME

ASAP Call (Your call will start within 20 minutes of submitting this request.)

What is the expected duration of your conference? 01 : 00

How would you like your participants to access your conference?
 Dial-In Only Operator Dial-Out Only Combination

Company ID 12345

Who should an operator dial out to join the conference? Leader Participant

Dial Leader First Dial Leader Last

Leader First Name	Leader Last Name	Leader Country Code	Leader Phone Number
OLGA	CUSTOMER	1	

In this example, everyone will be calling in to the conference.

10. Select Dial In and enter the number of participants.
11. Next, indicate the kind of phone numbers that you need. This screen will vary based on the preferences of your company, and your home region.

NOTE: This example shows a U.S. based customer who can schedule U.S. phone numbers, but can also add Global Access numbers. You may, or may not have that option available to you.

12. Please note that if you do select a Toll number, enter at least 1 in the 'Number of participants using the US Toll number' field.

Attended - One Time

Logistics ▾

What is the date and time for your conference? 12/31/2011 04 : 15 PM CENTRAL TIME

ASAP Call (Your call will start within 20 minutes of submitting this request.)

What is the expected duration of your conference? 01 : 00

How would you like your participants to access your conference?
 Dial-In Only Operator Dial-Out Only Combination

How many dial-in participants will be joining? 50

How would you like participants to dial into the conference? US Toll-Free US Toll (also available for international users) Global Access VNET

Number of participants using the US Toll number 5

Company ID 12345

13. If your company allows Global Access numbers; you'll be presented with a screen allowing you to choose the numbers you need for your meeting. Choose the numbers you need. You still need to enter the number of participants using a US Toll number.

Country / City	Toll	Toll-Free	Country / City	Toll	Toll-Free	Country / City	Toll	Toll-Free
<input type="checkbox"/> Select All Toll Locations			<input type="checkbox"/> Select All Toll-Free Locations					
• ARGENTINA	<input type="checkbox"/>	<input type="checkbox"/>	• GREECE	<input type="checkbox"/>	<input type="checkbox"/>	• PERU	<input type="checkbox"/>	<input type="checkbox"/>
• AUSTRALIA	<input type="checkbox"/>	<input type="checkbox"/>	• HONG KONG	<input type="checkbox"/>	<input type="checkbox"/>	• PHILIPPINES	<input type="checkbox"/>	<input type="checkbox"/>
- ADELAIDE	<input type="checkbox"/>	<input type="checkbox"/>	• HUNGARY	<input type="checkbox"/>	<input type="checkbox"/>	• POLAND	<input type="checkbox"/>	<input type="checkbox"/>
- BRISBANE	<input type="checkbox"/>	<input type="checkbox"/>	• INDIA	<input type="checkbox"/>	<input type="checkbox"/>	• PORTUGAL	<input type="checkbox"/>	<input type="checkbox"/>
- CANBERRA	<input type="checkbox"/>	<input type="checkbox"/>	- INDIA A	<input type="checkbox"/>	<input type="checkbox"/>	• RUSSIA	<input type="checkbox"/>	<input type="checkbox"/>
- MELBOURNE	<input type="checkbox"/>	<input type="checkbox"/>	- INDIA B	<input type="checkbox"/>	<input type="checkbox"/>	• SAUDI ARABIA	<input type="checkbox"/>	<input type="checkbox"/>
- PERTH	<input type="checkbox"/>	<input type="checkbox"/>	- INDIA C	<input type="checkbox"/>	<input type="checkbox"/>	• SINGAPORE	<input type="checkbox"/>	<input type="checkbox"/>
- SYDNEY	<input type="checkbox"/>	<input type="checkbox"/>	• INDONESIA	<input type="checkbox"/>	<input type="checkbox"/>	• SLOVAK REPUBLIC	<input type="checkbox"/>	<input type="checkbox"/>
• AUSTRIA	<input type="checkbox"/>	<input type="checkbox"/>	• IRELAND	<input type="checkbox"/>	<input type="checkbox"/>	• SOUTH AFRICA	<input type="checkbox"/>	<input type="checkbox"/>
• BELGIUM	<input type="checkbox"/>	<input type="checkbox"/>	• ISRAEL	<input type="checkbox"/>	<input type="checkbox"/>	• SOUTH KOREA	<input type="checkbox"/>	<input type="checkbox"/>
• BRAZIL	<input type="checkbox"/>	<input type="checkbox"/>	• ITALY	<input type="checkbox"/>	<input type="checkbox"/>	• SPAIN	<input type="checkbox"/>	<input type="checkbox"/>
• CHILE	<input type="checkbox"/>	<input type="checkbox"/>	• JAPAN	<input type="checkbox"/>	<input type="checkbox"/>	• SWEDEN	<input type="checkbox"/>	<input type="checkbox"/>
• CHINA	<input type="checkbox"/>	<input type="checkbox"/>	- OSAKA	<input type="checkbox"/>	<input type="checkbox"/>	• SWITZERLAND	<input type="checkbox"/>	<input type="checkbox"/>
- CHINA A	<input type="checkbox"/>	<input type="checkbox"/>	- TOKYO	<input type="checkbox"/>	<input type="checkbox"/>	• TAWAN	<input type="checkbox"/>	<input type="checkbox"/>
- CHINA B	<input type="checkbox"/>	<input type="checkbox"/>	• LATVIA	<input type="checkbox"/>	<input type="checkbox"/>	• THAILAND	<input type="checkbox"/>	<input type="checkbox"/>
• COLOMBIA	<input type="checkbox"/>	<input type="checkbox"/>	• LUXEMBOURG	<input type="checkbox"/>	<input type="checkbox"/>	• UNITED KINGDOM	<input type="checkbox"/>	<input type="checkbox"/>
• CZECH REPUBLIC	<input type="checkbox"/>	<input type="checkbox"/>	• MALAYSIA	<input type="checkbox"/>	<input type="checkbox"/>	- BIRMINGHAM	<input type="checkbox"/>	<input type="checkbox"/>
• DENMARK	<input type="checkbox"/>	<input type="checkbox"/>	• MEXICO	<input type="checkbox"/>	<input type="checkbox"/>	- GLASGOW	<input type="checkbox"/>	<input type="checkbox"/>
• ESTONIA	<input type="checkbox"/>	<input type="checkbox"/>	- GUADALAJARA (JAL)	<input type="checkbox"/>	<input type="checkbox"/>	- LEEDS	<input type="checkbox"/>	<input type="checkbox"/>
• FINLAND	<input type="checkbox"/>	<input type="checkbox"/>	- MEXICO CITY	<input type="checkbox"/>	<input type="checkbox"/>	- LONDON	<input type="checkbox"/>	<input type="checkbox"/>
• FRANCE	<input type="checkbox"/>	<input type="checkbox"/>	- MONTERREY	<input type="checkbox"/>	<input type="checkbox"/>	- MANCHESTER	<input type="checkbox"/>	<input type="checkbox"/>
- LYON	<input type="checkbox"/>	<input type="checkbox"/>	• NETHERLANDS	<input type="checkbox"/>	<input type="checkbox"/>	• URUGUAY	<input type="checkbox"/>	<input type="checkbox"/>
- MARSEILLE	<input type="checkbox"/>	<input type="checkbox"/>	• NEW ZEALAND	<input type="checkbox"/>	<input type="checkbox"/>	• USA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
- PARIS	<input type="checkbox"/>	<input type="checkbox"/>	• NORWAY	<input type="checkbox"/>	<input type="checkbox"/>	• VENEZUELA	<input type="checkbox"/>	<input type="checkbox"/>
• GERMANY	<input type="checkbox"/>	<input type="checkbox"/>	• POLAND	<input type="checkbox"/>	<input type="checkbox"/>			

Number of participants using the US Toll number?

14. Click 'Next' or open the Features window. There are a few features you must select before you can Submit your reservation request.

Attended - One Time

Logistics

What is the date and time for your conference? :

ASAP Call (Your call will start within 20 minutes of submitting this request.)

What is the expected duration of your conference? :

How would you like your participants to access your conference?
 Dial-In Only Operator Dial-Out Only Combination

How many dial-in participants will be joining?

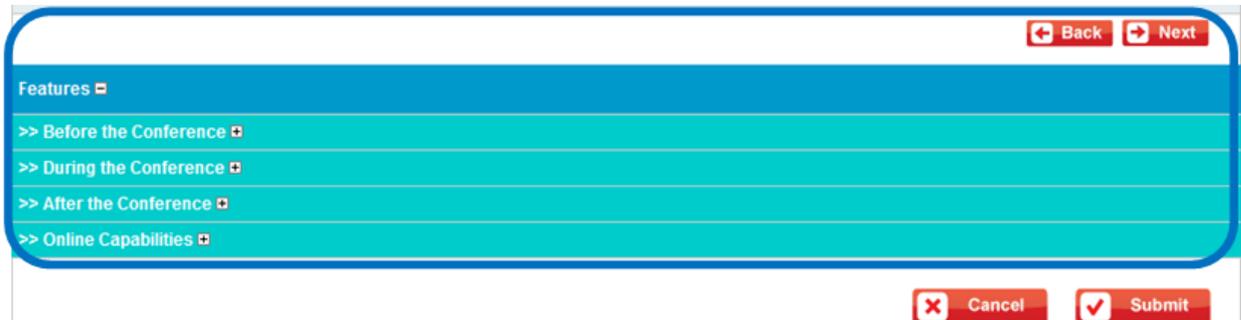
How would you like participants to dial into the conference?
 US Toll-Free US Toll (also available for international users) Global Access IT

Number of participants using the US Toll number?

Company ID

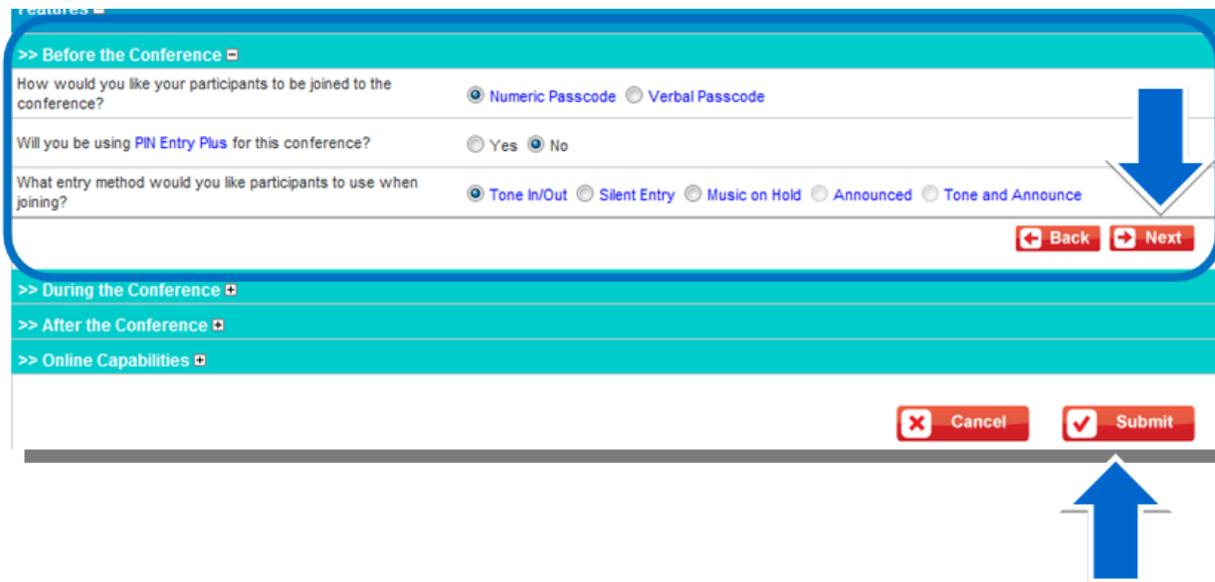
Features
←

15. The features are broken up into a few sections: Before the Conference, During the Conference, After the Conference, and Online Capabilities. The first few times you use the Conference Scheduling Assistant, it is a good idea to look at all the features to become familiar with where they are located. For example, if you want an Operator to record your conference, you'll want to select Conference Recording – located in the 'After the Conference' section.



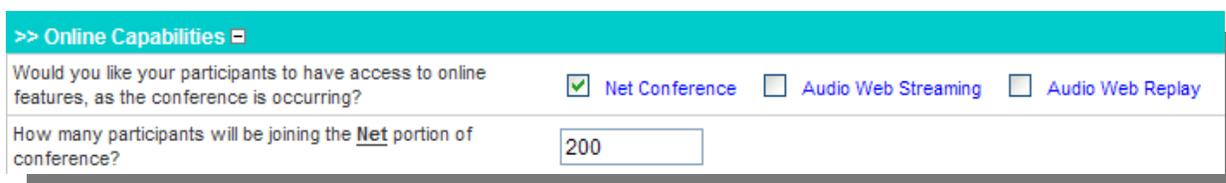
The screenshot shows the 'Features' section of the Conference Scheduling Assistant. It has a blue header with 'Features' and a dropdown arrow. Below the header are four expandable sections: '>> Before the Conference', '>> During the Conference', '>> After the Conference', and '>> Online Capabilities'. At the top right of the section are 'Back' and 'Next' buttons. At the bottom right are 'Cancel' and 'Submit' buttons.

16. You MUST complete the 'Before the Conference' features before you can Submit your reservation.
17. Make the appropriate selections.
- If you don't need any additional features, click Submit.
 - To add additional features click Next or Expand the remaining feature sections.



This screenshot shows the 'Before the Conference' section expanded. It contains three questions with radio button options: 'How would you like your participants to be joined to the conference?' (Numeric Passcode selected), 'Will you be using PIN Entry Plus for this conference?' (No selected), and 'What entry method would you like participants to use when joining?' (Tone In/Out selected). A blue arrow points down from the 'Next' button to the 'Submit' button at the bottom right of the page.

18. Net Conferencing is included with the other Online Capabilities. This option will allow you to add net to an operator assisted conference. Your company may not allow you to schedule Net Conferencing with an Attended call. Please contact your Conferencing Administrator for guidelines.
- If you want to schedule a net conference without an operator, return to Manage My Meetings, and click Add Subscription from the Instant Net Subscription tab.



The screenshot shows the 'Online Capabilities' section expanded. It contains two questions: 'Would you like your participants to have access to online features, as the conference is occurring?' (Net Conference checked) and 'How many participants will be joining the Net portion of conference?' (200 entered in a text box). The 'Audio Web Streaming' and 'Audio Web Replay' options are unchecked.

19. Click Submit to schedule the meeting. You will receive an on screen confirmation.
20. Click OK to return to the Conference Scheduling Assistant main page.

Conference Scheduling Assistant

You have selected Premier features for this conference. A Meeting Manager will contact you to discuss specific details for those features and to ensure the success of your conference.

Type of conference: Premier One Time
 Confirmation number: 3339876
 Leader name: JAMES CUSTOMER
 Number of lines: 200
 Dates: Mar-31-2011
 Start time: 08:15 AM
 Duration: 60 mins
 Entry Type: Music on Hold
 Phone number:

Country	City	Toll-Free	Toll
USA		888-XXX-XXXX	1-630-XXX-XXXX

Passcode: Earnings

Features List:

1	Meeting Manager
2	Listen Only
3	Participant Screening
4	Q & A
5	Meeting View
6	Conference Monitoring
7	Instant Replay
8	Conference Recording
9	Participant List
10	Net Conference

[To view all details entered for this conference, please click here.](#)

Your confirmation will be e-mailed to the leader e-mail address listed in your profile.

Calls must be cancelled at least 30 minutes prior to the start time to avoid cancellation fees.



21. Your reservation will now appear on the main page and the process has been completed.
22. To modify/cancel the conference at any time, click on the appropriate option below.

Conference Scheduling Assistant

Current Conferences Completed / Cancelled 

From: 03/07/2011 To: 04/07/2011

	Start Date	Conference Type	Leader Name	Confirmation Number	Meeting Name	Phone Number(s)	Participant Passcode	Leader Passcode
	Mar-31-2011 08:15 AM CT	Premier	JAMES CUSTOMER	3339876		1-630-XXX-XXXX 888-XXX-XXXX	Earnings	1XXXXX