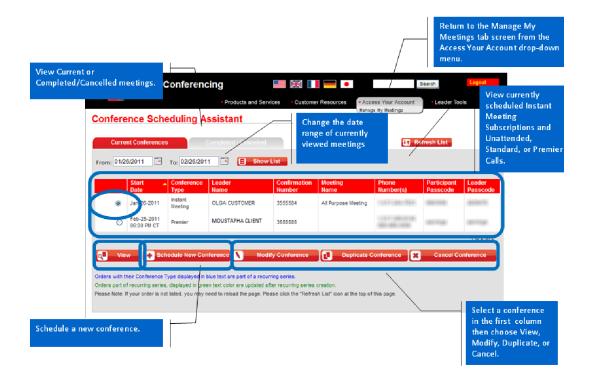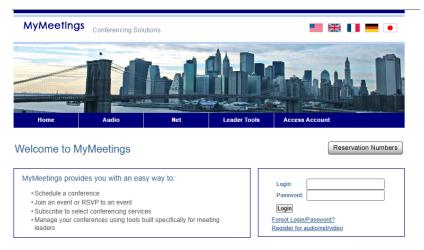# Conference Scheduling Assistant End User Guide

Audio Conferencing

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.
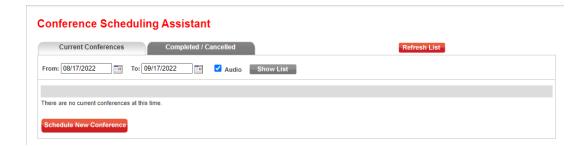
To begin using Conference Scheduling Assistant (CSA)

1. Go to www.e-meetings.verizonbusiness.com

2. Launch CSA from Leader Tools or click or the "Conference Scheduling Assistant" link

3. Enter your login name and password
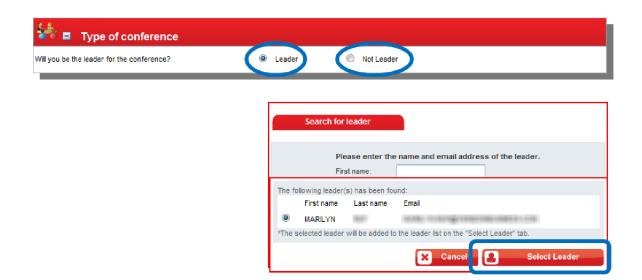

4. Once you log in, click on Schedule New Conference

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'
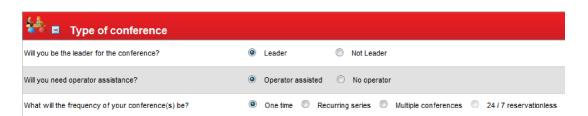
- The 'Search for Leader' window opens. You must enter First Name, Last Name, and correct email address. Click Search for Leader.

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

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'.

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?
    ● 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.

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.

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.

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

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.

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.

18. Click Submit to schedule the meeting. You will receive an on-screen confirmation.

19. 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.

[Cancel Conference] [Modify Conference] [Print] [OK]

20. Your reservation will now appear on the main page and the process has been completed.

21. To modify/cancel the conference at any time, click on the appropriate option below.

Conference Scheduling Assistant

Current Conferences	Completed / Cancelled				Refresh List			

From: 03/07/2011 To: 04/07/2011 [Show List]

	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

[View] [Schedule New Conference] [Modify Conference] [Duplicate Conference] [Cancel Conference]