

# 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.

The screenshot displays the Conference Scheduling Assistant (CSA) web interface. The top navigation bar includes links for Products and Services, Customer Resources, Access Your Account, and Leader Tools. The main content area is titled "Conference Scheduling Assistant" and features tabs for Current Conferences, Completed, and Cancelled. A date range selector is set from 01/26/2011 to 02/26/2011, with a "Show List" button. A "Refresh List" button is also present. Below the date range, a table lists conferences with columns for Start Date, Conference Type, Leader Name, Confirmation Number, Meeting Name, Phone Number(s), Participant Passcode, and Leader Passcode. The first row shows an "Instant Meeting" for "OLGA CUSTOMER" on Jan-26-2011. The second row shows a "Premier" meeting for "MOUSTAPHA CLIENT" on Feb-25-2011. Below the table, there are buttons for View, Schedule New Conference, Modify Conference, Duplicate Conference, and Cancel Conference. A "View Current or Completed/Cancelled meetings." callout points to the "View" button. A "Return to the Manage My Meetings tab screen from the Access Your Account drop-down menu." callout points to the "Access Your Account" link. A "View currently scheduled Instant Meeting Subscriptions and Unattended, Standard, or Premier Calls." callout points to the "Instant Meeting" row. A "Change the date range of currently viewed meetings" callout points to the date range selector. A "Schedule a new conference." callout points to the "Schedule New Conference" button. A "Select a conference in the first column then choose View, Modify, Duplicate, or Cancel." callout points to the first column of the table.

View Current or Completed/Cancelled meetings.

Return to the Manage My Meetings tab screen from the Access Your Account drop-down menu.

View currently scheduled Instant Meeting Subscriptions and Unattended, Standard, or Premier Calls.

Change the date range of currently viewed meetings

Refresh List

Start Date	Conference Type	Leader Name	Confirmation Number	Meeting Name	Phone Number(s)	Participant Passcode	Leader Passcode
Jan-26-2011	Instant Meeting	OLGA CUSTOMER	3555584	All Purpose Meeting	1-800-855-5555	12345678	12345678
Feb-25-2011 06:00 PM CT	Premier	MOUSTAPHA CLIENT	3555585		1-800-855-5555	12345678	12345678

View | Schedule New Conference | Modify Conference | Duplicate Conference | Cancel Conference

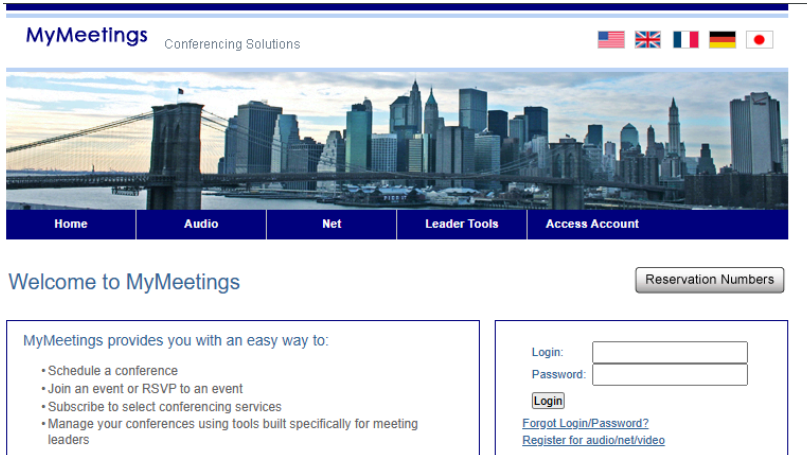
Orders with their Conference Type displayed in blue text are part of a recurring series.  
Orders part of recurring series, displayed in green text color are updated after recurring series creation.  
Please Note: If your order is not listed, you may need to reload the page. Please click the "Refresh List" icon at the top of this page.

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.e-meetings.verizonbusiness.com](http://www.e-meetings.verizonbusiness.com)
2. Launch CSA from Leader Tools or click on the “Conference Scheduling Assistant” link
3. Enter your login name and password



The screenshot shows the MyMeetings website. At the top, there's a header with the MyMeetings logo and "Conferencing Solutions" text. To the right of the header are flags for the United States, United Kingdom, France, Germany, and Japan. Below the header is a large banner image of a city skyline with a bridge. Underneath the banner is a navigation bar with links: Home, Audio, Net, Leader Tools, and Access Account. Below the navigation bar, it says "Welcome to MyMeetings" and there's a "Reservation Numbers" button. On the left, a box titled "MyMeetings provides you with an easy way to:" lists several services. On the right, there's a login section with fields for "Login:" and "Password:", a "Login" button, and links for "Forgot Login/Password?" and "Register for audio/net/video".

MyMeetings Conferencing Solutions

Home Audio Net Leader Tools Access Account

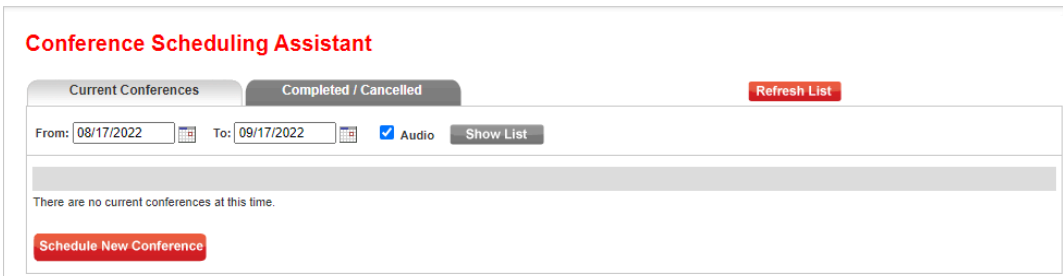
Welcome to MyMeetings [Reservation Numbers](#)

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

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



The screenshot shows the "Conference Scheduling Assistant" interface. At the top, it says "Conference Scheduling Assistant" in red. Below that, there are two tabs: "Current Conferences" and "Completed / Cancelled". To the right of the tabs is a "Refresh List" button. Below the tabs, there are input fields for "From:" (08/17/2022) and "To:" (09/17/2022), a checkbox for "Audio" which is checked, and a "Show List" button. Below these fields, there's a message that says "There are no current conferences at this time." At the bottom, there's a "Schedule New Conference" button.

Conference Scheduling Assistant

Current Conferences Completed / Cancelled [Refresh List](#)

From: 08/17/2022 To: 09/17/2022 ☒ Audio [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"/> MARILYN		

\*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?

- 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	

**Add Participant**

**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

**Back** **Next**

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"/>	• TAIWAN	<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"/>	• PANAMA	<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?   PM

☐ 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.

This screenshot shows the 'Features' section of the Conference Scheduling Assistant. At the top right are 'Back' and 'Next' buttons. Below the 'Features' header is a list of expandable sections: '>> Before the Conference', '>> During the Conference', '>> After the Conference', and '>> Online Capabilities'. 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.

#### Conference Scheduling Assistant

This screenshot shows the main configuration page of the Conference Scheduling Assistant. At the top left is a 'Conference List' link. The page is divided into several sections: 'Type of conference' (with 'Attended - One Time' selected), 'Logistics', 'Audio Features', and 'Before the Conference'. The 'Before the Conference' section is expanded, showing options for how participants join (Numeric Passcode is selected), whether to use PIN Entry Plus, and what entry method to use (Tone In/Out, Silent Entry, Music on Hold, Announced, or Tone and Announce). There is also a 'Platinum Premier' option. At the bottom right are 'Back' and 'Next' buttons, and at the very bottom are 'Cancel' and 'Submit' buttons.

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: USA City: Toll-Free: 888-XXX-XXXX Toll: 1-833-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	Hot 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.

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	<a href="#">3339876</a>		1-630-XXX-XXXX 888-XXX-XXXX	Earnings	1XXXXX

