

Verizon Collaboration Plug-In for
Microsoft® Outlook
User Guide

Version 4.11

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Overview

Verizon Business Conferencing integration with Microsoft Outlook enables you to schedule meetings, start meetings, and send meeting invitations for an audio or net conference directly from Outlook. You can manage single or multiple conferencing subscriptions and import or manually add your audio and net conference details into the plug-in using your *Manage My Meetings* login credentials. Start meetings and send meeting invitations from Microsoft Outlook that includes audio and/or net conference details as well as a click-to-join link. Once in conference, you have access to your Verizon audio conference call control features using touch-tone commands or online through your Instant Meeting Web Moderator web-based call management tool.

You can also manage some of your ICP call management features, create and use speed dials, access voice mail, and view your call logs.

System Requirements

The Verizon Collaboration Plug-in for Microsoft Outlook is supported on the following platforms:

- Microsoft Windows XP®
- Microsoft Windows Vista®
- Microsoft Windows 7®

Training/User Guides

Training and user guides are available at <https://customertraining.verizonbusiness.com>. There are administrator and subscriber user guides, as well as a guide for your SIP phone.


Download the Toolbar

1. Go to <http://www.mymeetings.com>. The *MyMeetings* site opens in a browser window.



Figure 1-1: MyMeetings

2. Select **Leader Tools | Collaboration Plug-ins** from the menu at the top of the page. The *Collaboration Plug-ins* screen appears.

MyMeetings Conferencing Solutions 

[Home](#) [Audio](#) [Net](#) [Video](#) [Leader Tools](#) [Access Account](#)

Collaboration Plug-ins

Select the Interface you would like to Download

| Interfaces | Operating System Compatibility | Interface Compatibility | Link to Download |
|-------------------------------|--|------------------------------------|---|
| Microsoft Outlook | Microsoft Windows XP, Microsoft Windows Vista, Microsoft Windows 7 | Outlook 2003 and 2007 | Download Now (English Only) |
| Microsoft Office Communicator | Microsoft Windows XP, Microsoft Windows Vista, Microsoft Windows 7 | MOC 2007 R1 and R2 | Download Now (English Only) |
| IBM Same time | Microsoft Windows XP, Microsoft Windows Vista, Microsoft Windows 7 | IBM Same time 8.0.1, 8.0.2 and 8.5 | Download Now |
| Lotus Notes | Microsoft Windows XP, Microsoft Windows Vista, Microsoft Windows 7 | IBM Lotus Notes 8.0.1 and 8.5.1 | Download Now |

Figure 1-2: Collaboration Plug-ins

- Click **Download Now** next to *Microsoft Outlook*. The *Leader Login* screen appears.

Getting Started

MyMeetings Conferencing Solutions

Home Audio Net Video Leader Tools Access Account

Leader Login

Login to manage your account online, schedule conference calls online, update your profile, subscribe to or alter Instant Meeting or Instant Net subscriptions, and more!

Conferencing Leader Login - take your meetings to the web!

Your Login Information

* Login and Password are case sensitive.

Login:

Password:

Open an Account
Register to manage your account online in as little as 5 minutes. Register now for [audio/net](#) or [video](#).

After you register for a Login Name and Password, you will be able to schedule conference calls online, update your preferences, subscribe to or alter Instant Meeting and Instant Net subscriptions, and more.

Forgot Login/Password?
Use the automatic [login/password retrieval](#) feature to obtain your existing login name or to reset your password.

Figure 1-3: Leader Login

4. Enter your *Login* and *Password*.
5. Click **Login**. The security policy screen appears.
6. Click **Continue**. The *Download Verizon Collaboration Plug-in for Microsoft Office Communicator 2007* screen appears.

Note: You can also download the plug-in after logging in by selecting **Leader Tools | Collaboration Plug-ins** at the top of the screen.



The screenshot shows the MyMeetings website interface. At the top, there is a navigation bar with the MyMeetings logo and "Confereencing Solutions" text, along with flags for the United States, United Kingdom, France, Germany, and Japan. Below the navigation bar, there is a menu with options: Home, Audio, Net, Video, Leader Tools, and Access Account. The main content area features a heading "Download Verizon Collaboration Plug-In for Microsoft Office Communicator 2007". Below this heading is a form titled "Your profile Information". The form contains several input fields for personal and company details, including First Name, Middle Name, Last Name, Company Name, Address Line 1, Address Line 2, City, Country, State, Zip Code, Email, Phone, and Wireless. A note below the form states: "Note: All fields marked * symbol are required." There are two checkboxes: the first is for agreeing to the privacy policy, and the second is for downloading the previous version of the toolbar. A "Continue" button is located at the bottom of the form.

| | |
|------------------|---------------------------------|
| First Name*: | MINDY |
| Middle Name: | |
| Last Name*: | NORTH |
| Company Name*: | VERIZON BUSINESS |
| Address Line 1*: | 2424 GARDEN OF THE GODS RD |
| Address Line 2: | C1-507 |
| City*: | COLORADO SPRINGS |
| Country*: | UNITED STATES OF AMERICA |
| State*: | COLORADO |
| Zip Code*: | 80919-3172 |
| Email*: | MINDY.NORTH@VERIZONBUSINESS.COM |
| Phone*: | 719-535-5555 |
| Wireless: | |

Note: All fields marked * symbol are required.

I have read and agree to the Conferencing [Privacy policy](#). Please note that if you do not indicate your agreement by checking the box, you will not be able to proceed.

For a period of time you may still download and use the previous version of the toolbar. This is not recommended unless your organization has requested you do so. Selecting the checkbox will enable download of this version.

Figure 1-4: Profile Information

7. Complete your profile information.
8. Check that you have read and agreed to the privacy policy.
9. Click **Continue**. The *System Requirements* screen appears.
10. Check that you have read the terms and conditions.
11. Click **Download**.
12. Follow the instructions on the screen for installing the toolbar.

Smart Tag Guidelines

Follow the steps below if smart tags are not enabled by default after installing the Verizon Collaboration Plug-in for Outlook. This applies for Outlook 2003.

1. Open Word 2007.
2. Click the **Office** button | **Word Options**. The *Word Options* screen appears.

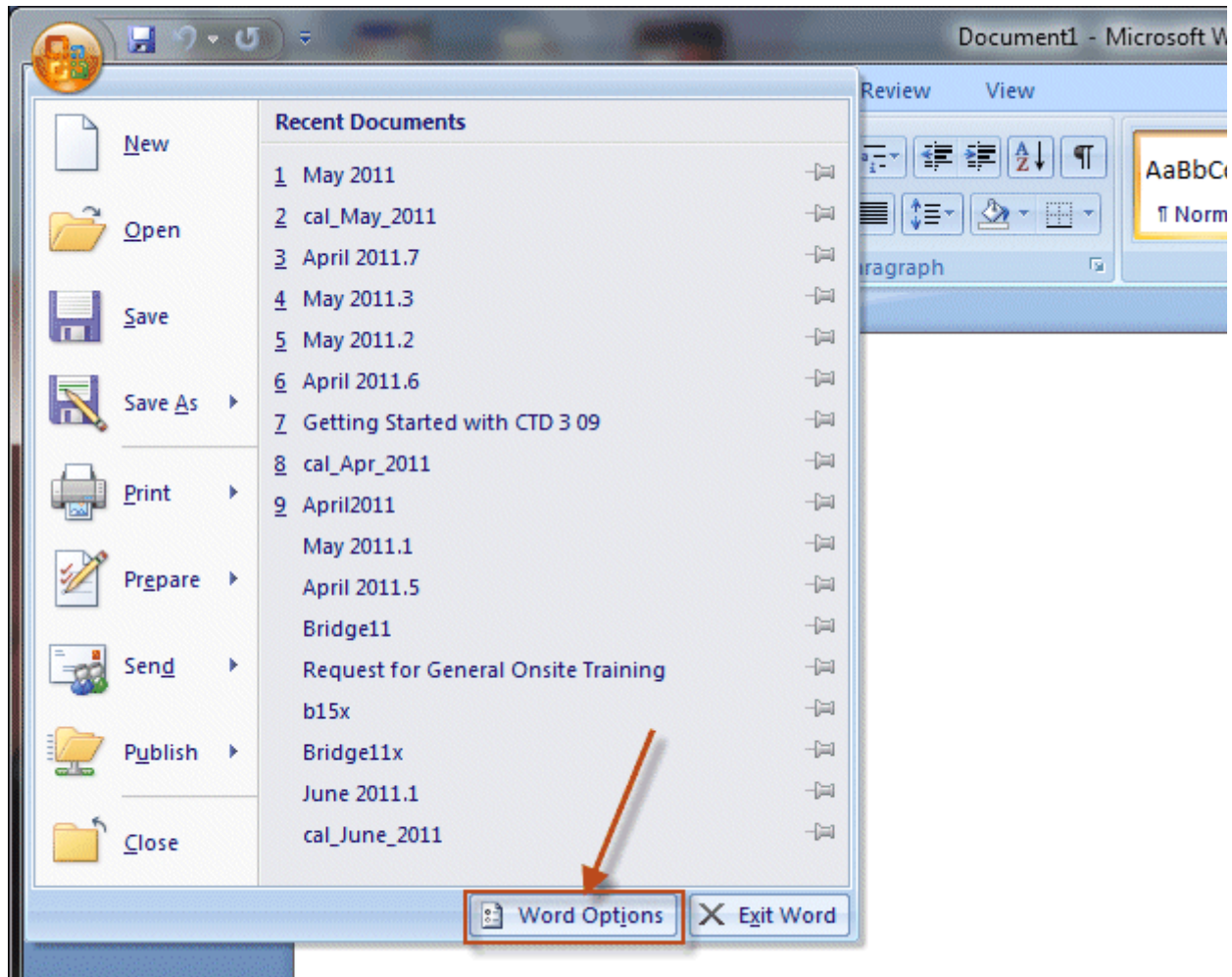


Figure 1-5: Microsoft Word

3. Click **AutoCorrect Options**. The *AutoCorrect* screen appears.

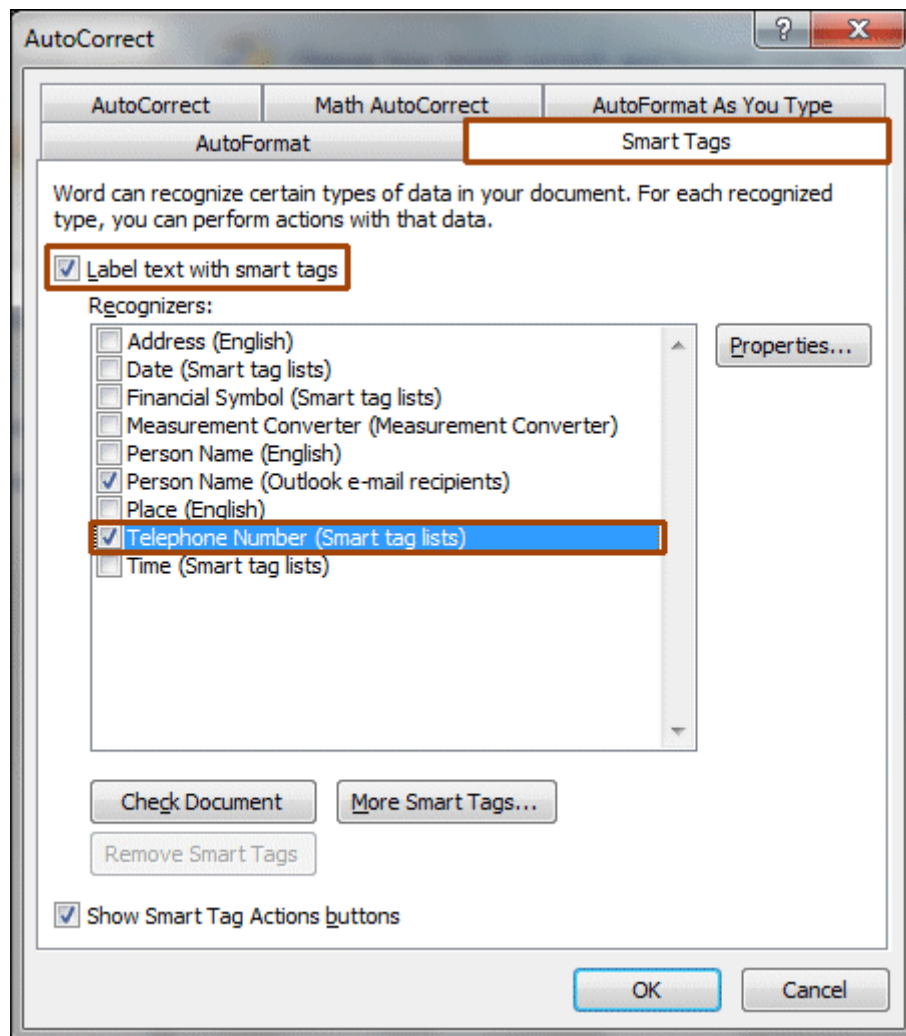


Figure 1-6: Auto Correct - Smart Tags Tab

4. Click the **Smart Tags** tab.
5. Check **Label text with smart tags**.
6. Check **Telephone Number (VzUCC)**.
7. Click **OK**. The *Word Options* screen reappears.
8. Click **OK** to close the *Word Options* screen.
9. Open **Outlook**.
10. Go to **Tools | Options**. The *Options* screen appears.

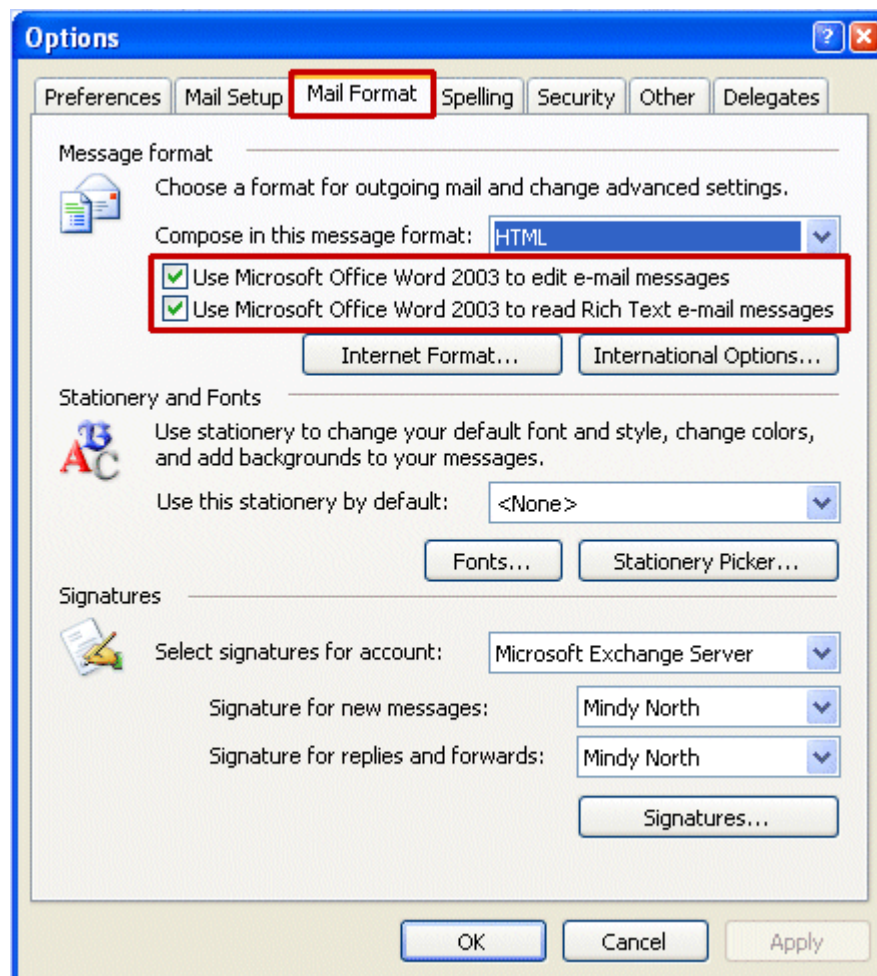


Figure 1-7: Options - Mail Format Tab

11. Click the **Mail Format** tab.
12. Check both options for using **Microsoft Office 2003** under *Message Format*.
13. Click **OK** to close the *Options* window.

PREFERENCES

2

Before using the Verizon Collaboration Plug-in toolbar, it is a good idea to set your preferences.

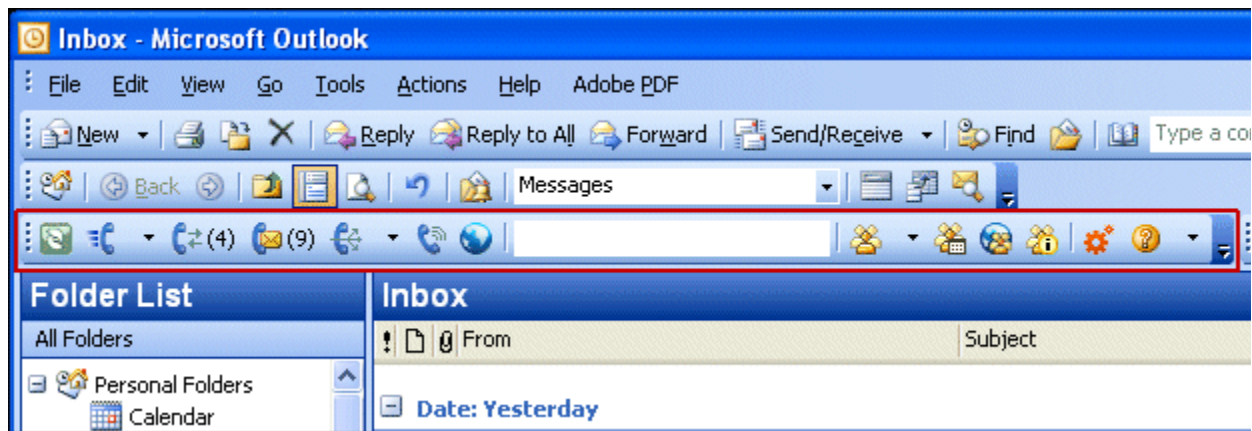



Figure 2-1: Microsoft Outlook

1. Click the  icon on the toolbar. The *Preferences* screen opens in a new window displaying the *General Settings* tab.

Preferences

General Settings

Enter your login credentials and select your preferred language. You must enter valid ICP credentials to use the features of the toolbar. You must also enter valid Conferencing credentials to use the Conferencing features.

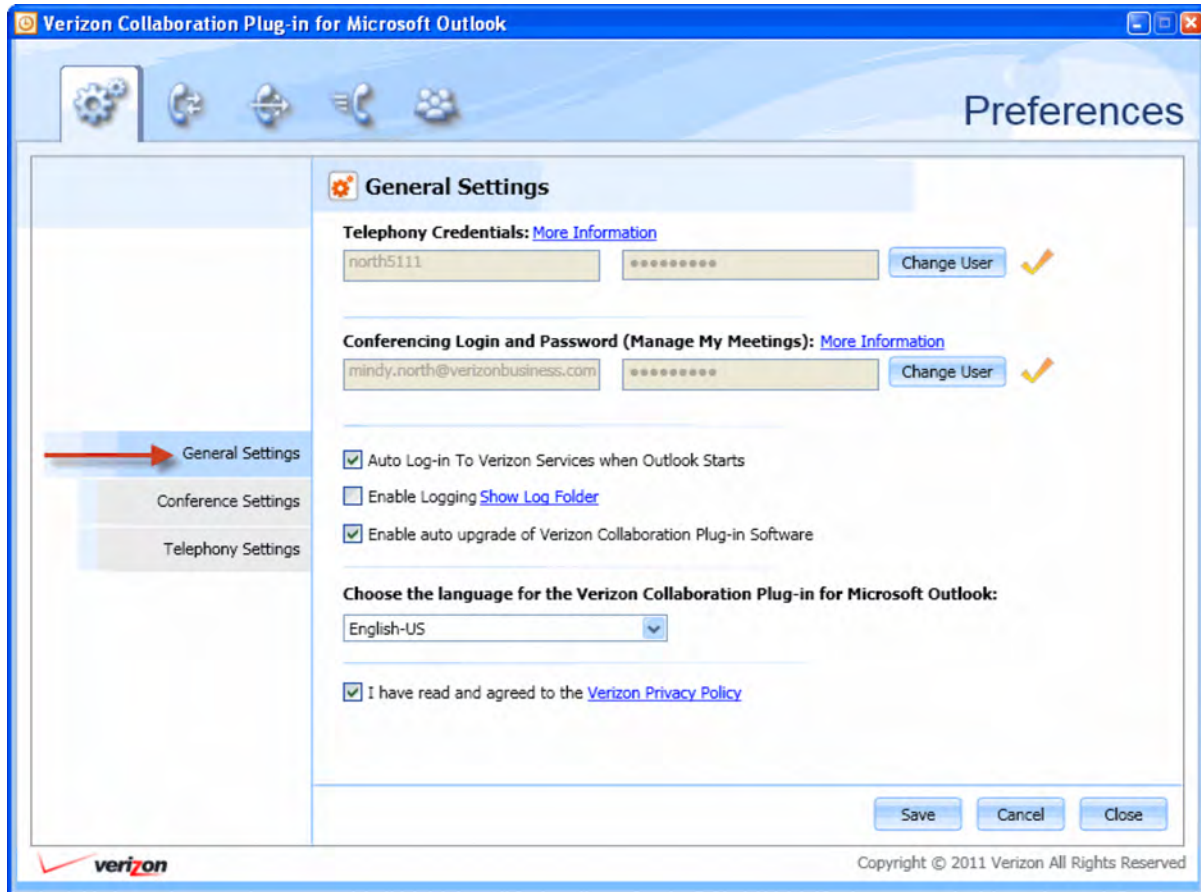


Figure 2-2: Preferences - General Settings

1. Enter your ICP user ID and password in the *Telephony Credentials* fields. If you are conferencing only, you will only see the conferencing icons. You will not see any grayed out telephony icons unless you are not actively logged in.
2. Enter your Conferencing user ID and password in the *Conferencing Login and Password (Manage My Meetings)* fields. If you do not have a conferencing account you will not see the conferencing icons on the toolbar.
3. Check **Auto Log-in to Verizon Telephony Services when Outlook starts** to automatically log in with your ICP user ID and password when you open Outlook.
4. Check **Enable Logging** to keep a list of logging or error codes.

5. Check **Enable auto upgrade of Verizon Collaboration Software** to automatically receive updates.
6. Select your preferred language from the drop-down list. The default is English.
7. Read the **Verizon Privacy Policy**.
8. Check the **I have read and agreed to the Verizon Privacy Policy** box.
9. Click **Save**. When your credentials are validated, a check mark appears next to the fields. You will see a red X next to credentials that cannot be validated. Contact your administrator if you do not now your ICP or Conferencing credentials.

Conference Settings

1. Click **Conference Settings** on the left in the *Preferences* window. The *Conference Settings* screen appears.

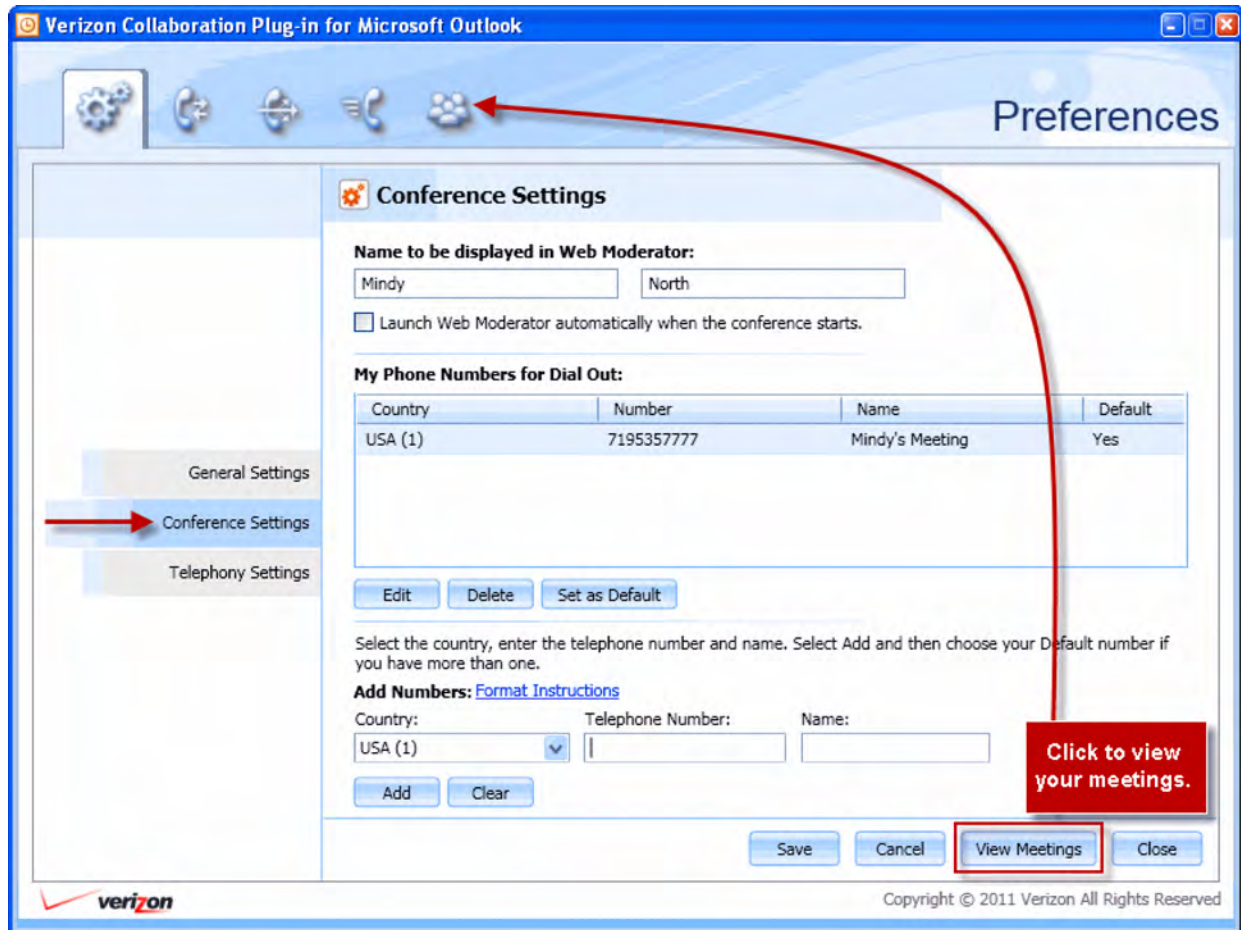


Figure 2-3: Preferences - Conference Settings

2. Enter the name you want displayed in the Instant Meeting Web Moderator.
3. Check **Launch Web Moderator automatically when conference starts**, if applicable. Refer to the online help in the Web Moderator for instructions on using this tool.

Add/Edit/Delete Dial Out Numbers

Add

1. Select the country from the *Country* drop-down list.
2. Enter a participant number you want dialed back in the *Telephone* field at the bottom of the screen. Do not enter any spaces or dashes (U.S. 5554567890). For international numbers, the normal national format should be used including the leading zero, if applicable (UK: 2079460555).
3. Enter the *Name*.
4. Click **Add**. The number is added to the *My Phone Numbers for Dial Out* list.
5. Repeat steps 1 - 4 to add additional numbers.

Edit

1. Select a number from the *My Phone Numbers for Dial Out* list.
2. Click **Edit**. The *Country*, *Telephone*, and *Name* appear in the fields at the bottom of the screen.
3. Make the necessary changes.
4. Click **Add**. The dial number is changed in the list.

Delete

1. Select a number from the *Dial Back List*.
2. Click **Delete**. A pop-up confirmation appears.
3. Click **OK**. The number is permanently removed.

Telephony Settings

You can select your softphone or hard phone as the default device to answer incoming calls, as well as forward incoming voice mails.

1. Click **Telephony Settings** on the left in the *Preferences* window. The *Telephony Settings* screen appears.

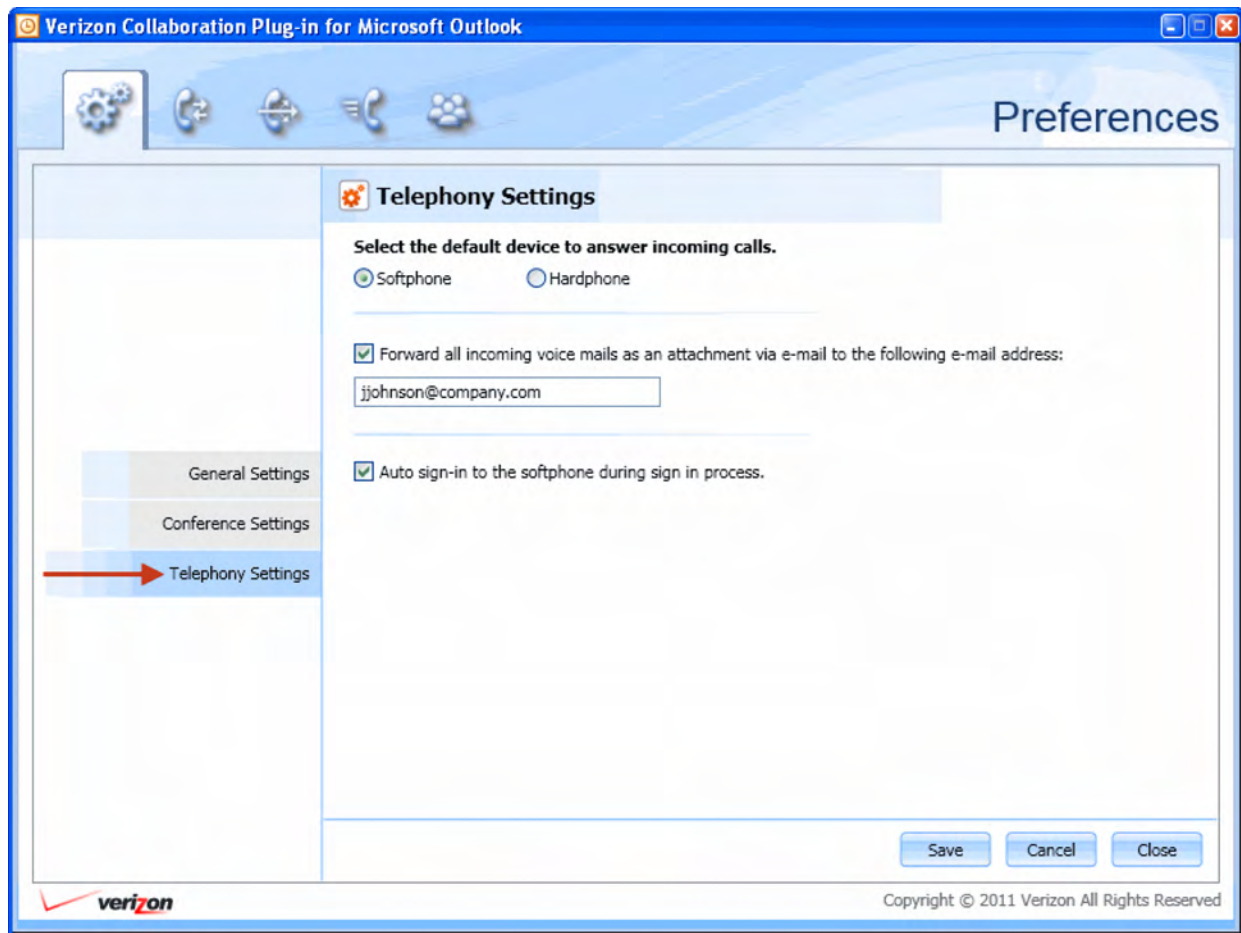


Figure 2-4: Preferences - Telephony Settings

2. Select **Softphone** or **Hard phone** as the default phone you want to answer incoming calls.
3. Check **Forward all incoming voice mails as an attachment via e-mail to the following e-mail address** and enter an email address, if applicable. This allows you to have your voice messages emailed to you, which you can open and listen to.
4. Check **Auto sign-in to the softphone during sign in process** if you want to automatically sign in to your softphone.
5. Click **Save**.

Call Logs

You can view your inbound/outbound calls and voice mail.

1. Click the  tab. The *Calls Logs* screen appears.

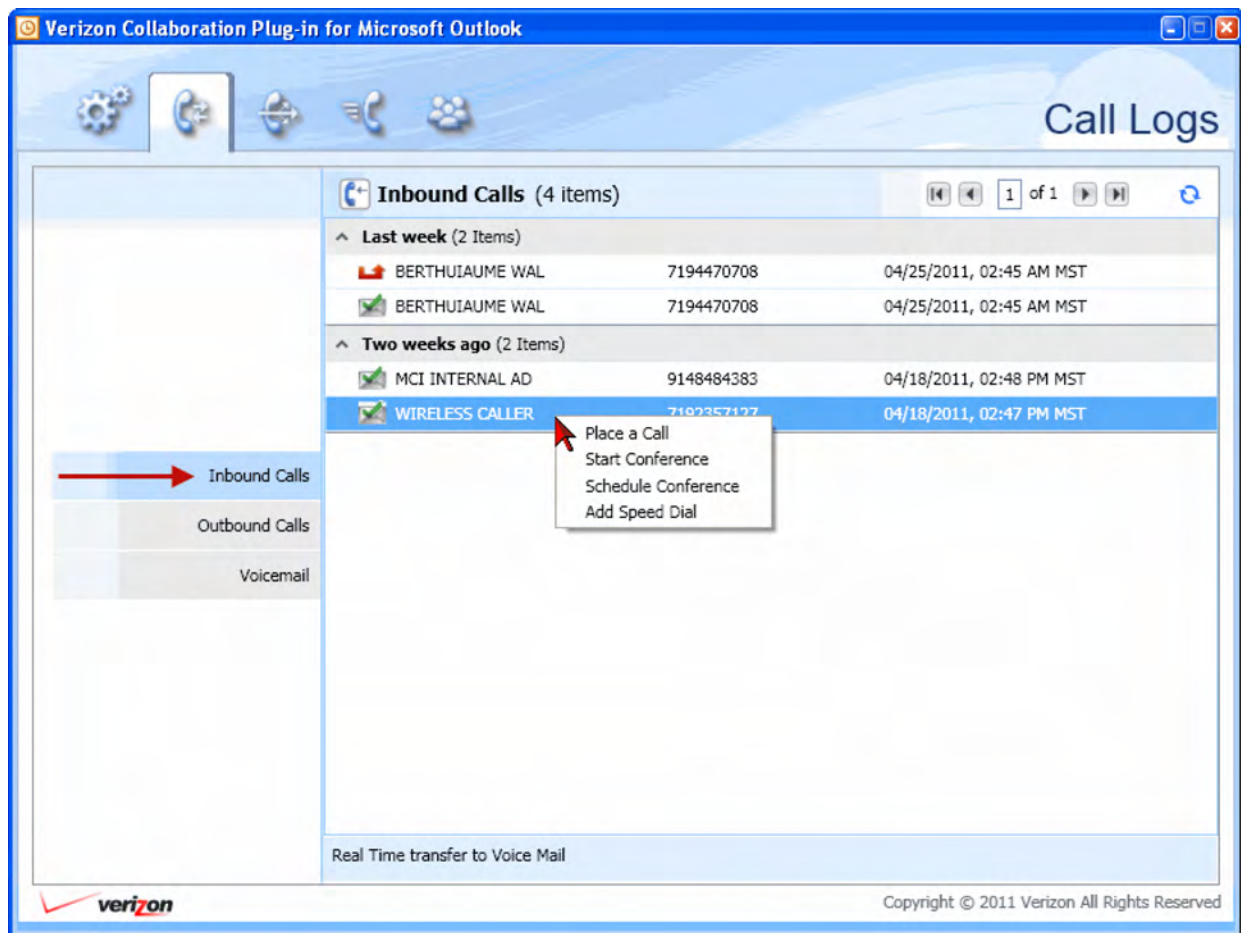


Figure 2-5: Call Logs - Inbound Calls

2. Click **Inbound Calls** on the left to view all of your incoming calls; answered and missed.
-OR-
Click **Outbound Calls** on the left to view all of your outgoing calls placed from your softphone or hard phone.
3. Right-click on an inbound or outbound call to place a call, start a conference, schedule a conference, or add to your speed dial list.
-OR-
Click **Voicemail** on the left to access and play your voice mails. The *Voice Mails* screen appears.

Preferences

Voice Mails

You can access your voice mails on the *Call Logs* tab. You can play them, save them, send as an email attachment, or delete. You can also access your Inbox online and change your PIN.

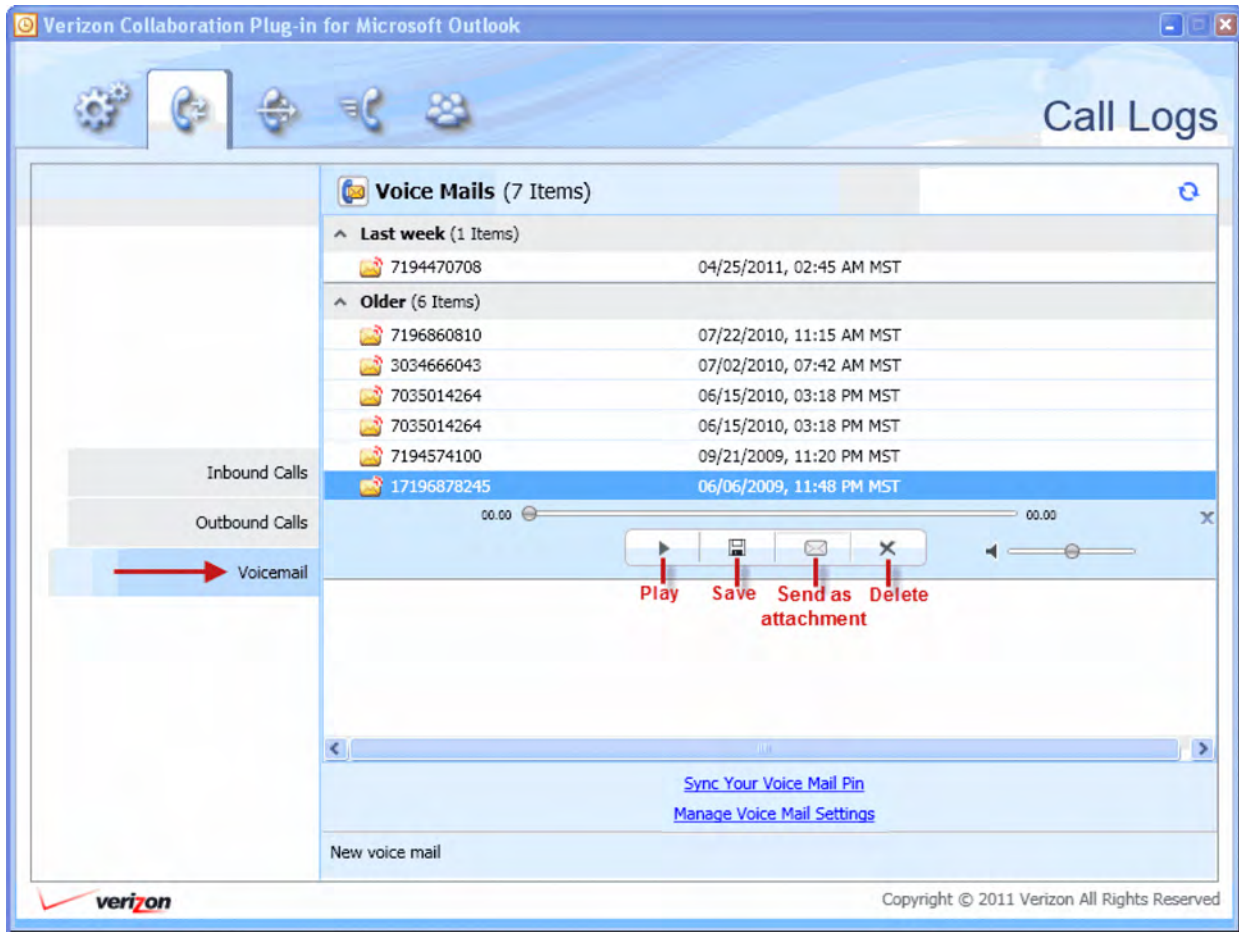


Figure 2-6: Voice Mails

1. Select a voice mail. Options appear under the voice mail.
2. Click ▶ to play the voice mail.
3. Click 📁 to save the voice mail.
4. Click ✉ to send the voice mail as an email attachment.
5. Click ✕ to delete the voice mail.
6. Click **Sync Your Voice Mail PIN** to open the *Voice Mail Retrieval Settings* screen in your ICP Web account to update your voice mail PIN. This is the PIN you enter when you call in to check your voice mail.
7. Click **Manage Voice Mail Settings** to open your voice mailbox in a browser window. Refer to the Voice Mail User Guide for instructions on managing your voice mail over the web.

Call Management

You can enable, disable, and configure some of your ICP call management features using the toolbar.

1. Click the  icon. The *Call Management - Auto Callback* screen appears.

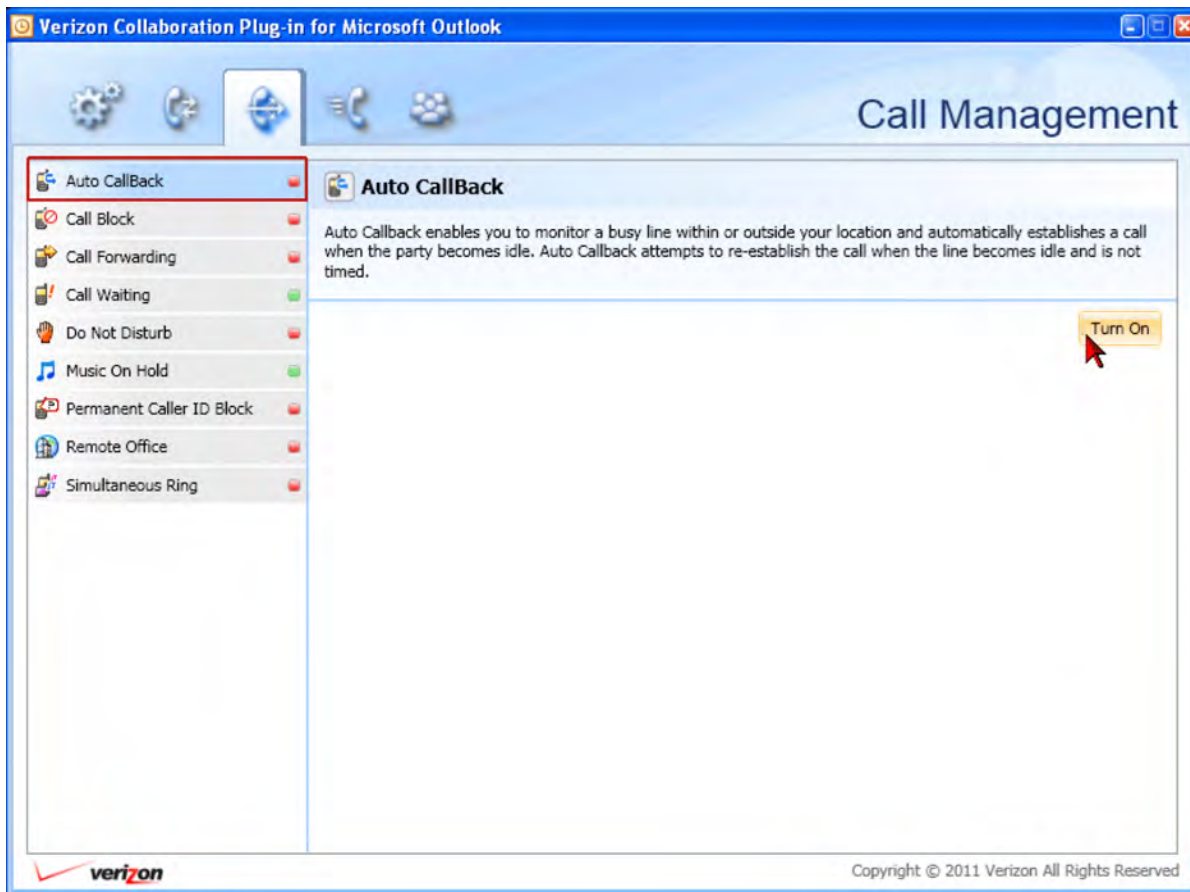


Figure 2-7: Call Management - Auto Callback

Auto Callback

The *Auto Callback* feature enables you to monitor a busy line within or outside your location and automatically establishes a call when the party becomes idle. When you place a call to a line that is busy, you will hear an announcement asking if you want to monitor the line and be called back when it becomes idle. Auto Callback attempts to re-establish the call when the line becomes idle and is not timed.

1. Click **Turn On** to activate Auto Callback.

-OR-

Click **Turn Off** to disable Auto Callback.

Call Block

Call blocking enables you to reject calls from the phone numbers you specify, or from callers who blocked the display of their number on your caller ID (private numbers). The system plays an announcement to rejected callers informing them that you are not accepting calls from unidentified callers. Your phone does not ring and you do not receive any indication that they called. This only applies to calls outside of your location.

1. Click **Call Block** on the left.

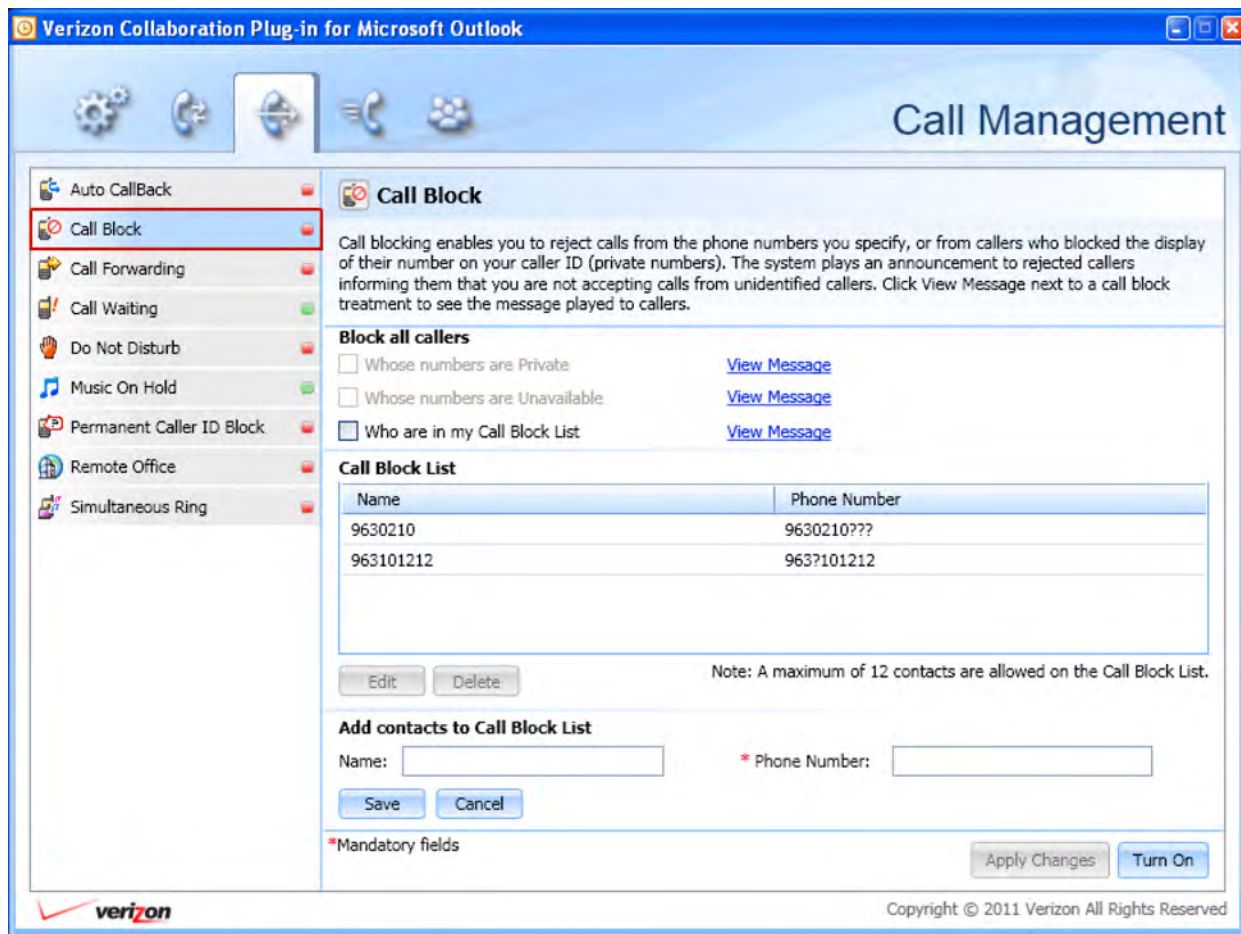


Figure 2-8: Call Management - Call Block

2. Check one or all of the following under *Block all Callers*:
 - **Whose numbers are Private**
 - **Whose numbers are Unavailable**
 - **Whose numbers are in my Call Block List**
3. Click **View Message** to see the message played to callers for each option.
4. Enter a *Name* and *Phone Number* to add a contact to the *Call Block List*.

5. Click **Save**.
6. Repeat steps 4 -5 to add additional contacts.
7. Select a contact in the *Call Block List* and click **Edit** to modify the name and/or phone number.
8. Select a contact in the *Call Block List* and click **Delete** to remove them from the list.
9. Click **Turn On** to enable Call Block.
-OR-
Click **Turn Off** to disable Call Block.
10. Click **Apply Changes**.

Call Forwarding

Call Forwarding enables you to forward incoming calls to a different phone number, such as your home phone, cell phone, or an assistant. You can also use the ring splash to make your office phone emit a short ring burst to inform you when a call is forwarded. This is useful if you forgot the service is turned on and you are at your desk and are receiving calls. Call Forwarding can be internal or external depending on how your administrator configured call restrictions. You can also enable *Call Forwarding Busy* and *Call Forwarding No Answer* if you do not want every call forwarded.

Call Forwarding Always Activation *72

Call Forwarding Always Deactivation *73

Call Forwarding No Answer Activation: *92

Call Forwarding No Answer Deactivation: *93

Call Forwarding Busy Activation: *90

Call Forwarding Busy Deactivation: *91

1. Click **Call Forwarding** on the left.



Figure 2-9: Call Management - Call Forwarding

2. Select **Forward My Calls** to forward ALL incoming calls. Your office number is displayed underneath this option.
3. Select the number to which you want to forward calls from the *To* drop-down list. These are the numbers you create on the *Manage Destination Numbers* screen (see next page).
4. Select **Enable ring splash for this feature** if you want your office phone to emit a short ring burst to inform you when a call is forwarded.

-OR-

Select **Advanced Call Forwarding** to enable *Call Forwarding Busy* and/or *Call Forwarding No Answer* if you do not want every call forwarded.

5. Select **If (your phone #) is busy forward to** and select a number from the drop-down list. Do not select this option if you want to forward ALL calls.

-AND/OR-

Select **If (your phone #) does not answer forward to** and select a number from the drop-down list. Do not select this option if you want to forward ALL calls.

6. Select between **None** and **6** rings from the *Rings before forwarding* drop-down list.

Manage Destination Numbers

7. Click **Manage Destination Numbers** to manage your list of numbers to which you want to forward your calls. The *Manage Destination Numbers* screen appears.

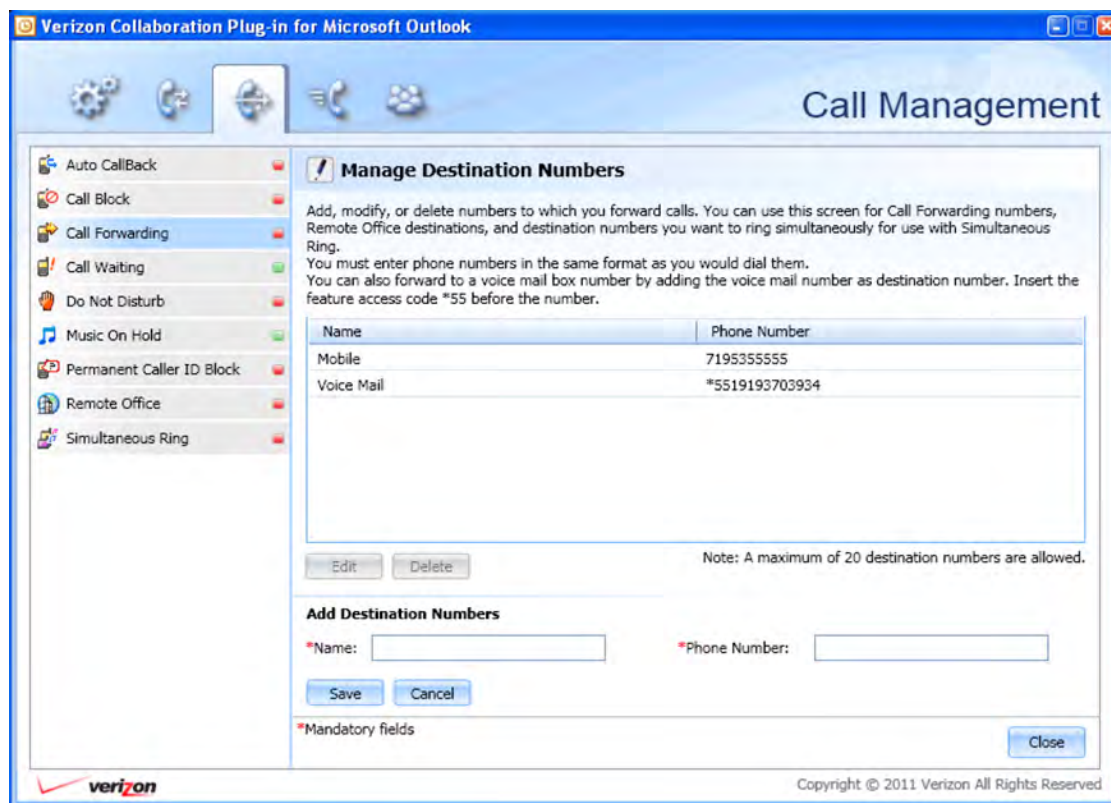


Figure 2-10: Call Management - Manage Destination Numbers

Preferences

8. Enter a *Name* and *Phone Number* to add to the list of numbers to which you want to forward calls.
9. Click **Save**.
10. Repeat steps 8 -9 to add additional destination numbers.
11. Select a number in the list and click **Edit** to modify the name and/or phone number.
12. Select a number in the list and click **Delete** to remove it from the list.
13. Click **Close**. The *Call Forwarding* screen reappears.
14. Click **Turn On** to enable Call Forwarding.
-OR-
Click **Turn Off** to disable Call Forwarding.
15. Click **Apply Changes**.

Call Waiting

Call Waiting plays a tone if someone calls you while you are on the phone with someone else. You can switch between calls by pressing the hang-up (flash) button on your phone.

1. Click **Call Waiting** on the left.

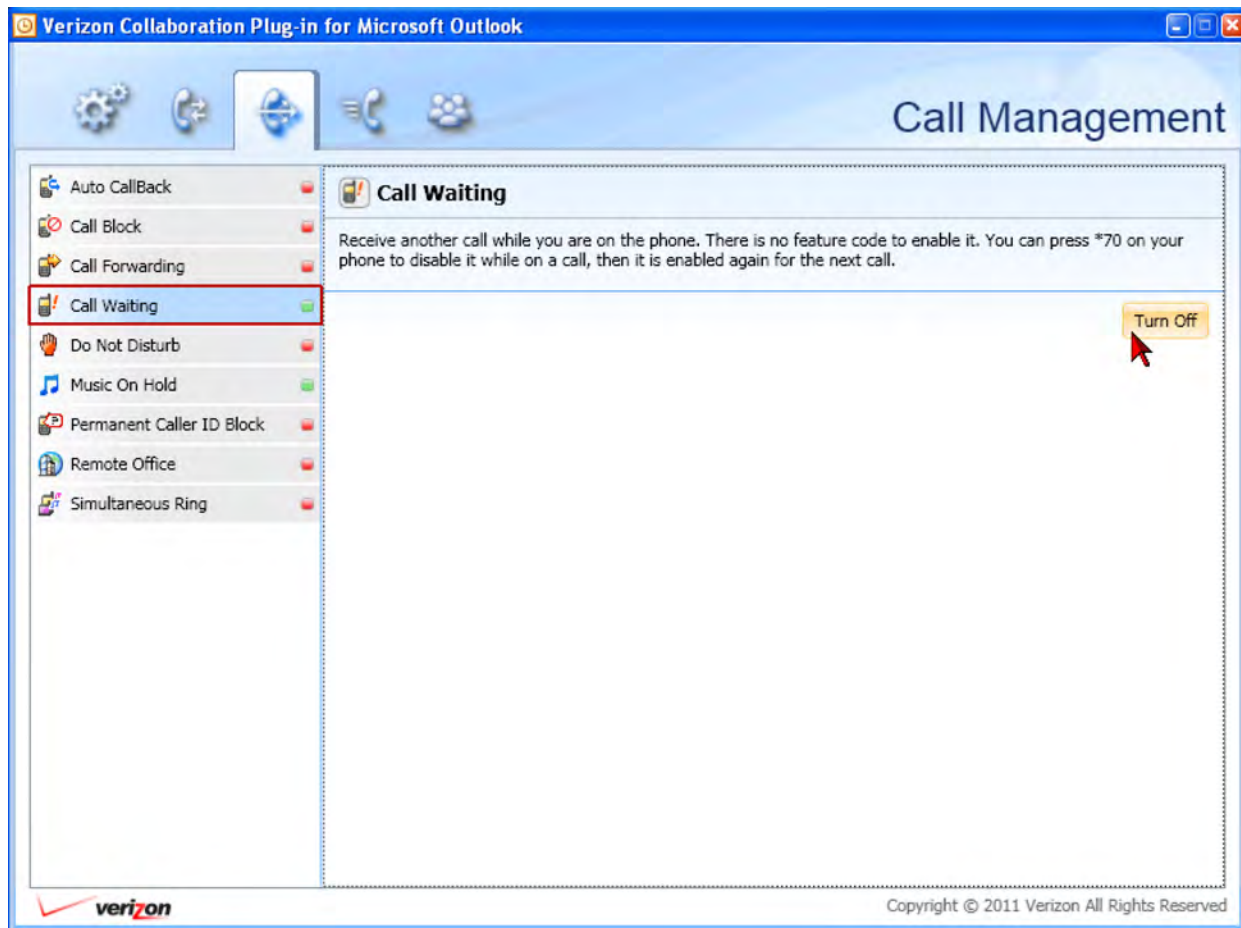


Figure 2-11: Call Waiting

2. Click **Turn On** to enable Call Waiting.
-OR-
Click **Turn Off** to disable Call Waiting.

Do Not Disturb

Do Not Disturb (DND) enables you to send calls directly to your voice mail without ringing to your phone. You can send all calls to voice mail, or just those not entered on your *Allowed Caller List*. Activating the ring reminder makes your office phone emit a short ring burst to inform you when a call is being sent to your voice mail. You can also activate/deactivate by dialing a feature access code.

1. Click **Do Not Disturb** on the left.

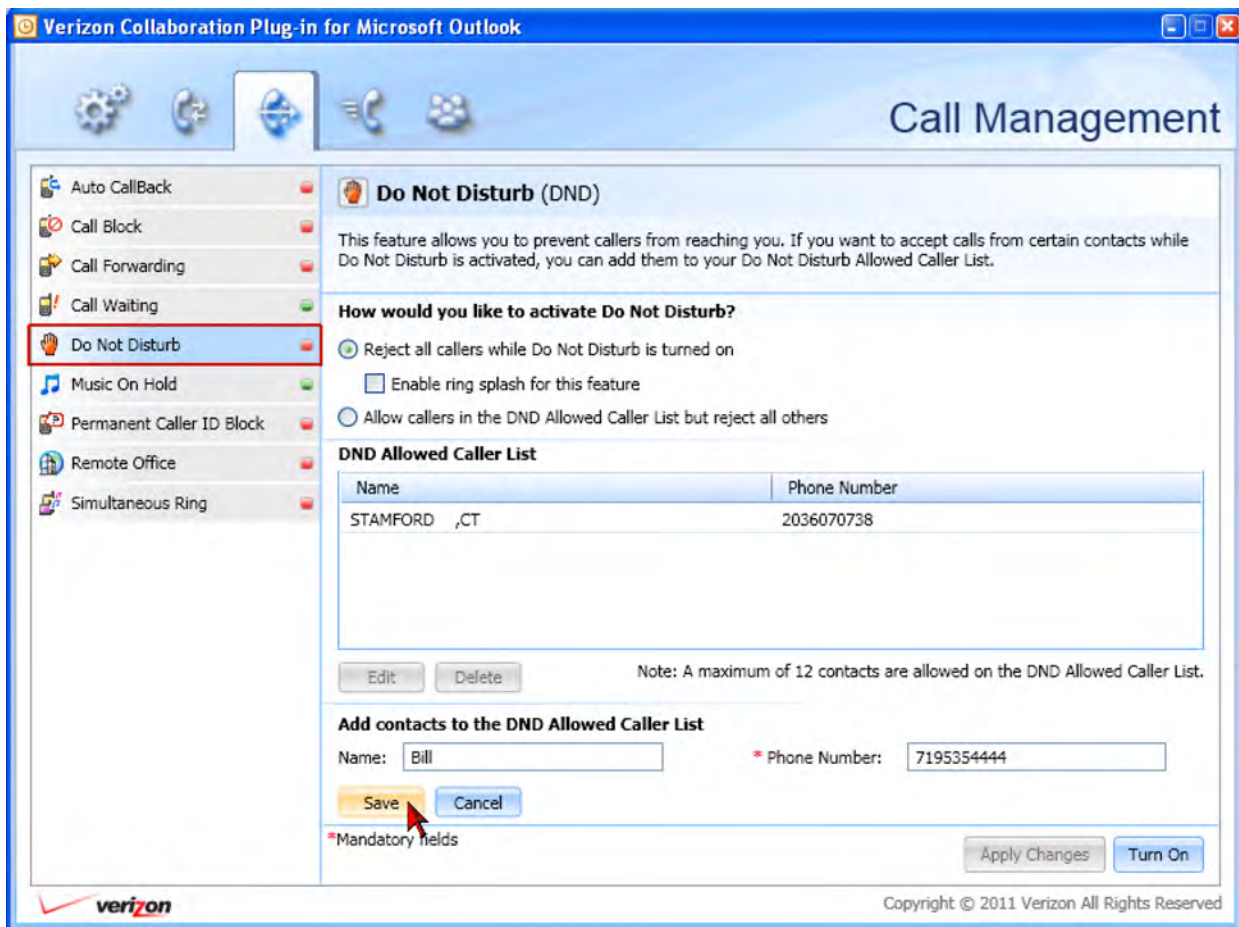


Figure 2-12: Call Management - Do Not Disturb

2. Select **Reject all callers while Do Not Disturb is turned on** if you want all incoming calls to be sent to voice mail.
3. Select **Enable ring splash for this feature** if you want your phone to play a ring reminder when a call is forwarded to voice mail.

-OR-

Select **Allow Callers in the DND Allowed Caller List but reject all others** if you want to create a list of certain callers that can reach you.

4. Enter a *Name* and *Phone Number* to add to the list of allowed callers, if applicable
5. Click **Save**.
6. Repeat steps 4 -5 to add additional numbers.
7. Select a number in the list and click **Edit** to modify the name and/or phone number.
8. Select a number in the list and click **Delete** to remove it from the list.
9. Click **Turn On** to enable Do Not Disturb.
-OR-
Click **Turn Off** to disable Do Not Disturb.
10. Click **Apply Changes**.

Music On Hold

You can enable or disable Music On Hold.

Note: You might not want to enable this feature if your company has many conference calls because hold music will play for all calls placed on hold.

1. Select **Music On Hold** on the left.

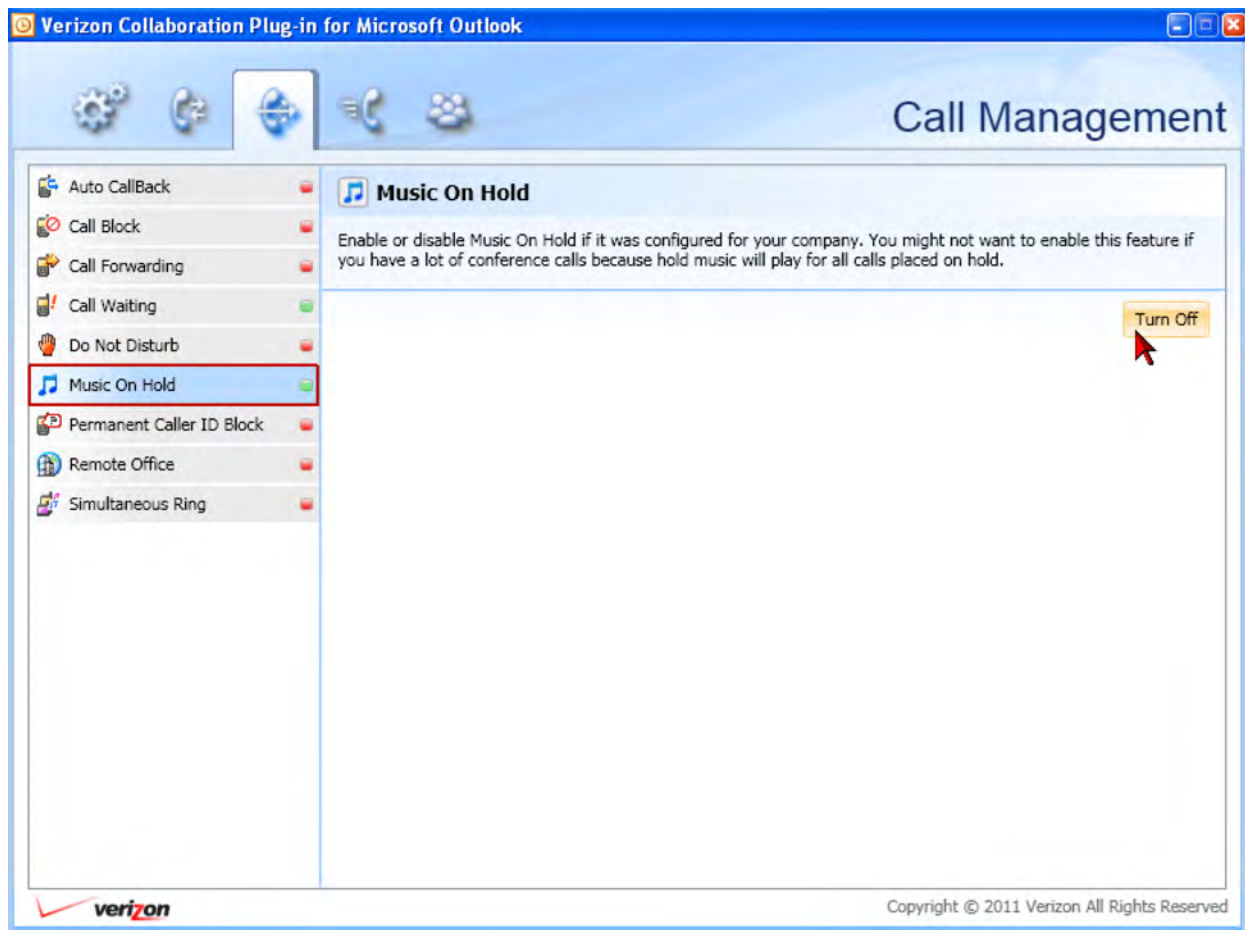


Figure 2-13: Music On Hold

2. Click **Turn On** to enable Music On Hold.
-OR-
Click **Turn Off** to disable Music On Hold.

Permanent Caller ID Block

Permanent Caller ID Block enables you to block your number from displaying on caller ID when making outgoing calls (external only). It is delivered as anonymous or unknown. Subscribers at your location can still see your number when you call them. You have the choice of turning it on or off for all calls and then selectively turning it back on or off using the feature access code.

Permanent Caller ID Block *65

1. Click **Permanent Caller ID Block** on the left.

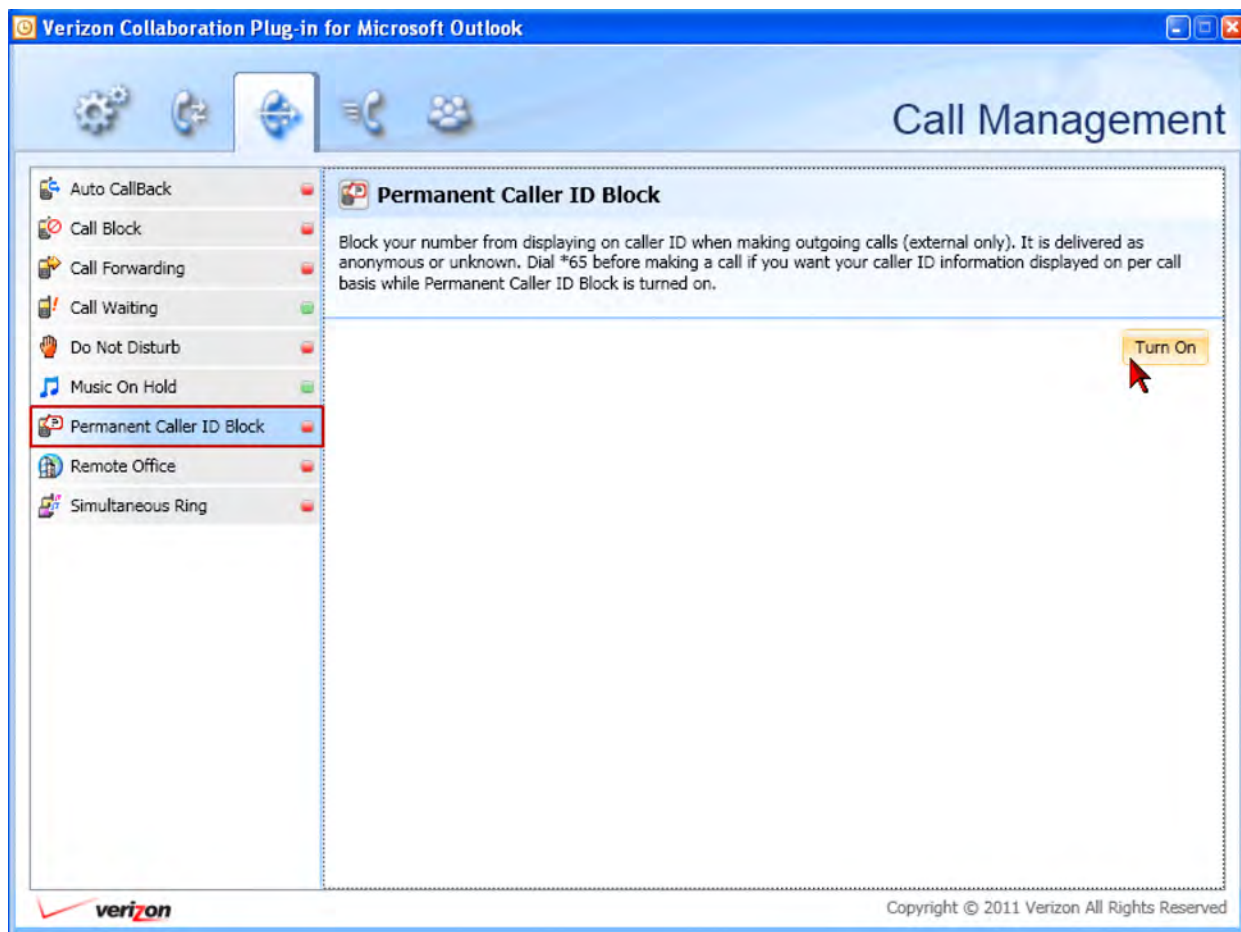


Figure 2-14: Call Management - Permanent Caller ID Block

2. Click **Turn On** to enable Permanent Caller ID Block.
- OR-**
3. Click **Turn Off** to disable Permanent Caller ID Block.

Remote Office

Remote Office enables you to use your home or cell phone as your business phone by directing all incoming calls to ring the remote office phone. If you have Remote Office enabled, your remote location rings, and then you are connected to the caller as if you were placing the call from your office phone.

1. Click **Remote Office** on the left.

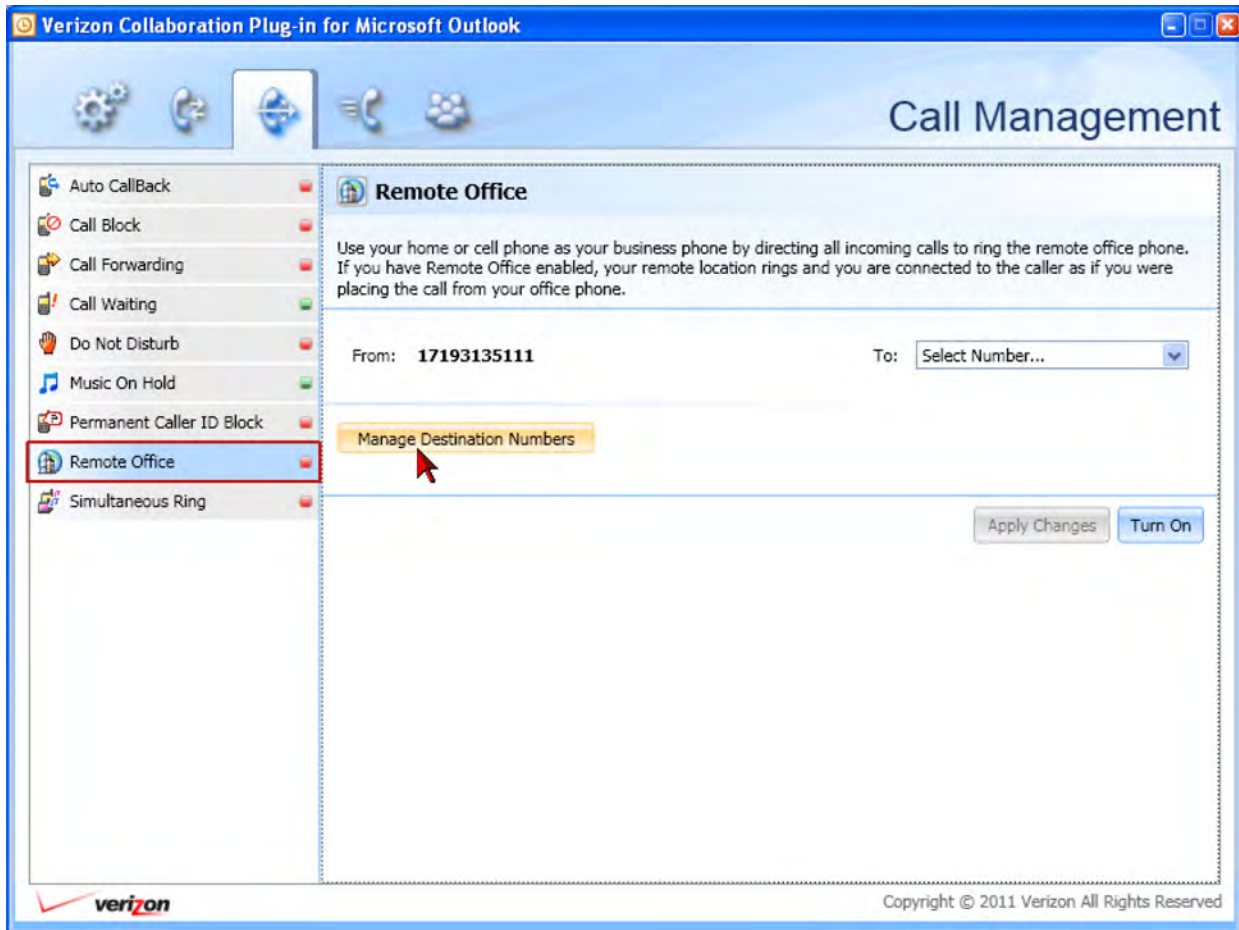


Figure 2-15: Call Management - Remote Office

2. Select the number from the drop-down list to which you want to forward your calls. Numbers can be 10 or 11 digits long. For example, 7195556666, or 17195556666.

Manage Destination Numbers

3. Click **Manage Destination Numbers** to manage your list of contact numbers. The *Manage Destination Numbers* screen appears.

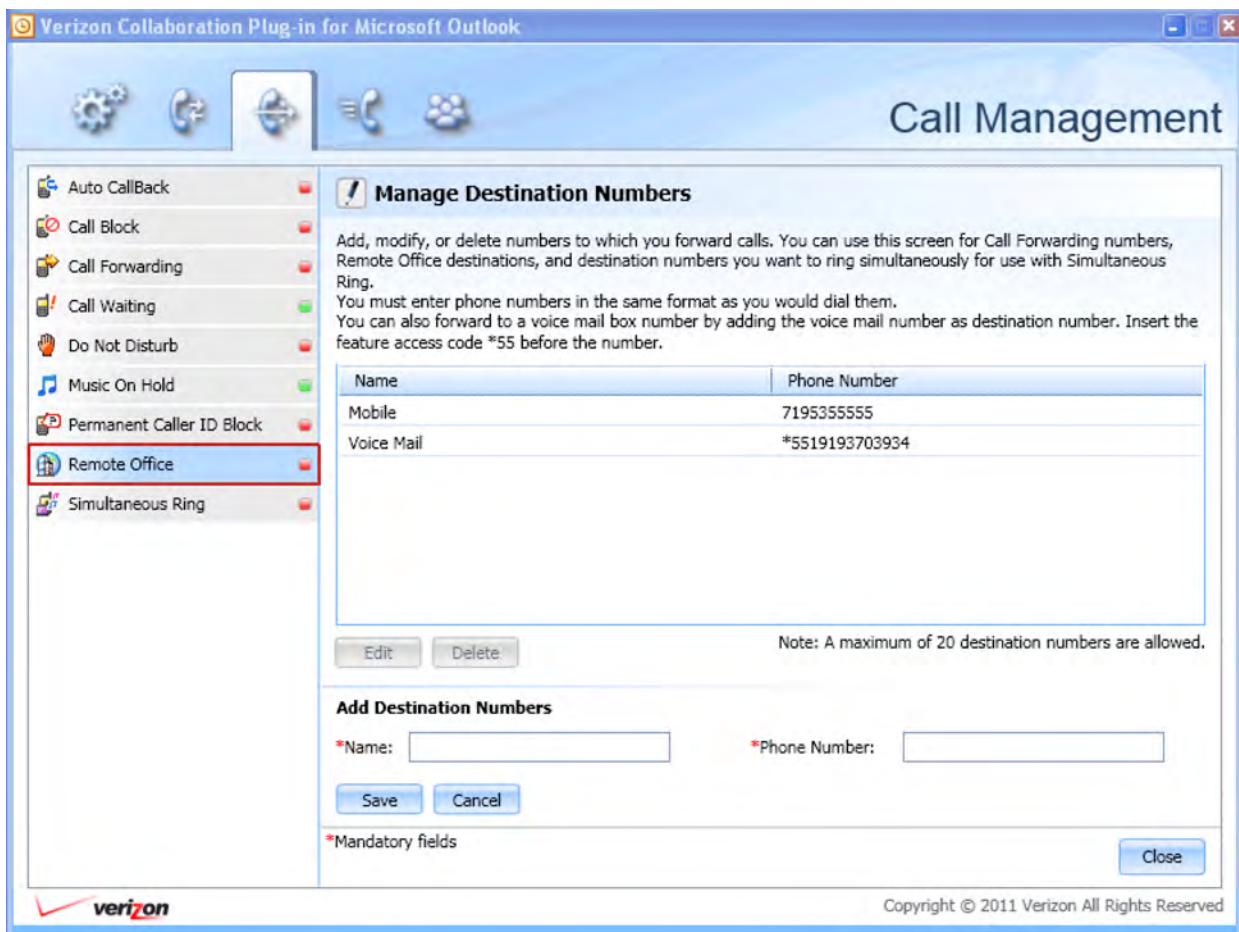


Figure 2-16: Call Management - Manage Destination Numbers

4. Enter a *Name* and *Phone Number* to add to the list of destination numbers.
5. Click **Save**.
6. Repeat steps 4 -5 to add additional destination numbers.
7. Select a number in the list and click **Edit** to modify the name and/or phone number.
8. Select a number in the list and click **Delete** to remove it from the list.
9. Click **Close**. The *Remote Office* screen reappears.
10. Click **Turn On** to enable Remote Office.
- OR-
- Click **Turn Off** to disable Remote Office.
11. Click **Apply Changes**.

Simultaneous Ring

You can create a list of numbers you want to ring simultaneously when someone calls your office phone. This feature is useful if you never want to miss a call. You can also disable Simultaneous Ring when you are at your desk or on a call. If your cell phone or other phone has voice mail that picks up before your office voice mail, your voice mails could be on your cell phone messaging system.

1. Click **Simultaneous Ring** on the left.

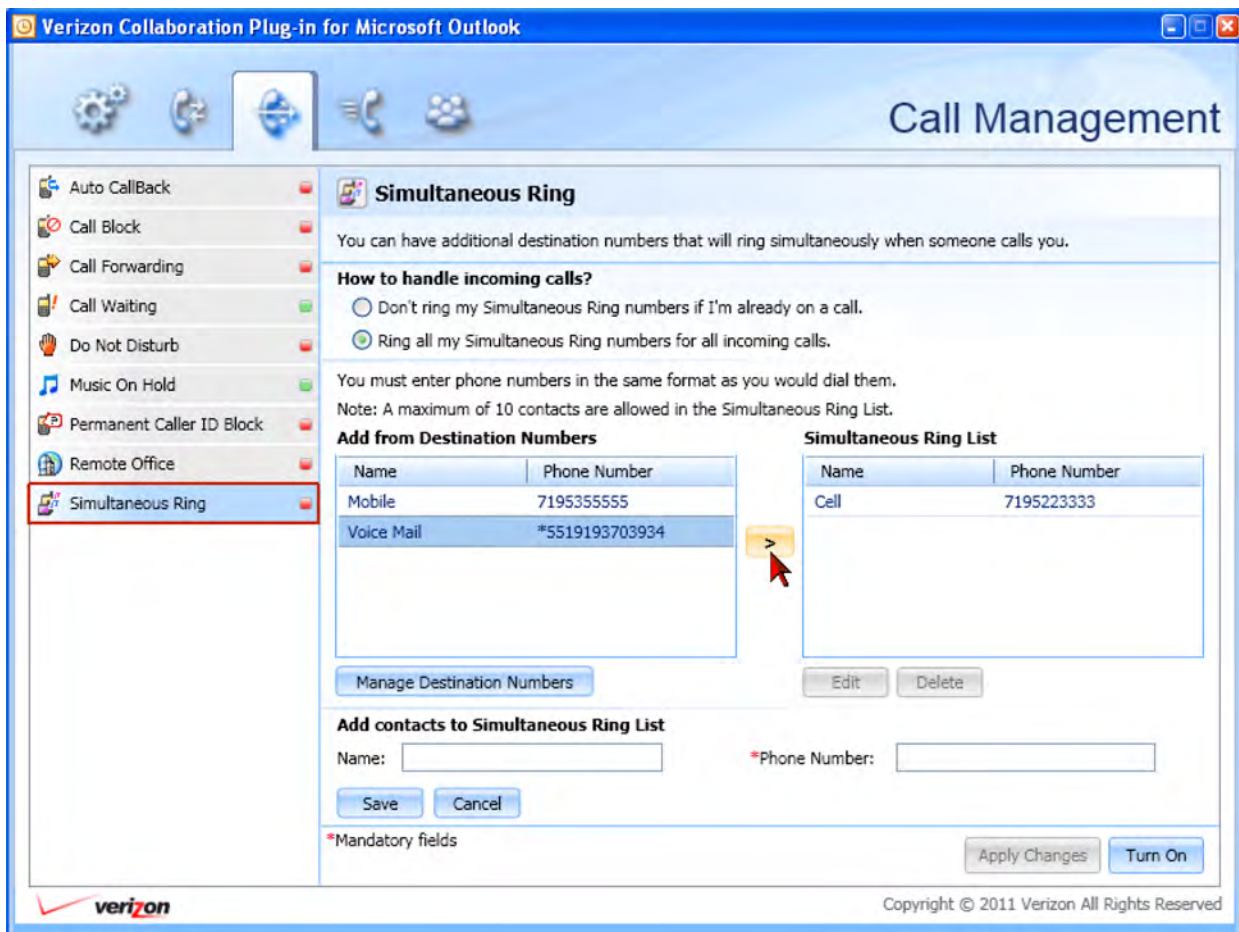


Figure 2-17: Call Management - Simultaneous Ring

2. Select **Don't ring my Simultaneous Ring Numbers if I'm already on a call**, if applicable.
-OR-
Select **Ring all my Simultaneous Ring Numbers for all incoming calls**, if applicable.
3. Enter a *Name* and *Phone Number*.
4. Click **Save** to add it to the *Simultaneous Ring List*.
5. Repeat steps 3 - 4 to add additional numbers.

Manage Destination Numbers

You can add up to 10 numbers that you want to ring simultaneously when you receive a call. The original number displays, not any numbers it hits along the way.

- Click **Manage Destination Numbers** to add the phone numbers you want to ring simultaneously. The *Manage Destination Numbers* screen appears.

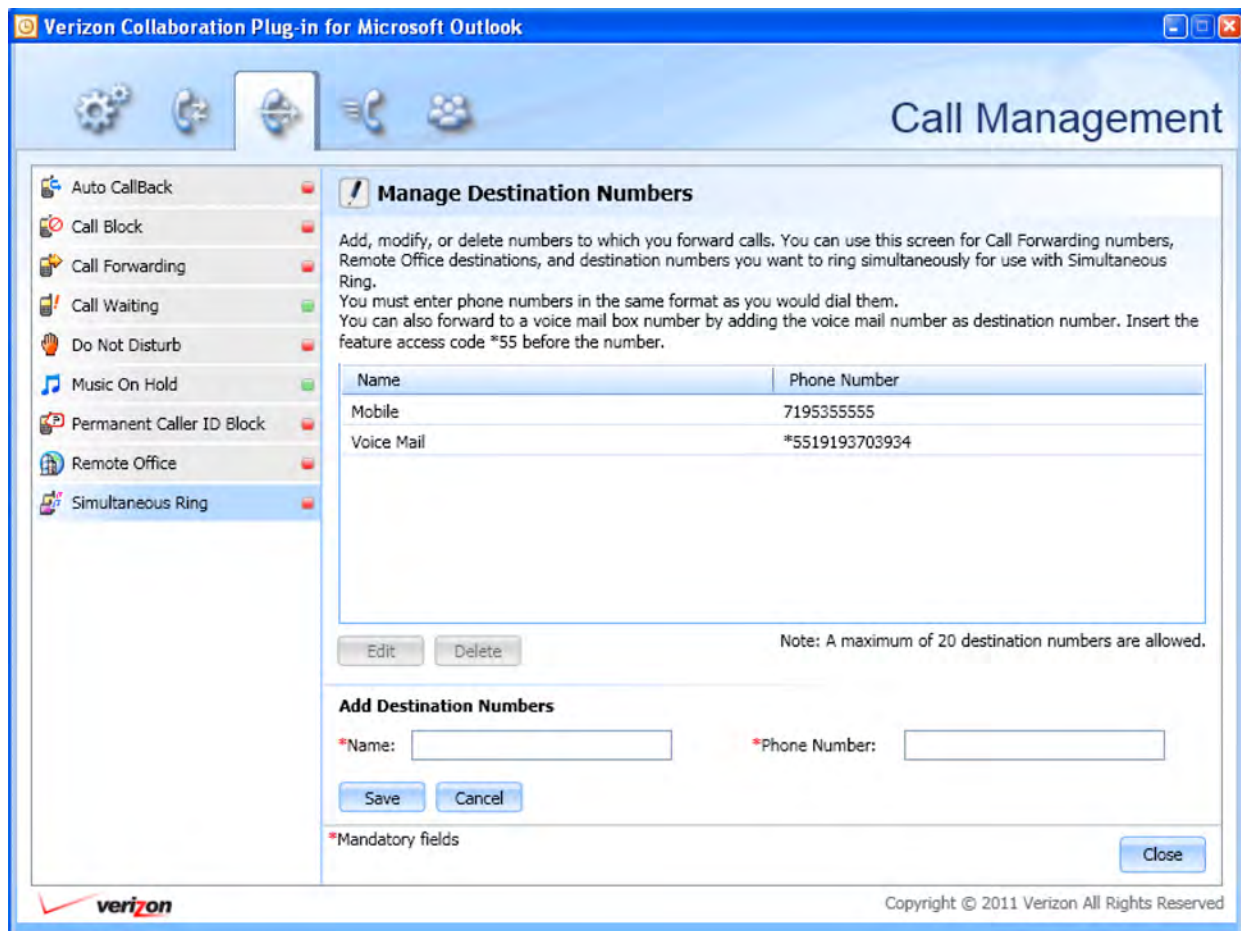


Figure 2-18: Call Management - Manage Destination Numbers

- Type an identifier for the number in the *Name* field.
- Enter the number you want to ring when your office phone rings in the *Phone Number* field.
- Click **Save**.
- Repeat steps 7- 9 to additional numbers.
- Select a number in the list and click **Edit** to modify the name and/or phone number.
- Select a number in the list and click **Delete** to remove it from the list.

Preferences

Note: You can also edit/delete numbers on the *Simultaneous Ring* screen.

13. Click **Close**. The *Simultaneous Ring* screen reappears.

14. Click **Turn On** to enable Simultaneous Ring.

-OR-


Click **Turn Off** to disable Simultaneous Ring.

15. Click **Apply Changes**.

Speed Dial

You can set up to 100 (00 - 99) speed dial codes for your frequently called numbers. The speed dials you create here do not sync with any speed dials you create on your SIP phone. These speed dials are for your softphone only. Refer to the Customer Training and Documentation site at <https://customertraining.verizonbusiness.com> to locate a user guide for your phone.

You can, edit, and delete speed dial numbers, as well as initiate a call.

1. Click the  icon on the toolbar. The *Speed Dial* screen appears.

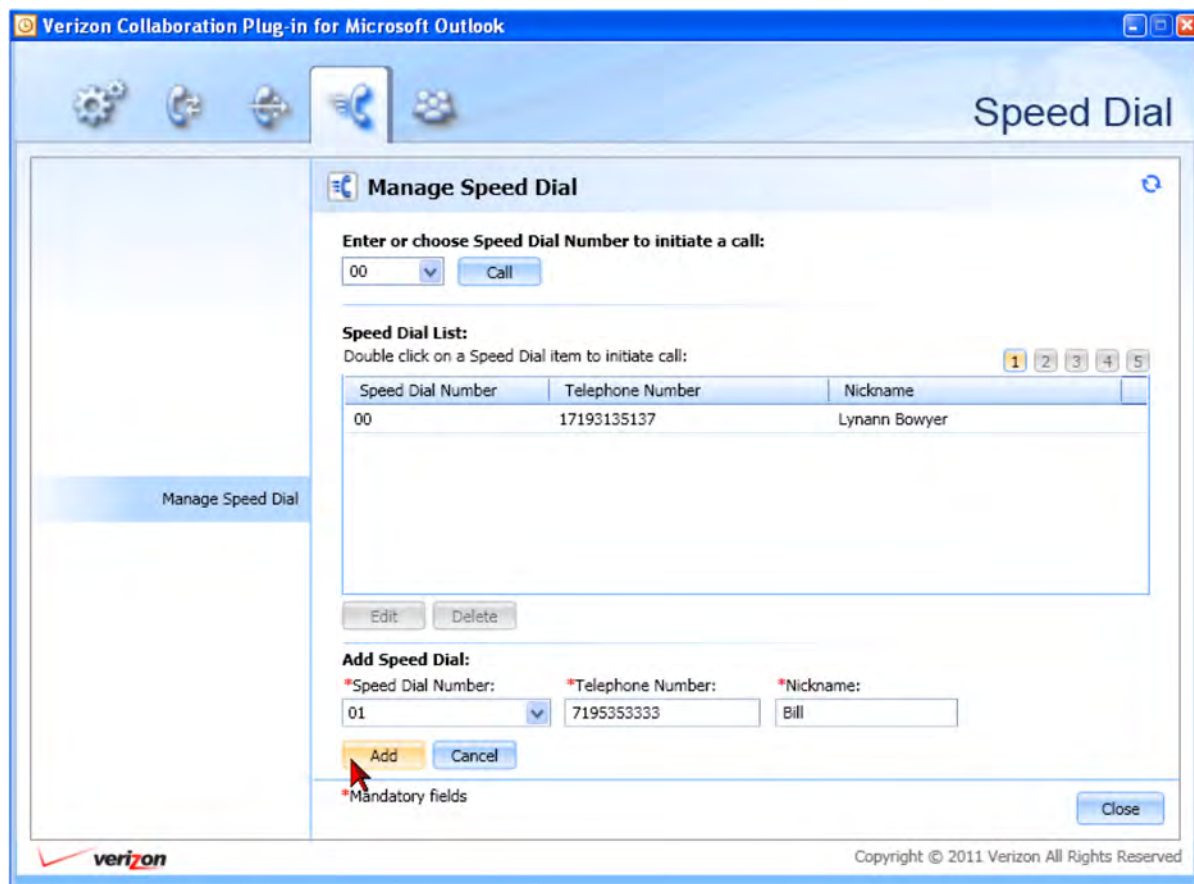


Figure 2-19: Speed Dial

Initiate a Speed Dial Call

2. Select a speed dial number from the drop-down list at the top of the screen.
3. Click **Call**. Your softphone places the call.

-OR-

Double-click on a number in the *Speed Dial* list to initiate a speed dial call from your softphone.

Add/Edit/Delete Speed Dials

Add

1. Select the number you want to assign to the speed dial from the *Speed Dial Number* drop-down list at the bottom of the screen (between 00 and 99).
2. Enter the *Telephone Number* and *Nickname*.
3. Click **Add**. The speed dial is added to the *Speed Dial List*.
4. Repeat steps 1 - 3 to add additional speed dials.

Edit

1. Select a speed dial from the *Speed Dial List*.
2. Click **Edit**. The *Speed Dial Number*, *Telephone Number*, and *Name* appear in the fields at the bottom of the screen.
3. Make the necessary changes.
4. Click **Update**.


Delete

1. Select a speed dial from the *Speed Dial List*.
2. Click **Delete**. A pop-up confirmation appears.
3. Click **OK**. The speed dial is permanently removed.

Conference

Your meetings are displayed on the *Conference - Meetings* screen. You can select one to be your default meeting, start and schedule conferences, and import meetings.

Meetings

1. Click the  tab on the toolbar. The *Meetings* screen appears.

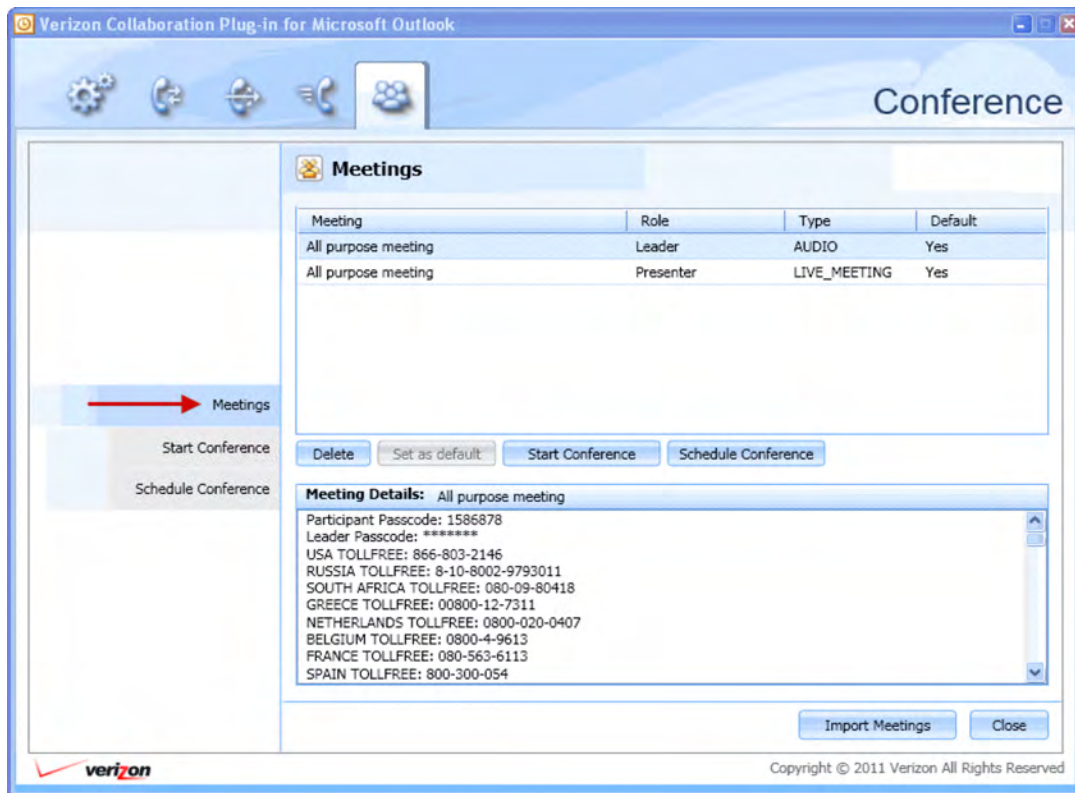


Figure 2-20: Conference - Meetings

2. Select a meeting in the meeting list. You can:
 - Click **Delete** to delete the meeting.
 - Click **Set as Default** to make it your default meeting.
 - Click **Start Conference** to go to the *Start Conference* screen (see page 2-24).
 - Click **Schedule Conference** to go to the *Schedule Conference* screen (see page 2-26).

Note: You can also right-click on a meeting and get the same options listed above.

3. Click **Import Meetings** at the bottom of the screen to import your meetings from the Verizon Conferencing site.

Start Conference

1. Click **Start Conference** on the left of the *Conference* screen. The *Start Conference* screen appears.

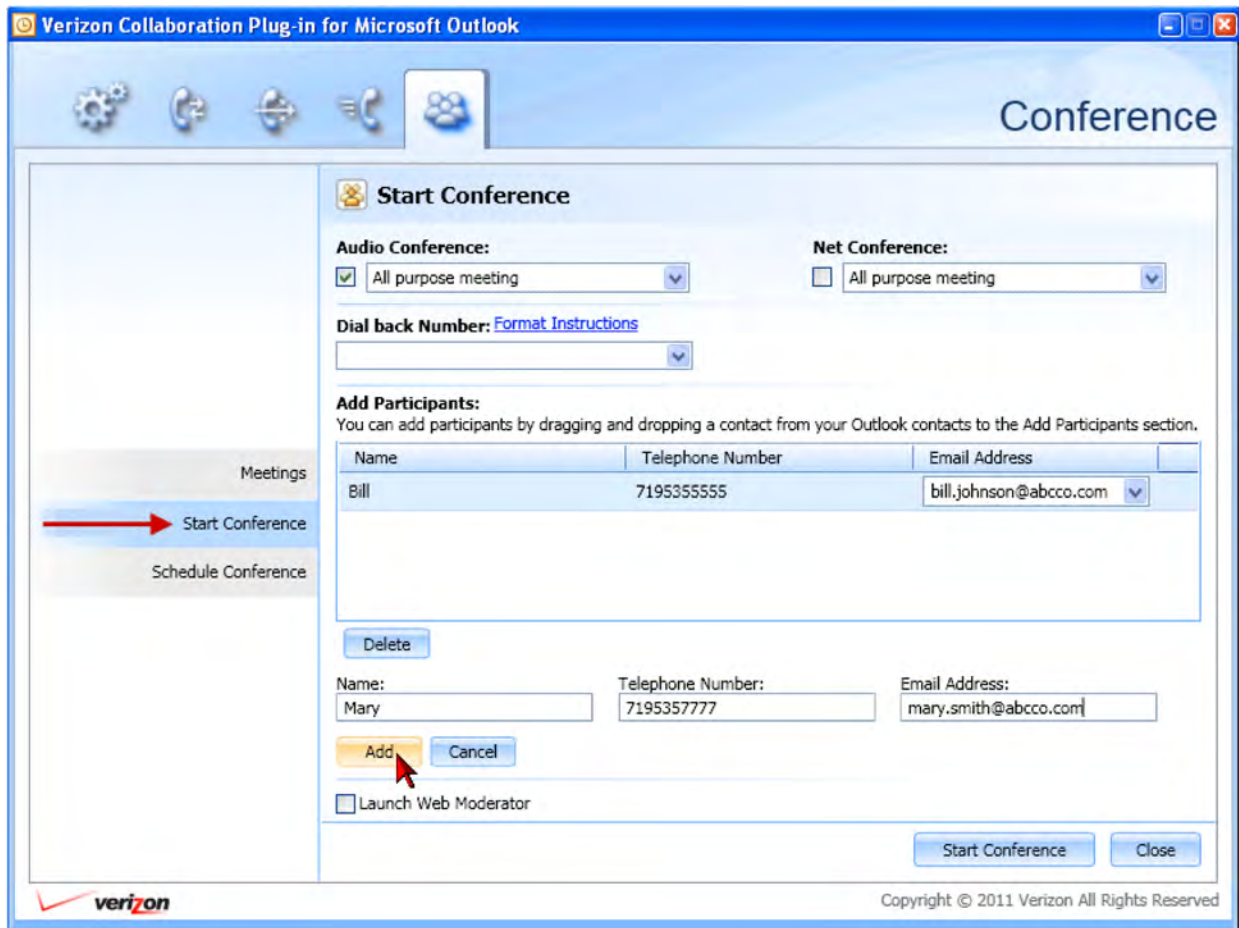


Figure 2-21: Conference - Start Conference

2. Check **Audio Conference** and select the meeting you want to start from the drop-down list.
3. Check **Net Conference** and select the meeting you want to start from the drop-down list, if applicable.
4. Select the *Dial Back Number* from the drop-down list. You can also manually type the number here.
5. Enter the *CRC Value*, if applicable.

Add Participants

1. Enter a *Name*, *Telephone Number*, and *Email Address* in the fields at the bottom of the screen.
2. Click **Add**. The participant is added the *Add Participants* list.

3. Check **Launch Web Moderator**, if applicable. Refer to the online help in the Web Moderator for instructions on using this tool.
4. Repeat steps 1 -2 to add additional participants manually.

-OR-

Open your Microsoft Outlook Contacts.

Drag-and-drop participants to the *Add Participants* list.

Note: Select a participant and click **Delete** to remove them.

5. Click **Start Conference** to begin your conference. Dial back numbers that were added on the *Conference Settings* screen will receive a call to join them to the audio conference (see page 2-4).

Schedule Conference

1. Click **Schedule Conference** on the left of the *Conference* screen. The *Schedule Conference* screen appears.
2. Check **Audio Conference** and select the meeting you want to start from the drop-down list.
3. Check **Net Conference** and select the meeting you want to start from the drop-down list, if applicable.

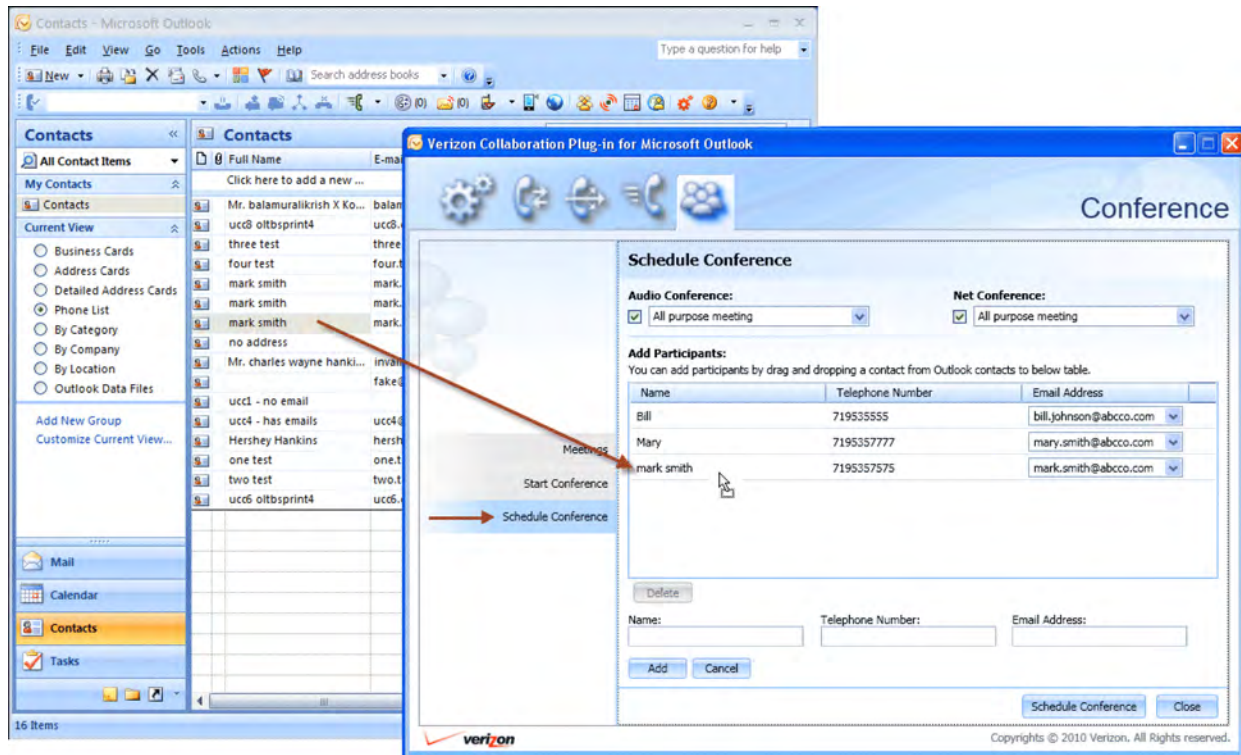


Figure 2-22: Conference - Schedule Conference

Add Participants

4. Open your Microsoft Outlook Contacts.
5. Drag-and-drop participants to the *Add Participants* list.

-OR-

Enter a *Name*, *Telephone Number*, and *Email Address* in the fields at the bottom of the screen.

Click **Add**. The participant is added the *Add Participants* list.

Repeat to add additional contacts.

Note: Select a participant and click **Delete** to remove them.

- Click **Schedule Conference**. An invitation opens in a new Microsoft Outlook email message.

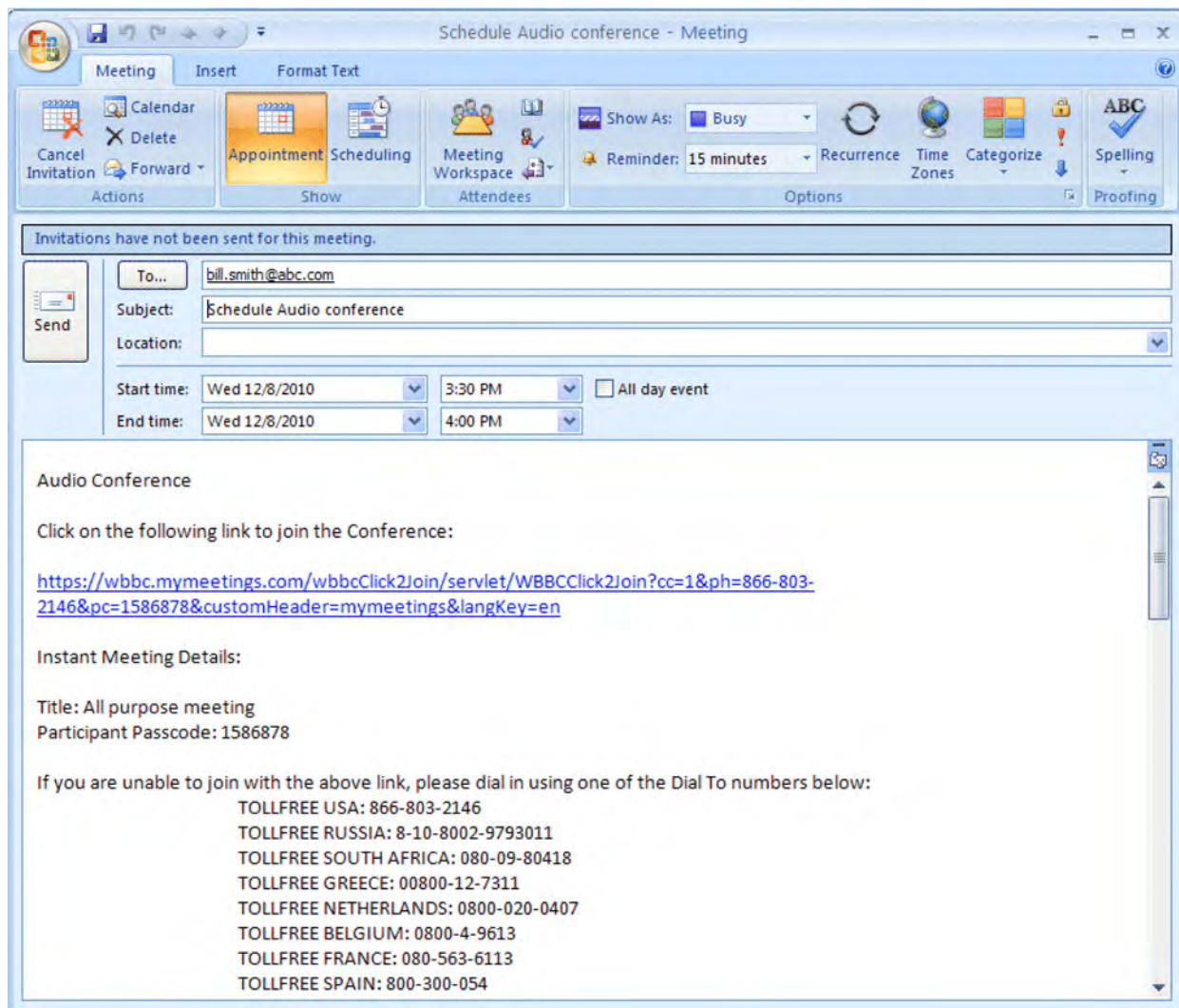


Figure 2-23: Schedule Audio Conference

- Make any necessary edits to the message.
- Click **Send**.








USE THE TOOLBAR

3







The Microsoft Outlook toolbar combines access to your ICP features and the ability to manage and use your Conferencing features.




Icons

| Icon | Description |
|---|---|
|  | You will never see grayed out icons unless you log out of all services. You can click the log in/log out button to log back in. <ul style="list-style-type: none">• if you are conferencing only, you will not see telephony icons.• if you do not have a conferencing account and only use the telephony features, you will not see conferencing icons. |
|  | Open the <i>Speed Dial</i> in the <i>Preferences</i> window. Click the arrow to select the speed dial number you want to call. |
|  | Open the <i>Call Logs</i> in the <i>Preferences</i> window. |
|  | Open the <i>Voice Mails</i> screen in the <i>Call Logs</i> window. |
|  | Open your <i>Call Management</i> preferences. Click the arrow to select a call management option from a drop-down menu. That option opens in the <i>Call Management</i> preferences. |
|  | Launch the softphone. |
|  | Launch ICP Web. |

Use the Toolbar

| Icon | Description |
|---|--|
| Text box | Type or paste the phone number you want to call and press Enter . Your softphone calls the number and the notification pop-up appears on your desktop. You can click the ignore/end icon on the pop-up to cancel the call. <u>Note</u> : You must be signed in to your softphone. If you are not, the call will be placed when you sign in. |
|  | Open your <i>Start Conference</i> screen in the <i>Preferences</i> window. Click the arrow to select Start Default Net Conference , Start Default Audio Conference , or Start Default Audio and Net . Refer to pages 3-3 to 3-7 below for instructions. |
|  | Open your <i>Schedule Conference</i> screen in the <i>Preferences</i> window. |
|  | Launch the Web Moderator in another browser window. The Web Moderator allows you to see the people in your conference. You can assign names to you numbers, mute all lines, and check for noise on a line. Refer to the Web Moderator help for detailed instructions. |
|  | Open your <i>Meetings</i> screen in the <i>Preferences</i> window. |
|  | Open the <i>Preferences</i> window. |
|  | Click the help icon to open help in another browser window. Click the arrow to select Help Topics , Support , Privacy Policy , Terms of Service , Send Feedback , and About to view your current version and check for upgrades. |

Start Default Net Conference

You can start a net conference instantly by selecting **Start Default Net Conference** from the drop-down arrow next to the  icon on the toolbar.

A pop-up appears asking you to wait while your conference is started.

Click **OK**.

An invitation email opens.

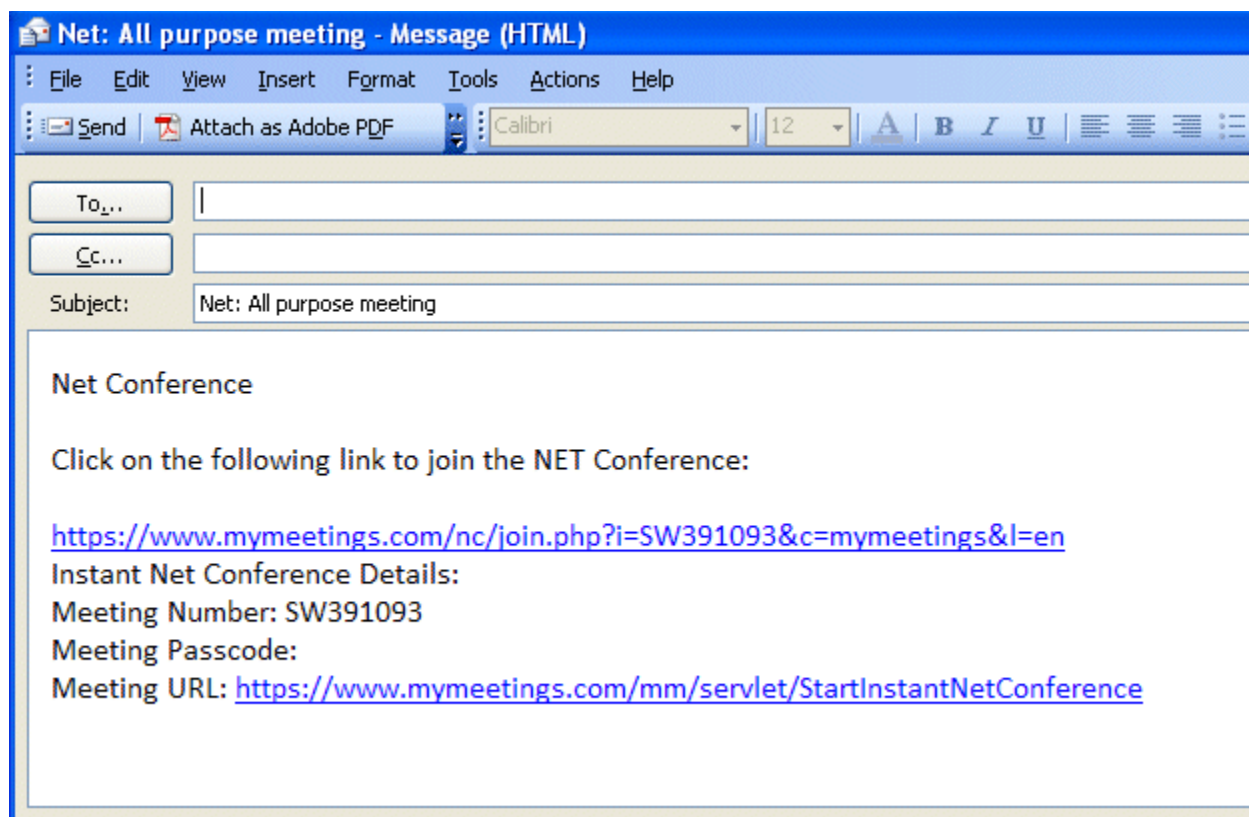
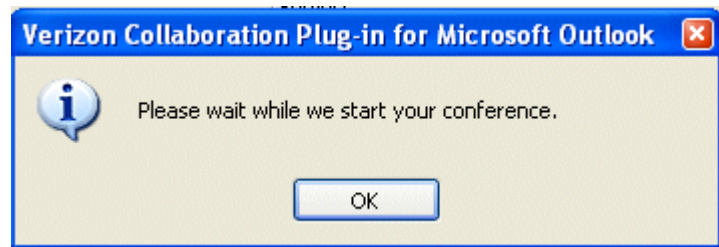



Figure 3-1: Invitation Email

Select who you want to invite to your instant meeting. They will receive an email invitation with the meeting details. Your meeting window opens and you can begin your conference.

Start Default Audio Conference

You can start an audio conference instantly by selecting **Start Default Audio Conference** from the drop-down arrow next to the  icon on the toolbar.

A pop-up appears asking you to wait while your conference is started.

Click **OK**.

The *Start Conference* screen appears.

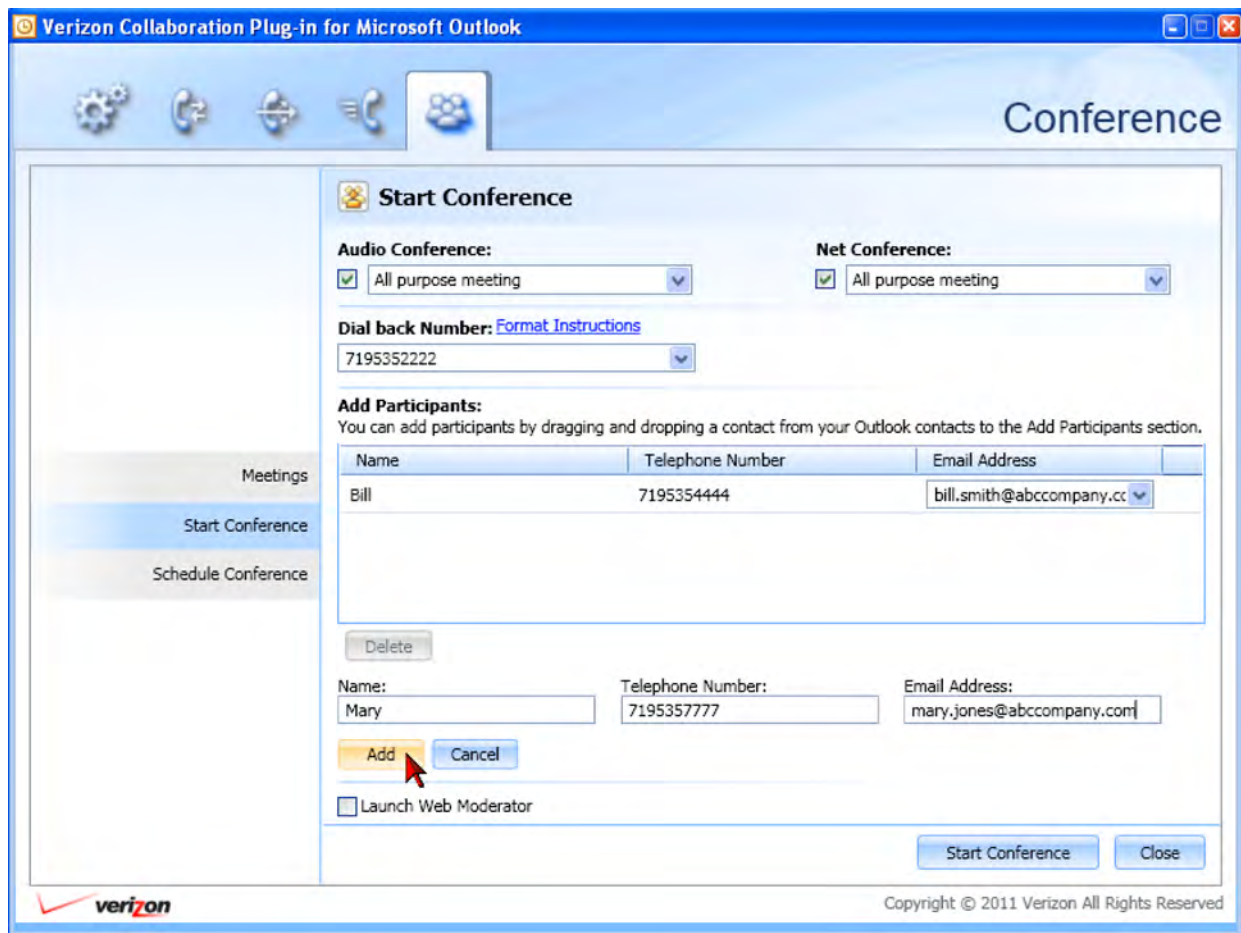
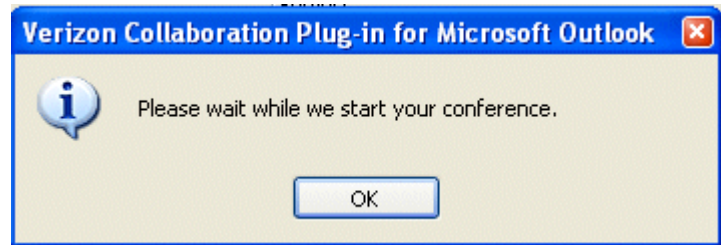



Figure 3-2: Start Conference

1. Select the audio conference you want from the *Audio Conference* drop-down list, if applicable.

2. Select your *Dial Back Number* or enter it.
3. Add participants.
4. Click **Start Conference**. The dial out is initiated and an email invitation opens with the email addresses populated of the people you added on the *Start Conference* screen. You can add additional participants or edit the invitation email before you send it.

Start Default Audio and Net Conference

You can start an audio and net conference instantly by selecting **Start Default Audio and Net** from the drop-down arrow next to the  icon on the toolbar.

A pop-up appears asking you to wait while your conference is started.

Click **OK**.

The *Start Conference* screen appears.

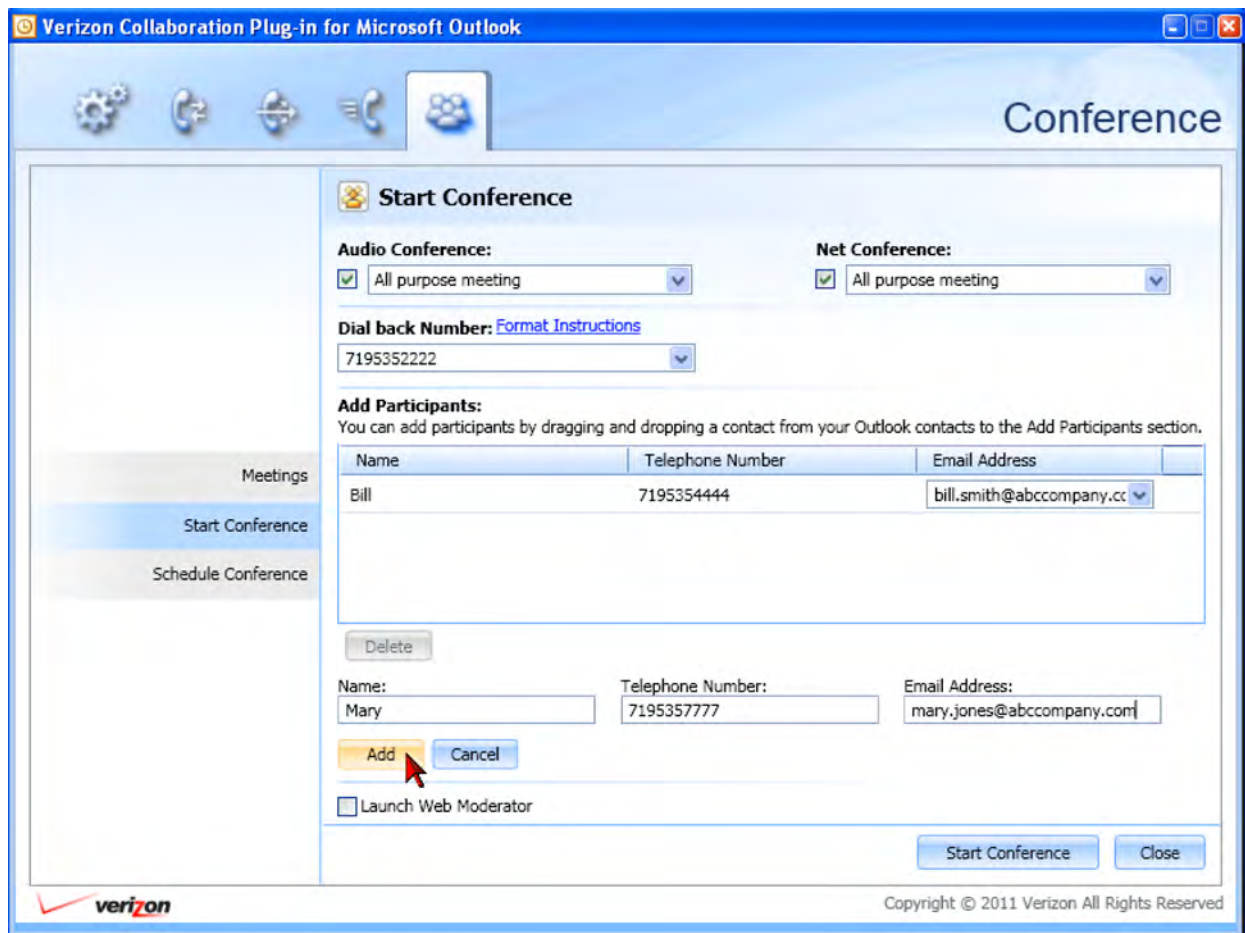
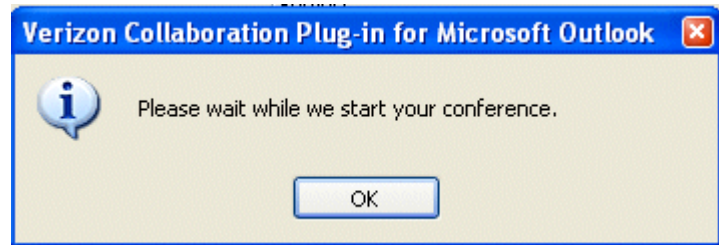


Figure 3-3: Start Conference


1. Select the audio conference you want from the *Audio Conference* drop-down list, if applicable.

2. Select the net conference you want from the *Net Conference* drop-down list, if applicable.
3. Select your *Dial Back Number* or enter it.
4. Add participants.
5. Click **Start Conference**. The dial out is initiated and an email invitation opens with the email addresses populated of the people you added on the *Start Conference* screen. You can add additional participants or edit the invitation email before you send it. The net portion is initiated.

The softphone is installed with the toolbar. When you answer a call, whether on your hard phone or softphone, it appears in the softphone. The softphone is also used as a session controller for your hardphone calls. Select the default device to answer incoming calls (hard phone or softphone) on the *Telephony Settings* screen in the *Preferences* window (see page 2-6).

Handle Incoming Calls

When you receive an incoming call, a notification pop-up appears on your desktop. You can answer the call on your hard phone or softphone.

Important: If your default device is your softphone, you must launch it to be able to answer calls. Click  on your softphone to acknowledge the 911 address requirements and launch the softphone. Refer the Softphone User Guide for instructions on using the softphone features.

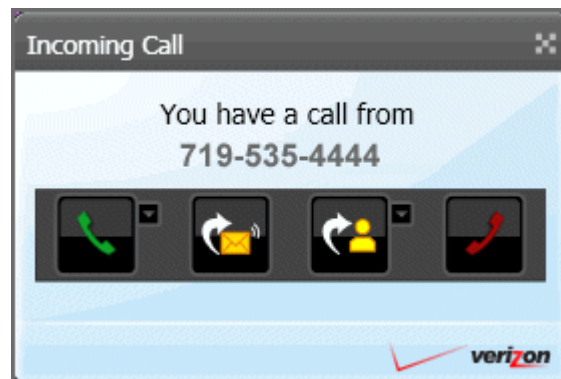





Figure 4-1: Incoming Call

Click  to **answer** the call. Click the arrow to change the device you want to use to answer the call.

Click  to **forward to voice mail**. The call is sent to your voice mail.

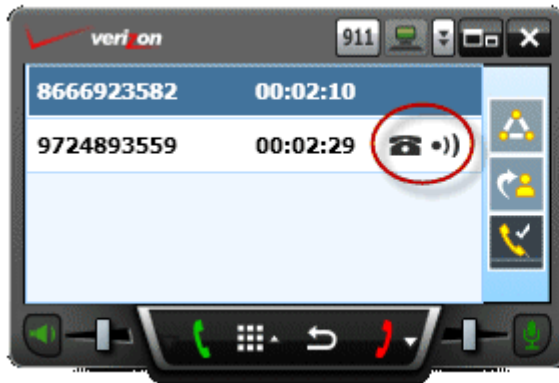
Click  to **forward to another telephone number**. Click the arrow to select a destination number. Refer to section 2 for instructions on adding destination numbers.

Click  to **ignore** the call. The call is sent to your voice mail.

Softphone Call

Below is an example of a softphone call that is selected and on hold (☎️).

The 📞 icon indicates an active call.



Softphone call selected and on hold (no active talk icon).

Click 📞 to place the call on hold.

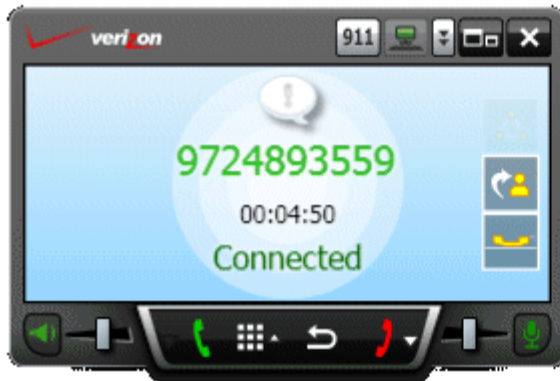
Click 📞 to resume the held call.

Click 🔄 to transfer the call to another telephone number.


Click 🔄 to initiate a 3-way call.


Hard Phone Call


Below is an example of a single active hard phone call. Since the softphone is acting as a session controller, you can put the hard phone call on hold or transfer it to another number.



Single active hard phone call.

Click  to place the call on hold.

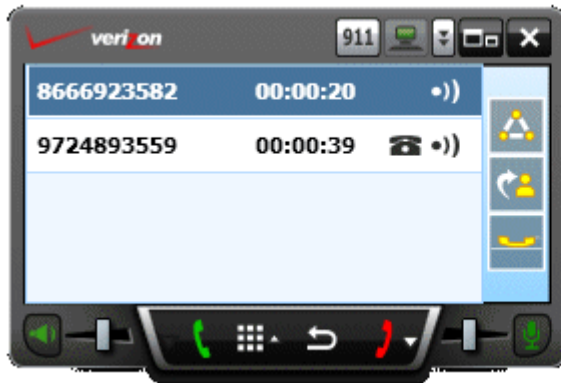
Click  to resume the held call.

Click  to transfer the call to another telephone number.


Note: The 3-way call option () is only for softphone calls.


Softphone and Hard Phone Call


Below is an example of an active softphone call and an active hard phone call. Both calls are active (•)) and the hard phone call is on hold (📞).




One active softphone call and one active hard phone call.

Click  to place the call on hold.

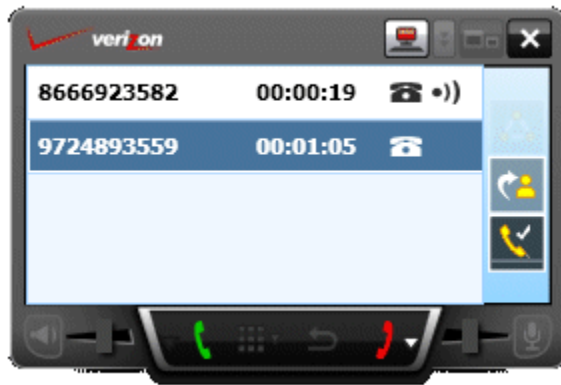
Click  to resume the held call.

Click  to transfer the call to another telephone number.


Note: The 3-way call option () is only available when the softphone call is selected.


Two Hard Phone Calls


Below is an example of two hard phone calls. The top call is active (•)) and both calls are on hold (📞).



Two hard phone calls.
Top call is active.
Both calls are on hold.

Click  to place the call on hold.

Click  to resume the held call.

Click  to transfer the call to another telephone number.

Note: The 3-way call option () is only for softphone calls.

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