

# Verizon Conferencing e-Scheduling Tools Installation Guide

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## **Step-by-Step Installation**

1. It is strongly recommended that you close all applications before proceeding. Click **OK**.

2	Welcome	, a se de la company de la La company de la company de	×
Welcome to the Setup program for the e-Scheduling Tools Plug-In.			
	Setup cannot install system files or update shared files if they are in use. It is strongly recommended that you close all applications before proceeding.		
-			_
		OK E <u>x</u> it Setup	

2. Click the **button on the left side of the screen** if the directory is okay. Otherwise click on **Change Directory** and select where you want the software saved.

🛃 e-Scheduling Tools Setup	X
Click this button to install the e-Scheduling Too destination directory.	ols software to the specified
Directory: C:\Program Files\eSchedulingTools-2\	Change Directory
E <u>x</u> it Setup	

- 3. The wizard will walk you through the steps to set up the **Conference Contact and Leader profiles**. You will need to know your:
- Verizon Conferencing Online Login Name
- Password
- Authorization Code
- CRC or Billing Code

**Note:** You should have an e-mail containing an Online Login Name and Password, which are case-sensitive.

Conference Contact / Conf	erence Leader Setup
Contraction of the second seco	This wizard will walk you through the steps of creating your Conference Leader and Conference Contact profiles. Please ensure that all applications are closed before continuing with the installation. In order to proceed you will need to know your Online Login Name and Password, your company's Authorization code (obtainable through your company's billing point of contact), and your Customer Reference Code (CRC) or Billing Code.
For technical support, please call 1-800-857-8777, Option 1	Cancel < Back Next >

- 4. At the next screen, enter:
- Conference leader's full name
- Phone number (You can put in the separators.)
- Time zone

🛃 Conference Leader Profile Setup 🛛 🔀			
232 Barriel de	The Conference Leader is the person hosting a conference call. Please note: The Conference Leader and the Conference Contact are often the same person. Enter the Conference Leader's full name: Linda Almond		
	Enter the Conference Leader's phone number, including area code:           555-555-5555		
<ul> <li>indicates required field</li> </ul>	Select the Conference Leader's time zone:		
For technical support, please call 1-800-857-8777, Option 1	Cancel < <u>B</u> ack <u>N</u> ext >		

- 5. Enter the Conference Leader's:
- Verizon Conferencing Online Login Name
- Authorization Code
- Billing Code

🛃 Conference Leader Profile Setup		
	Enter the Conference Leader's Online Login Name: almond  Enter the Conference Leader's Authorization code:  5155555V  Enter the Leader's Customer Reference Code (CRC) or Billing Code:  12345678	
* indicates required field		
For technical support, please call 1-800-857-8777, Option 1	Cancel < <u>B</u> ack <u>N</u> ext >	

6. If the Leader and the Contact are the same person, then click on **Copy Leader to Contact** button. Type in the Contact's phone number.

Click Next.		
📳 Conference Contact Profile 3	Setup	X
	The Conference Contact is the person responsible for setting up conference calls for a Conference Leader. Please note: Conference Contact and Conference Leader may be the same person. Enter the Conference Contact's phone number, including area code: Copy Leader to Contact 555-555-5555 * Enter the Conference Contact's e-mail address: LindaAlmond@e-mail.com	
* indicates required field		
For technical support, please call 1-800-857-8777, Option 1	Cancel < <u>B</u> ack <u>N</u> ext >	

- 7. Enter your:
- Verizon Conferencing Online Login Name
- Password

**Note:** Upon Creating Your Profile in step #1 above, you should have received an e-mail containing your Online Login Name and Password, which are case-sensitive. If you already have a profile because you have used the website in the past to schedule calls, then you can use that one.

🚭 Conference Contact Profile Setup		
	Enter the Conference Contact's Online Login Name: almond • Enter the Conference Contact's Password: **	
* indicates required field		
For technical support, please call 1-800-857-8777, Option 1	Cancel < <u>B</u> ack <u>N</u> ext >	

8. If you want the **Net Conference** preference, skip to step #10 in this document.

If you do not select Net Conference, the Net Conference options below it will be grayed out.

Click Next to move on to select the total number of lines needed for your calls.

🔂 Conference Call Preferences Setup		
San Carlos de	The following preferences can be changed at the time of reservation: Net Conference Enter Net Leader Passcode: Linda Enter number of Net Conference participants: Select features you would like to use for your Net Conferences:	
	Features         Net Participant List         Operator Hosted         SSL Encryption         Recording         Net Replay Duration         FTP Download	
For technical support, please call 1-800-857-8777, Option 1	Cancel < <u>B</u> ack <u>N</u> ext >	

9. If you have not selected the Net Conference check box, you can select a maximum number of 20 lines for your calls, which will be **audio-only**.

Click Next.
🔁 Conference Call Preferences Setup
The following preferences can be changed at the time of reservation: Enter the total number of lines requested (including leader) for each call: 21 (max lines = 20) e.Schaduling Tools Setur
e-Scheduling Tools Setup X uid like to use for your
Total lines must be 20 or less. 8, etc.)
Of your total lines (see above) how many participants will be using a toll number?
For technical support, please call 1-800-857-8777, Option 1 Cancel < <u>B</u> ack <u>N</u> ext >

 If you want the Net Conference preference, click the Net Conference check box. Enter the desired Net Leader Passcode. Enter the number of Net Conference participants – up to 100. Select the desired features and recording options.

Note: The line number, features, and recording options may be changed later and with each call you set up.

🔀 Conference Call Preference	es Setup	×
	The following preferences can be changed at the time of reservation: Net Conference Enter Net Leader Passcode: Linda Enter number of Net Conference participants: 25 Select features you would like to use for your Net Conferences:	
	Features         ✓ Net Participant List         Operator Hosted         SSL Encryption         Recording         Net Replay Duration         FTP Download	
For technical support, please c 1-800-857-8777, Option 1	allCancel< <u>B</u> ackNext>	

11. If you selected the Net Conferencing check box above, you can set your **Net Conference** preferences. You can select up to 100 lines. Then, select the desired access types.

Note: The line number and the access types may be changed later and with each call you setup.

🖟 Conference Call Preferences Setup		
2 <sup>324</sup> 600	The following preferences can be changed at the time of reservation: Enter the total number of lines requested (including leader) for each call: 25 (max lines = 100) Select the access types you would like to use for your conferences:	
)	✓ Toll Free (e.g. 800, 877, 888, etc.)	
	✓ Internal Dialing Plan	
	🔽 Toll (e.g. 312, 773, 212, etc.)	
	Of your total lines (see above) how many participants will be using a toll number? 2	
For technical support, please call 1-800-857-8777, Option 1	Cancel < <u>B</u> ack <u>N</u> ext >	

12. Do you have Microsoft Outlook security patches installed? If so, skip this step.

Otherwise, this step is very important.



You must enable the **Macros** three times as the pop-up appears.

Warning: Opening "Untitled"	
The form for this item has not been registered in this folder or in your company's forms library. Because this item contains macros, which could contain a virus harmful to your computer, you may not want to run the macros.	
If you are sure this item is from a trusted source, click 'Enable macros'. Otherwise, click 'Disable macros'.	
Disable Macros Enable Macros	

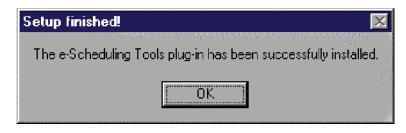
13. If you have the Microsoft Outlook security patches already installed in your Outlook, you will not have to enable Macros.

Instead, you will see this screen. Please check the box and select 10 minutes from the pull-down menu.

**Note:** You may see this message again when you are scheduling a call. If you do, please select 5 minutes or more from the pull-down menu.

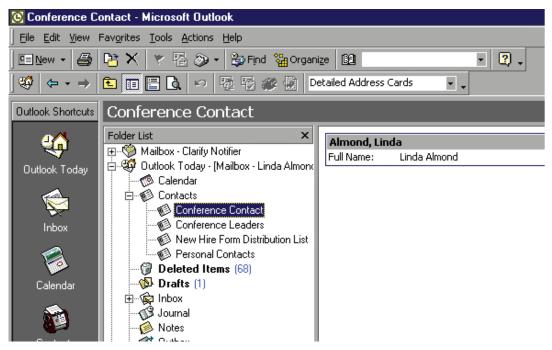


14. The installation is complete! You will be prompted to shut down your computer. The Read Me file will appear, which you can print for future reference.



#### Changes in Your Outlook®

Two new subfolders will be created in your Contacts folder.

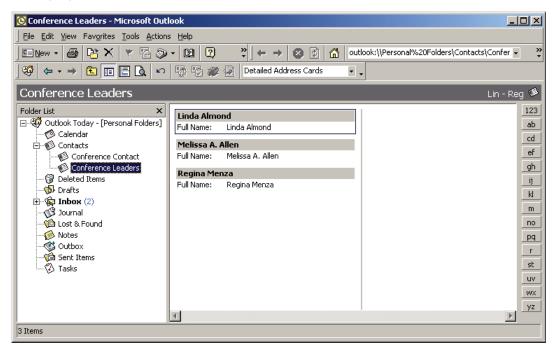


e-Scheduling Tools requires the current view to be set to **Detailed Address Cards** for the Conference Contact and Conference Leader. To do this:

- 1. Make sure the Folder List is displayed by selecting View from the menu bar and selecting Folder List.
- 2. Expand your **Contacts** folder by clicking on the + sign to its left or by double-clicking the **Contacts** folder.
- 3. Highlight the **Conference Contact** folder within the **Contacts** folder by clicking on it once.
- 4. Select View in the menu bar.
- 5. Select **Current View** from the menu.
- 6. Select Detailed Address Cards.
- 7. Highlight the Conference Leader folder within the Contacts folder by clicking on it once.
- 8. Select **View** from the menu bar.
- 9. Select **Current View** from the menu.
- 10. Select Detailed Address Cards.

Note: Only one Conference Contact is allowed at any one time.

#### Managing Your Conference Leaders



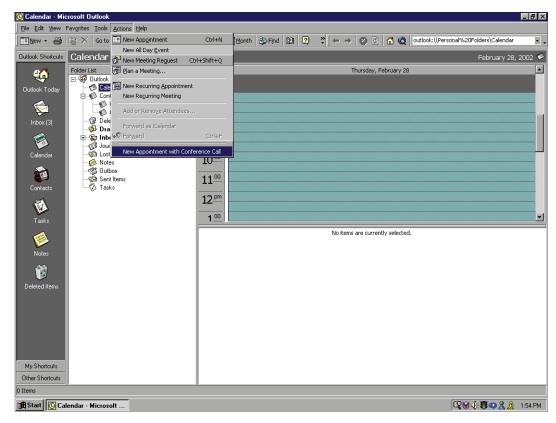
You can add multiple leaders with various profiles and CRC or billing information. To do this:

- 1. Make sure the Folder List is displayed by selecting View from the menu bar and selecting Folder List.
- 2. Expand your **Contacts** folder by clicking on the + sign to its left or by double-clicking the **Contacts** folder.
- 3. Highlight the **Conference Leaders** folder within the **Contacts** folder by clicking on it once.
- 4. Select **Actions** in the menu bar.
- 5. Select New Conference Leader from the menu.
- 6. Fill in the details for each leader's profile, including Leader's Name, Phone Number, Online Login Name, Authorization Code, Customer Reference Code (CRC) or Billing Code, and Time Zone. You are also provided with the opportunity to set up Audio and Net Conference defaults for each leader.

Note: Your defaults can be changed when you schedule a call.

#### Scheduling a Conference Call

- 1. Click on Calendar.
- 2. Go to Actions in the menu bar.
- 3. Select New Appointment with Conference Call.



- 4. Click on **Invite Attendees**. Add the names of your conference participants, either by using the Address Book or by manually typing each participant's e-mail address.
- 5. Type in the **Subject** of the conference call.
- 6. Select **Date** and **Time** of conference call.

🇱 Untitled - Appointment with Conference Call	- D ×
Elle Edit View Insert Format Tools Actions Help	
Save and Close 🖨 🛽 🕂 Recurrence 👰 Invite Attendees 🕴 🗼 🗙 🔺 🗸 🔸 🗸 🗸 🗸	
Appointment Conference Call Attendee Availability	
Subject:	
Location: This is an online meeting using: Microsoft NetMeeting	~
Start time: Mon 9/23/2002 V 8:00 AM V All day event	
End time: Mon 9/23/2002 S:30 AM	
Reminder: Sminutes Show time as: Busy	
	<u> </u>
	<b>_</b>
Contacts	Private 🗖

7. Select the **Conference Leader** from the pull-down menu. The fields will populate with the selected leader's information.

🛄 Untitled - Appointment with Conference Call	
Eile Edit View Insert Format Tools Actions Help	
Save and Close 🛛 🕼 🕀 Recurrence 🖗 Invite Attendees	1 + X + + + 2 -
Appointment Conference Call Attendee Availability	
Confirmation:	
Confirmation Number:	Net Conference URL:
Conference Passcode:	Net Conference #:
Toll Free Number:	Audience Passcode:
Toll Number:	Leader Passcode:
Internal Number:	
Conference Leader:	Entry Types:
Name:	Tone In/Tone Out     O Silent Entry/Exit
Authorization Code: Melissa A. Allen	Net:
Time Zone: Linda Almond	
Online Login Name:	Net Leader Passcode: Net participants:
Customer Reference Code	Features: Recording:
(CRC) or Billing Code:	Operator Hosted     Inet Replay Duration 30 days
Phone Numbers and Lines:	Net Participant List
	55L Encryption
Total number of lines (including leader) needed for participants dialing into the conference:	Ouestions? Please call 1-800-857-8777.
🗖 Toll Free (e.g. 800, 877, 888, etc.)	Questions: Prease call 1-000-037-0777.
Internal Dialing Plan	
Toll (e.g. 312, 773, 212, etc.)	Schedule Conference Call

#### 8. Select the **number of lines** needed for this call.

**Note:** If the Net Conference check box is checked, the maximum number of lines is 100. If the Net Conference check box is not checked, the maximum number of lines is 20.

🛄 Untitled - Appointment with Conference Call	
Eile Edit View Insert Format Tools Actions Help	
🛛 🖃 Send 🛛 🎒 🕕 🔯 🎭 🕂 🕀 Recyrrence 🎕 Cancel Invitation	n 🚦 🕂 🗙 🕲 🗸
Appointment Conference Call Attendee Availability	
Confirmation:	
Confirmation Number:	Net Conference URL:
Conference Passcode:	Net Conference #:
Toll Free Number:	Audience Passcode:
Toll Number:	Leader Passcode:
Internal Number:	-
Conference Leader:	Entry Types:
	Tone In/Tone Out O Silent Entry/Exit
Authorization Code: 5155555V	Net:
Time Zone:	Net Conference
Online Login Name: almond	Net Leader Passcode:           Linda         Net participants:
Customer Reference Code 12345678	Features: Recording:
(CRC) or Billing Code:	Coperator Hosted
Phone Numbers and Lines:	Net Participant List
Total number of lines (including leader) needed for 25	SSL Encryption
participants dialing into the conference:	Ouestions? Please call 1-800-857-8777.
Toll Free (e.g. 800, 877, 888, etc.)	
✓ Internal Dialing Plan	
Toll (e.g. 312, 773, 212, etc.)	Schedule Conference Cancel Conference Call

- 9. Select the type of **Phone Numbers and Lines** you wish to use for this call.
- 10. Select any **Features** you would like for your call, including any Net Conference features.

Click the Schedule Conference button.

🛄 Untitled - Appointment with Conference Call	
Eile Edit View Insert Format Iools Actions Help	
🛛 🖃 Send 🛛 🎒 🚺 🔯 🎭 🔂 Recurrence 🕵 Cancel Invitation	! + × 2.
Appointment Conference Call Attendee Availability	
Confirmation:	
Confirmation Number:	Net Conference URL:
Conference Passcode:	Net Conference #:
Toll Free Number:	Audience Passcode:
Toll Number:	Leader Passcode:
Internal Number:	
Conference Leader: Name: Linda Almond	Entry Types: • Tone In/Tone Out  • Silent Entry/Exit
Authorization Code: 5155555V	Net:
	Vet Conference
Time Zone: Central Time	Net Leader Passcode:
Online Login Name: almond	Linda Net participants: 25 🗧
Customer Reference Code 12345678 (CRC) or Billing Code:	Features: Recording:
(CRC) or bining code.	🗖 Operator Hosted 👘 Net Replay Duration 30 📩 days
Phone Numbers and Lines:	Vet Participant List
Total number of lines (including leader) needed for	SSL Encryption
participants dialing into the conference:	Ouestions? Please call 1-800-857-8777.
🔽 Toll Free (e.g. 800, 877, 888, etc.)	Questions: Please call 1-000-007-0777.
🔽 Internal Dialing Plan	
Toll (e.g. 312, 773, 212, etc.)	Calendary Construction Collins
	Schedule Conference Cancel Conference Call

The following screen shots are examples of windows you will see during the rest of the scheduling process.

#### **Appointment With Conference Call**

Click OK.



#### **Conference Call Confirmation**

Click OK.

Conference Call Confirmation	×
Your conference call has scheduled successful	ully!
<u> </u>	

#### **Conference Call Confirmation**

This pop-up reminds you how to cancel the call in Outlook.

Click OK.

Note: Please see the next section, "Canceling a Conference Call."



#### Appointment With Conference Call

1. The **Appointment** tab displays the call details.

For your reference: The Confirmation Number is displayed on the Conference Call tab.

You can even type a note to your participants and add an attachment!

Finally, click **Send** to send the e-mail notification to your conference participants.

🕮 Example - Appointment with Conference Call	_   D   ×
Eile Edit View Insert Format Tools Actions Help	
🖅 Send 🚭 🕕 📴 🕵 🕂 Recurrence 🎇 Cancel Invitation 🕴 🖡 🗙 😨 🗸	
Appointment Conference Call Attendee Availability	
O Invitations have not been sent for this meeting.	
To Linda Almond (E-mail)	
Subject: Example	
Location: This is an online meeting using: Microsoft NetMeeting	~
Start time:         Mon 9/23/2002         ▼         8:00 AM         ▼         □ All day event	
End time: Mon 9/23/2002 V 8:30 AM V	
- M Reminder: Sminutes V Show time as: Busy	
-Q- Reminder: 5 minutes Show time as: Busy	
= You are invited to join an Audio/Net Conference. Details of your meeting are as follows:	
Conference Call Date: 9/23/2002 Conference Call Time: 8:00 AM Central Time	
Internal Number: 333-1208	
Conference Passcode: 1402239	
Toll Free: 888-373-3590 Toll: 1-712-257-3731	
Meeting Number: P91402239	
Meeting Passcode: 1402239	
Meeting URL: <u>http://166.36.199.6/nc/join.php?i=P91402239&amp;p=1402239&amp;t=c</u>	
FIRST TIME NET USERS	
1. Go to http://166.36.199.6/ and click on 'Join Net Conference'	_
2. Type in the Meeting Number and passcode	-
<u>Contacts</u> Categories	Private 🗖

Tip: You can add your Signature to the bottom as you would a regular e-mail.

2. E-Scheduling Tools will now automatically populate your Calendar with the scheduled conference call.

To view the call information in the future, **double-click** on it from the Calendar view.

💽 Calendar - Microsoft Outlook	
File Edit View Favorites Tools Action	
	The Day S Work Week T Week B 2
	👼 Day/Week/Month
Calendar	September 23, 2002 🧖
Folder List ×	Monday, September 23
Outlook Today - [Personal Folders]	
	8 am 225位 (Conference Call) Example
Conference Contact	
Conference Leaders	9 <sup>∞</sup>
Deleted Items     Deleted Items	1000
🕀 🙀 Inbox	10 <sup>00</sup>
	1100
Notes	
	12 <sup>pm</sup>
Cont Items	
	======================================
	Tod are invited to join an Addio/Net conterence. Details of your meeting are as follows.
	Conference Call Date: 9/23/2002
	Conference Call Time: 8:00 AM Central Time Internal Number: 333-1208
	Conference Passcode: 1402239
	Toll Free: 888-373-3590
	Toll: 1-712-257-3731 Meetina Number: P91402239
	Meeting Passcode: 1402239
	Meeting URL: <u>http://166.36.199.6/nc/join.php?i=P91402239&amp;p=1402239&amp;t=c</u>
1 Item	

#### **Canceling a Conference Call**

Deleting a conference call from your Calendar does not cancel that call with your service provider. Below are the steps necessary to cancel a conference call.

- 1. Open the Conference Call by **double-clicking** on it in your Calendar.
- 2. Click on the **Conference Call** tab.
- 3. Click on the **Cancel Conference Call** button.

Meeting - Appointment with Conference Call			
Eile Edit View Insert Format Iools Actions Form Layout Help			
Start NetMeeting Start NetMeeting	NetShow 🖉 Join Conference 🎒 🗓 🧖 Invite Attendees ! 🐥		
Appointment Conference Call Attendee Availability			
Confirmation:			
Confirmation Number: 2786174	Net Conference URL: http://e-meetings.wcom.com/nc/join/		
Conference Passcode: 2786174	Net Conference #: P12786174		
Toll Free Number: 888-790-1641	Audience Passcode: 2786174		
Toll Number: 1-773-756-4602	Leader Passcode: Diahn		
Internal Number: 857-0700			
Conference Leader:	Entry Types:		
Name: Diahn Martins	Tone In/Tone Out     Silent Entry/Exit		
Authorization Code: 1105443V	Net:		
Time Zone: Mountain Time	Net Leader Passcode:		
Online Login Name: dmartins	Diahn Net participants: 25		
Customer Reference Code 41722 (CRC) or Billing Code:	Features: Recording:		
(CRC) or binning code.	Coperator Hosted		
Phone Numbers and Lines:	Net Participant List		
Total number of lines (including leader) needed for	SSL Encryption		
Questions? Please call 1-800-857-8777.			
🔽 Internal Dialing Plan			
Toll (e.g. 312, 773, 212, etc.)	Reschedule Conference Call		

**Note:** You will see the button has changed to **Reschedule Conference**, and the Cancel Conference Call button is no longer grayed out.

4. Click Yes.

Appointment with Conference	e Call	X
Are you sure you want to cance	el the scheduled	conference call?
<u>Y</u> es	No	

Appointment	with Conference Call	×
This action ma	ay require a few moments, please click OK to cancel t	ne conference call.
	OK Cancel	
6. Click <b>OK</b> .		
Appointment	t with Conference Call 🔀	
	t with Conference Call	

7. Click Yes, if you want to delete this Appointment with Conference Call from your Calendar.

.

Appointment with Co	nference Call	×	
Do you want to also delete this appointment?			
( <u>Y</u> es	No		

Note: If you choose "No," the canceled call will remain in your Calendar.

8. Make your selection and click OK.



9. To send a notification to conference participants, type in your message and then click Send.

Otherwise, if no attendees were previously invited, click Save and Close.

🗰 Meeting - Appointment with Conference Call	
Ele Edit View Insert Format Iools Actions Form Layout Help	
📙 🖬 Save and Close 🛛 🐲 Start NetMeeting 🛛 🐲 Join NetMeeting 🖌 View NetShow 🛛 🀲 Join Conference 🖨 🖉 🧖 Invite Attendees	··· 🕴 🚦
Appointment Conference Call Attendee Availability	
Subject: Meeting	
Location: This is an online meeting using: Microsoft NetW	leeting 🔽
Start time:         Mon 4/7/2003         Image: 8:00 AM         Image: All day event	
End time: Mon 4/7/2003 V 9:00 AM	
-Ú- Reminder: 15 minutes Show time as: Busy	
Q- Reminder: 15 minutes Show time as: Busy	
You are invited to join an Audio/Net Conference. Details of your meeting are as follows:	
Conference Call Date: 4/7/2003	
Conference Call Time: 8:00 AM Mountain Time	
Internal Number: 857-0700	
Conference Passcode: 2786174 Toll Free: 888-790-1641	
Toll: 1-773-756-4602	
Meeting Number: P12786174	
Meeting Passcode: 2786174	
Meeting URL: <a href="http://e-meetings.wcom.com/nc/join.php?i=P12786174&amp;p=2786174&amp;t=c">http://e-meetings.wcom.com/nc/join.php?i=P12786174&amp;p=2786174&amp;t=c</a>	
FIRST TIME NET USERS	
1. Go to http://e-meetings.wcom.com/ and click on 'Join Net Conference'	
2. Type in the Meeting Number and passcode 3. Choose 'Conference'	
Contacts	Private



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