Conference Manager enables leaders to schedule and manage conferences as well as generate reports. This User Guide describes the steps involved to manage your conference.

Questions? We are here 24/7 to help.
Call (877) 709-8255
Email csr@conferencegroup.com

User/System Requirements

Web Browser
- Internet Explorer 5.5 with Microsoft JVM Release 5.0.0.3810 or Sun JVM v1.4.0_03
- Internet Explorer 6.0 with Microsoft JVM Release 5.0.0.3810 or Sun JVM v1.4.0_03

Client Operating Systems
- Microsoft Windows NT
- Microsoft Windows 2000
- Microsoft Windows XP Professional

Email Clients
- Microsoft Outlook 2000, 2003

Log on
1. Start your Web browser.
2. Log in at https://confmgr.conferencegroup.com. The Login screen is displayed. Figure A.

3. Enter your e-mail address in the E-mail field. Enter your password in the Password field and click Login. The My Schedule screen is displayed. Figure B.

Please Note: Passcodes may be a maximum of 8 characters in length. If you enter more than 8 characters, it will only recognize the first 8 characters as your passcode.

Scheduling Conferences
Conference Manager enables you to schedule customized conferences to meet your exact requirements. For example, you can schedule recurring conferences, notify participants by e-mail and configure various features such as security, name record, tones, etc.
Creating Reservations

1. Click Book meeting. The Schedule Screen is displayed. Figure C.
2. Enter the name of your conference in the Conference Name field.
3. Enter the number of participants in the Number of Participants field.
4. Select the conference date from the Date of Conference drop down list.
5. Select the conference start time from the Conference Start Time drop down list.
6. Select the Time Zone from the Time Zone drop down list.
7. Enter the conference duration in the Conference Duration field. The minimum is 10 minutes.
8. Click Book.

Setting up Recurring Conferences

1. Complete steps 1-8 in “Creating Reservations”.
2. Click Recurrence.
3. Select Make this conference a recurring event.
4. Select the frequency of the repeating conference from the Frequency drop down list.
5. Select the appropriate checkboxes to exclude particular days from the recurrence pattern.
6. Click Book.

Advanced Conference Options

Enabling Name Record Playback
Participants can be prompted to record their name before they enter the conference. This recording can be played to an Individual or to the entire Conference.

1. Complete steps 1-8 in “Creating Reservations”.
2. Click Advanced.
3. Select Individual or Conference from the drop down list.
4. Click Book.

Enabling Entry and Exit Tones
Entry and exit tones can be enabled and disabled on a per conference basis.

1. Complete steps 1-8 in “Creating Reservations”.
2. Click Advanced.
3. Drop down list is defaulted to System (On) and can be changed to Off.
4. Click Book.
**Enabling Leader Hang-up**

If enabled, when the Leader disconnects from the conference, everyone is disconnected.

1. Complete steps 1-8 in “Creating Reservations”
2. Click Advanced.
3. Click Moderator Hang Up.
4. Click Book.

The Reservation details screen is displayed and the conference moderator can now lock the conference.

**Enabling Billing Code Prompt**

Conference Leaders are prompted to enter a numeric code (Up to 20 numbers) followed by the # key prior to gaining access to the conference. This code will appear on the invoice, enabling the Leader to track conference usage at the individual client level.

1. Complete steps 1-8 in “Creating Reservations”
2. Click Advanced.
3. Click Billing Code Prompt.
4. Click Book.

The Reservation details screen is displayed and the conference moderator can now lock the conference.

**Enabling Music Source**

This prevents Participants from conferencing until the leader had initiated the conference. It also informs Participants that they have arrived in the conference.

1. Complete steps 1-8 in “Creating Reservations”
2. Click Advanced.
3. Select ON from the Music Source drop down.
4. Click Book.

The Reservation details screen is displayed and the conference moderator can now lock the conference.

**Enabling Conference Lock**

Enabling conference lock permits the conference moderator to lock the conference. No further participants are allowed into the conference once it is locked.

1. Complete steps 1-8 in “Creating Reservations”
2. Click Advanced.
3. Click Allow Conference Lock.
4. Click Book.

*NOTE: that Locking/Unlocking a recorded conference will stop the recording.*

The Reservation details screen is displayed and the conference moderator can now lock the conference.
Edit Your Reservations

Making Changes to Reservations
After you confirm the reservation you can change the details associated with it.

1. Click **Amend Reservation Details** in the Reservation Details section.
   The Reservation Details Screen is displayed. **Figure E.**
2. Click **Update**.
3. Modify the details as required.
4. Click **Update**. The updated reservation details are displayed.
5. Click **Done**.
6. Click **Done**.

The My Schedule/ Welcome page is displayed. The updated conference has been added to the schedule.

You can also make changes to reservations by clicking **Edit** on the My Schedule/ Welcome screen. This only applies to future conference reservations.

Invite Participants
Inviting participants to your conference enables you to send an e-mail to selected conferees. You can do this by using Microsoft Outlook™ or another e-mail application. Download our custom Outlook Plug-in now.

Inviting Participants using Microsoft Outlook™

1. Complete steps 1-8 in “Creating Reservations”.
2. Click Invite at the Invite Participants via email section of the Email invitations area.
   Note: The conference details are automatically entered in the main body of the e-mail.
3. Enter the e-mail addresses of the participants that you want to invite in the To or CC area.
4. Click Send.

The selected participants receive and e-mail outlining the conference date, time and access details.

Inviting participants using browser e-mail

1. Complete steps 1-8 in “Creating Reservations”.
2. Click Invite at the Invite participants by browser email section of the Email Invitations area.
3. Copy and paste the text into an email.
4. Enter the email addresses of the participants that you want to invite to the conference in the To or CC area.
5. Click Send.

The selected participants receive an e-mail outlining the conference date, time and access details.
Creating an appointment leader’s/participant’s calendar

1. Complete steps 1-8 in “Creating Reservations” above.
2. Click Create in the area of the Outlook Calendar section.
3. Note: Click Create next to the Leader to send the Leader an email only or Click Create next to the Invite Participants to invite participants only.
4. The outlook appointment window will be launched.
5. Invite attendees as desired and hit Send. Or simply save and close to add the event to your calendar.

The Appointment is placed in your Microsoft Outlook™ calendar and on those that you have invited. The selected participants receive an e-mail inviting them to the conference. An appointment is created in their Microsoft Outlook™ calendar if they accept the invitation.

Viewing Scheduled Conferences

You can view your scheduled conferences by date, keyword or reference number. You can enter a date range and view the conferences that are scheduled to take place between those dates. You can also enter a reference number or a keyword and view the details associated with that particular conference.

Searching for Conferences by Date, Reference Number, Keyword

1. Click My Schedule. Search for Conferences Screen is displayed. Figure H.
2. Select a date, reference number, or Keyword in the appropriate field.
3. Click Search.

Making Changes to Scheduled Conferences

1. Click Edit beside the scheduled conference you would like to modify
2. Modify the scheduled conference details as required.
3. Click Update.

Adding New Participants to Address Book

1. Click Address Book.
2. Click New Contact.
3. Enter the new participants’ name in the Name field
4. Enter the new participants’ e-mail address in the Contact Email field.
5. Enter the new participants’ dial out from conference number in the Dial Out Number field.
6. Enter a brief description of the new participant in the Description field.
7. Click **Add to Address Book**.
8. The new participants’ details are saved to your address list.

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**Reports**

**Generating Reports**

You can generate graphical representations of conference activity.

1. Click **My Account**.
2. Click **Conference Reports**.
3. Select what type of report you want to generate.
4. Select the date that you want the report generation to start from the Start Day drop down list.
5. Select the date that you want the report generation to end from the End Day drop down list.
6. Select, from the following options, the chart type. The report data is displayed in this format:
   - Vertical Bar Chart
   - Line Chart
   - Pie Chart
   - Area Chart
   - Stacked Area Chart
   - Horizontal Bar Chart
   - 3D Vertical Bar Chart
   - 3D Horizontal Bar Chart
   - 3D Stacked Vertical Chart
7. Click **Generate Report**.

The report is generated and the graphical representation of the data is displayed on your screen.

**Viewing Report Details in a Microsoft Excel™ spreadsheet**

You can also view the report output in more accurate detail by creating a .csv file.

1. Complete steps 1-7 in “Generating Reports”.
2. Click **Report CSV File**.
3. Select whether you want to open the Microsoft Excel™ spreadsheet from it's current location or save it to your hard disk and click **OK**.
4. Enter a location to save the file and click **Save**.
   The Microsoft Excel™ spreadsheet is saved to that location.