

# Conference Manager

## 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.**



Figure A. Login Screen

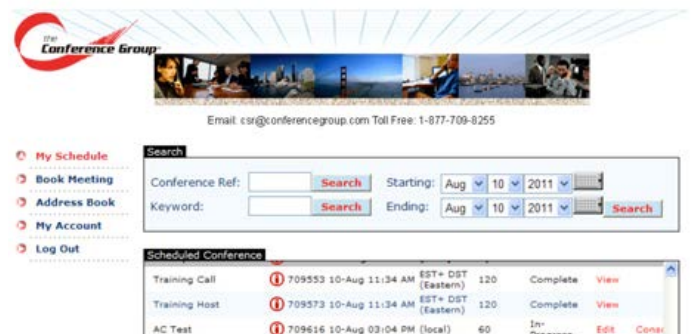


Figure B. My Schedule Screen

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.

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](mailto:csr@conferencegroup.com)**

## 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**.

Figure C. Schedule Screen

## 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**.

Figure D. Recurring Event Settings

### 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 **Ammdend 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**.



Figure E. Reservation Details

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.



Figure F. Reservation Details

The selected participants receive an 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.



Figure G. Outlook Calendar Tab

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**.

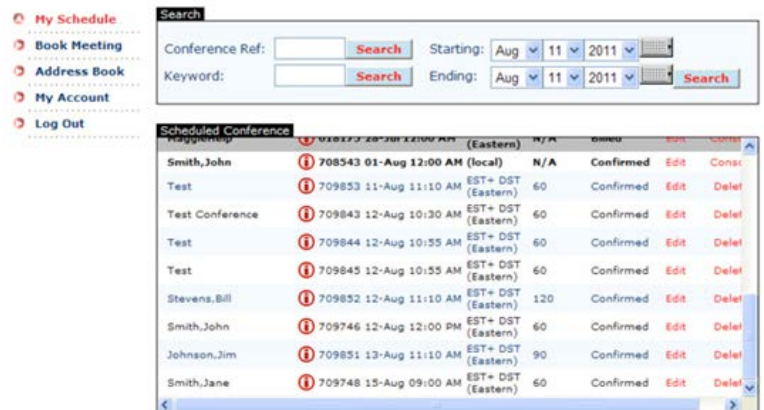


Figure H. Schedule Conference Screen

## 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.

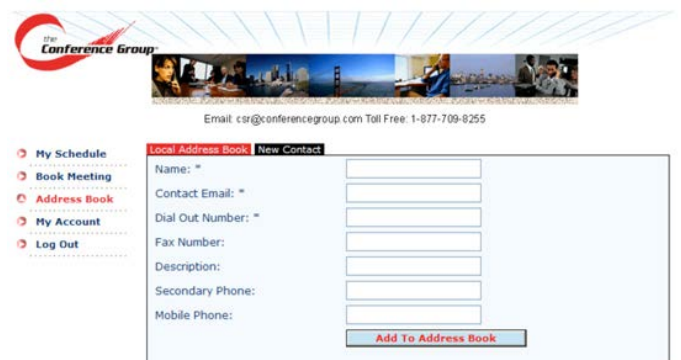


Figure I. Address Book

7. Click **Add to Address Book**.
8. The new participants' details are saved to your address list.

## 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**.

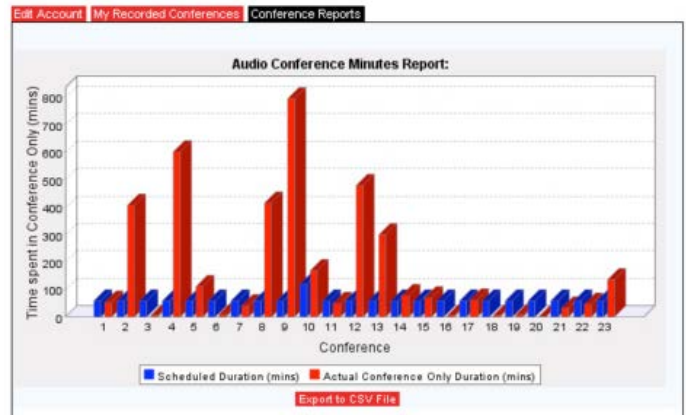


Figure J. Horizontal Bar Chart

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.