ConferenceManager™

Scheduling with Microsoft® Outlook®

If you use Microsoft Outlook, you can install an add-in that allows you to schedule ConferenceManager conferences directly through Outlook — you can access your Outlook address book, invite participants (and check participant availability), and book recurring conferences just as you would with any other meeting. Also, you can use Outlook's Delegates feature to allow someone to schedule conferences on your behalf. Verify with your system administrator that your Class of Service allows Outlook Features.

If you use Outlook to schedule conferences, try to do so consistently — while scheduling activities in Outlook are synchronized to ConferenceManager, any scheduling you do in ConferenceManager is not synchronized back to Outlook. For example, conferences scheduled in Outlook but canceled from ConferenceManager will not be removed from the Outlook calendar.

Install the Outlook Add-In

The Microsoft Outlook add-in allows you to schedule ConferenceManager conferences from within Outlook.

Step 1: Close all Outlook windows and exit Outlook.

Step 2: From the My Conferences page, click **My Account**

Step 3: Click **Outlook Add-In** to display the Install Outlook Add-In window.

Step 4: Click **Run**.

Step 5: Select your installation options and click Install.

   If a security warning appears, click **Yes** to continue the installation.

Step 6: When the installation is complete, click **Close**.

Step 7: Launch Outlook to complete the installation.

> Note: The Outlook add-in requires Visual Studio 2010 Tools for Office Runtime and .Net framework 4.0 or higher, which your administrator may need to install.

Configure Outlook Options

Outlook stores your Conference ID, PIN, and conferencing system URL so you can schedule conferences without authenticating.

Step 1: In Outlook, click the Sonexis tab on the ribbon.

Step 2: Click **ConferenceManager Options**.

Step 3: Enter your Conference ID and PIN.

   Phone number is optional.

Step 4: If necessary, enter the Server URL.

   The URL may already be present if your administrator installed the Outlook add-in on your PC.

Step 5: Click **OK** to save your changes.

   If you change any of this information within ConferenceManager, you must make the same changes in Outlook.

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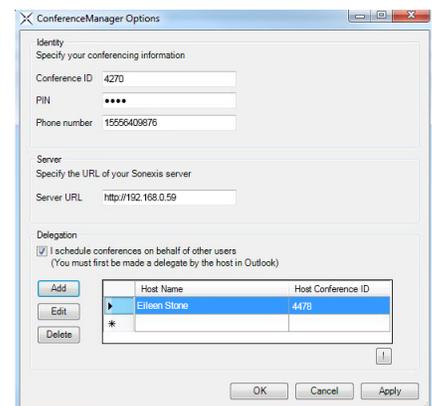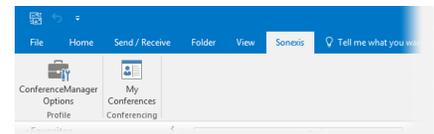
Schedule a Meeting

Step 1: Create a new Meeting in Outlook.

Step 2: Complete the Appointment and Scheduling tabs of the New Meeting form and invite participants as usual.

Step 3: In the ConferenceManager section of the ribbon, click to select the Audio and/or Web buttons as appropriate.

In some cases tour administrator may opt to provide a single button for both. Outlook passes the necessary scheduling information to ConferenceManager and reserves the necessary ports.

Step 4: To override your default preferences for this meeting, click Meeting Options and make any changes necessary (described in the following section).

Step 5: Click **Send**.

Modifying Conference Options

Clicking Meeting Options from the New Meeting form displays the Advanced Options window; make any changes necessary and click OK to return to the New Meeting form. Note that many options require particular conferencing system licenses or Class of Service settings; see your system administrator if you have questions regarding the options available to you.

Item	Description
Reservations	ConferenceManager automatically reserves a port for each invitee plus one for the host. If allowed, you may override that default or select Reservationless Conference to schedule the conference without reserving ports. Click Port Availability to view the number of available ports.
Include phone numbers of type	When you select contacts from Outlook, the specified work/home/mobile phone types will automatically be added to the invitee list.
Record Audio	Select Record audio to record the audio portion of the conference for future download or playback.
Create PINs	PINs add more security, and they allow the system to recognize participants as they enter the conference. Select this option to generate a unique PIN for each conference participant. If your administrator allows Persistent PINs, participants are assigned the same PIN for every conference for which this option is enabled. You may not be able to view participants' PINs.
Optional	If Create PINs is selected, selecting Optional allows participants to enter the conference without using their PIN.
Conference Password	To require a password for conference entry, enter a 4-8 digit number.
Account Code	To assign an account code to the conference, enter 2-15 digits. Administrators may enable or even require an Account Code if they track conferencing usage for cost center billing or other purposes.
Preferences	Click [...] to override your default preferences for this conference only; make changes as necessary and click OK. Preferences are described in the online help, User's Guide, and Account Setup Task Card.

Using Delegates to Schedule Conferences

ConferenceManager's Outlook integration allows you to assign delegates (an admin or meeting planner, for example) to schedule conferences on your behalf. Both you and your delegate must configure Outlook as outlined below; see the ConferenceManager Online Help for details.

Step 1: You (the host) must assign a delegate from your Outlook account.

Step 2: The delegate configures your host information in their Outlook's ConferenceManager Options.

Step 3: The delegate can then schedule a conference on your behalf by selecting a time slot on your Outlook calendar and scheduling a meeting as usual.

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