



Conference PlaceSM

Getting Started Guide



For more information:
877.333.2666
www.intercall.ca

Managing your User Account

LOGGING IN AND OUT

You must log into the Conference Place website to access your account features and to schedule and start your meetings.

To log into Conference Place:

- 1 Go to www.conferenceplace.ca and click on Start or Schedule a Meeting.
- 2 Enter your user login and password.
- 3 Click Submit

To log out of Conference Place:

To log out of your Conference Place website, click Log Out on the navigation bar at the top of the page.

SET USER PREFERENCES

In your Meeting Manager, you can change the user password to one that is easier for you to remember. You can also set other user preferences for your account.

To change your password:

- 1 On the Conference Place My Home page, click User Preferences.
- 2 In the Old password box, enter your current password. In the New password box, enter your new password. In the Confirm new password box, enter the new password again.
- 3 Click OK.

Powered by

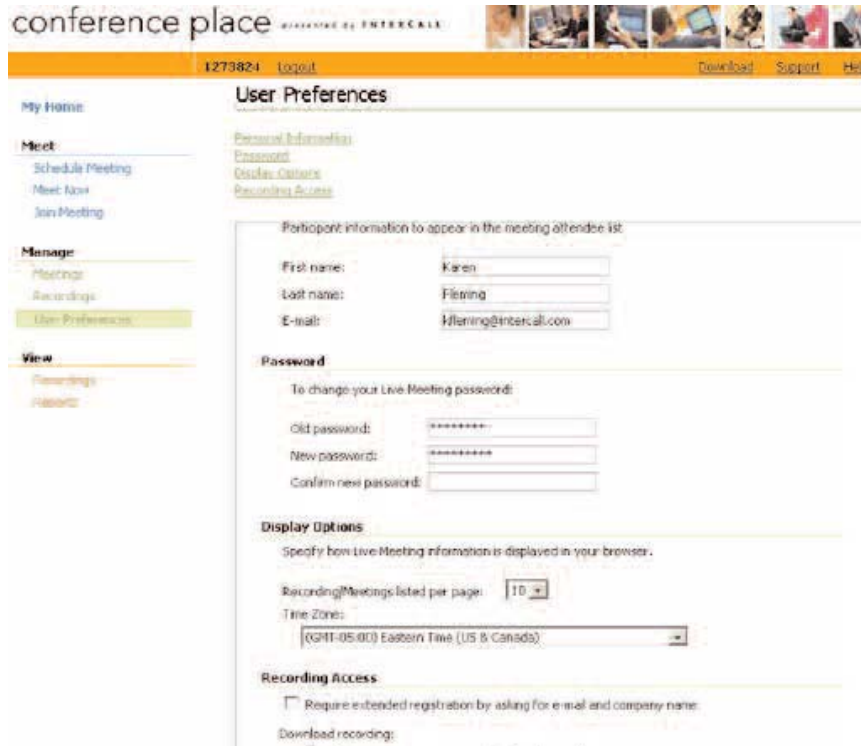


 InterCall is a subsidiary
of West Corporation

AAP/EOE

Microsoft and the Microsoft Office Logo are either trademarks or registered trademarks of Microsoft Corporation in the United States and/or other countries.

Last modified on: 6/4/2007



If you need to make changes, select the appropriate option, make the necessary change, and then click OK. For more information, see **How to Set User Preferences**.

SET AND TEST OPTIONS FOR MEET NOW MEETINGS AND FOR SCHEDULED MEETINGS

Conference Place provides two kinds of options that you should set before meeting with other participants:

- + Meet Now options apply to unscheduled meetings that are initiated spontaneously (Meet Now meetings). Meet Now functions as a virtual workspace where you can invite participants to meet without formally scheduling a meeting.
- + Scheduled meeting options apply to meetings that you schedule in the traditional manner. For example, scheduled meetings have a start and end time.

In many cases, your meeting options will be already set for you. However, you should ensure that your InterCall audio settings are set correctly. Audio settings include your Reservationless-PlusSM “800” number, conference code, and leader PIN.

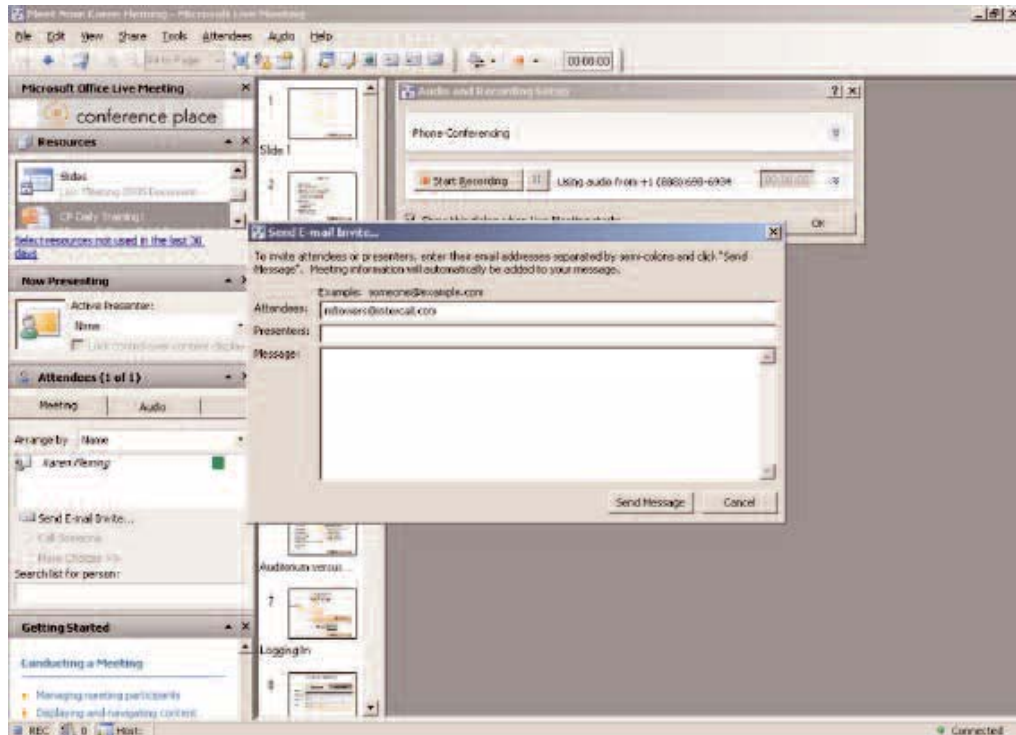
For information about setting and testing your audio options, see **How to Set Up Audio for Conference Place**.

For information about setting all other user options for Meet Now meetings and scheduled meetings, see **How to Set Meeting Options**.

To test Meet Now options:

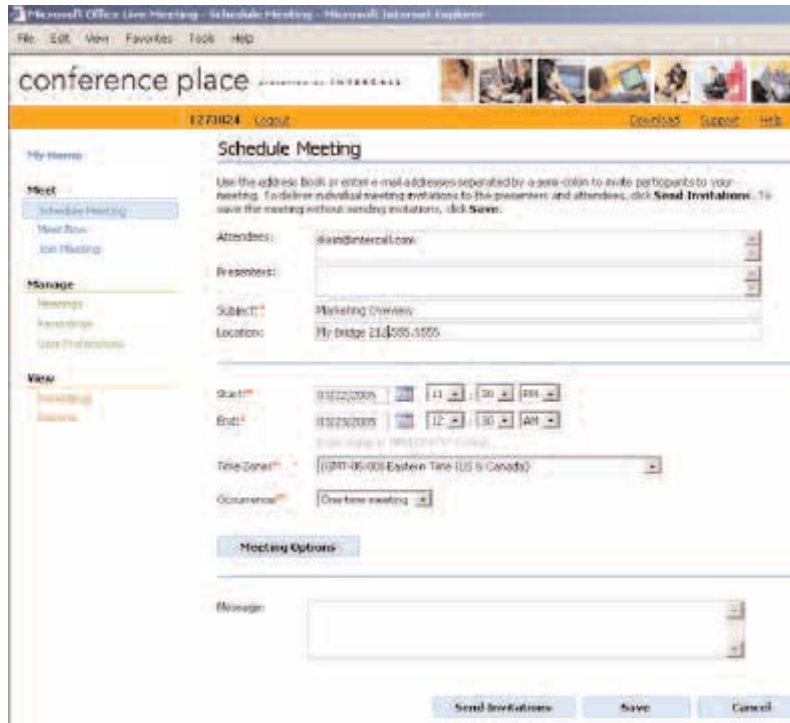
- 1 On the Meet menu, click Meet Now.
- 2 On the Attendees menu, click Send E-mail Invite.
- 3 In the Attendees and Presenters boxes, type your full e-mail address, for example, someone@example.com, and then click Send.

- 4 In your e-mail program, open the invitations that you just sent. You will receive one for your role as presenter and another one for your role as attendee. The messages may take a few minutes to arrive. When they do, open the invitations and ensure that the audio conferencing information is correct, including the audio conferencing number and the participant passcode.



To test scheduled meeting options:

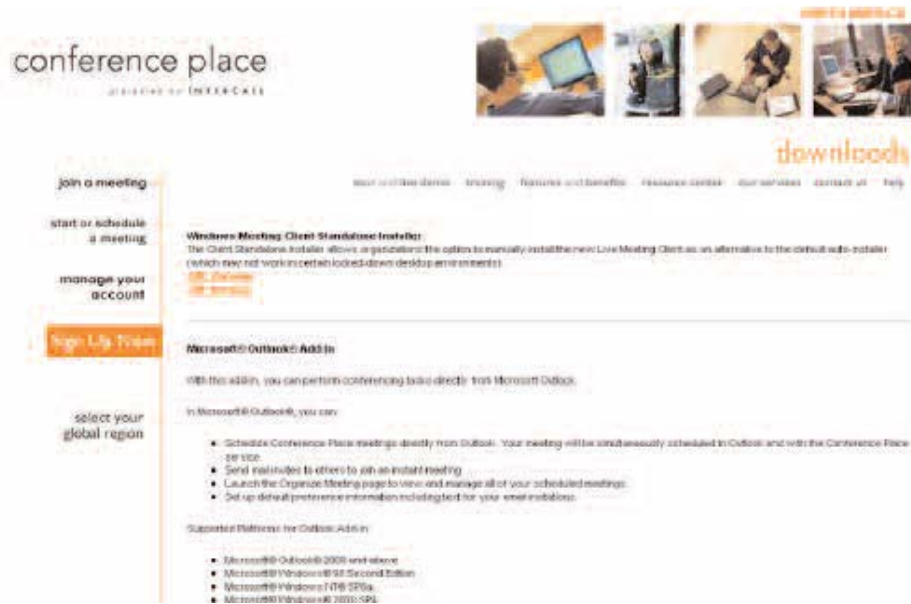
- 1 On the Meet menu, click Schedule Meeting.
- 2 In the Attendees and Presenter boxes, type your full e-mail address, for example, someone@example.com.
- 3 In the Start box, select the current time as the start time. In the End box, select an appropriate end time.
- 4 Click Send Invitations to send the invitations to yourself. In your e-mail program, open the invitations that you just sent. The messages may take a few minutes to arrive. When they do, open the invitations and ensure that the audio conferencing information is correct, including the audio conferencing number and the participant passcode.



DOWNLOAD ADD-INS

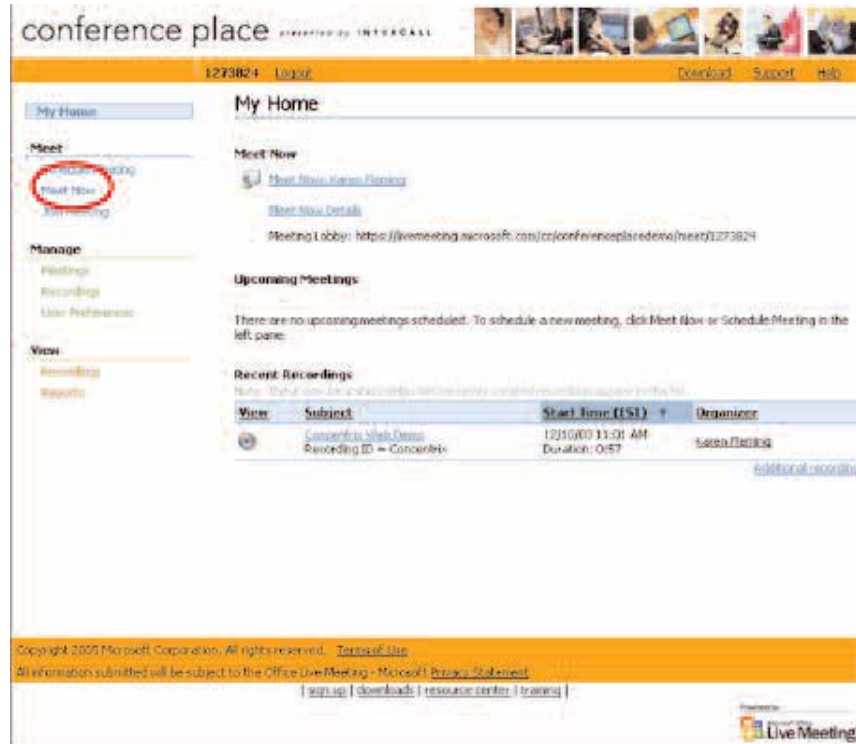
Conference Place offers add-ins that integrate with other Microsoft products. The Outlook® add-in adds a Live Meeting menu directly in Outlook, making it easier for you to schedule Conference Place meetings.

To learn about and install the add-ins that are currently available for Conference Place, visit the Conference Place 2005 Downloads page. Each add-in includes additional information about specific Conference Place tasks the add-in can help you with.



CHECK YOUR CONFERENCE PLACE SETUP

The best way to check your Conference Place setup is to actually use Conference Place to schedule a few test meetings and to meet instantly by using Meet Now. To get started with this process, see How to Get Started Quickly.



How to Set User Preferences

User preferences provide basic information about you to the Conference Place service, including your name, your e-mail address, your Conference Place password, and your display and recording preferences. You control user preferences in two places:

- + Conference Place Manager
- + Conference Place Online Meeting Console

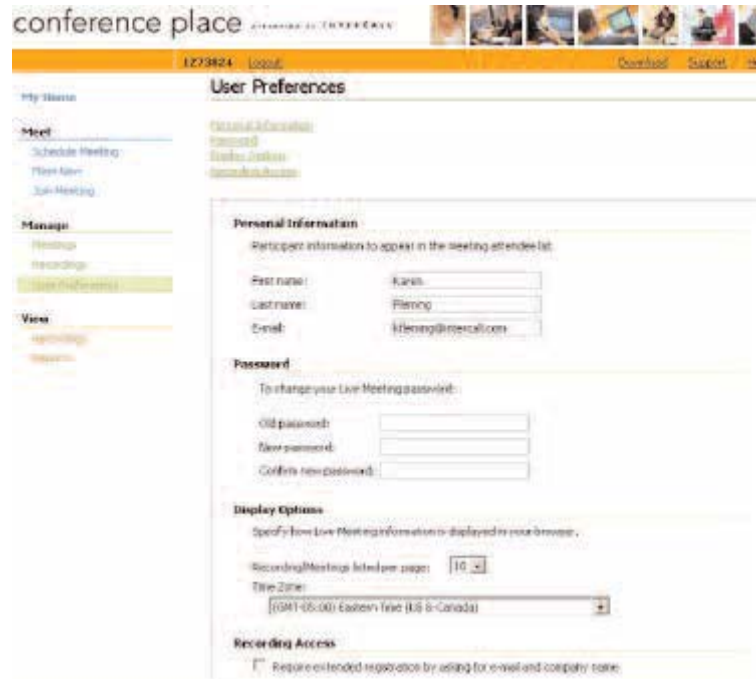
Some preferences can be controlled in both the Conference Place Manager and the Conference Place Online Meeting Console. When you change one of these user preferences in one place, the change is reflected in the other.

SET YOUR USER PREFERENCES IN CONFERENCE PLACE MANAGER

You can use Conference Place Manager to control your personal information, connection speed, and access to recording. If you install the Conference Place Add-In Pack, you can also control add-in setup in the Conference Place Manager, or you can access these preferences in the Start menu on your Microsoft Windows computer.

To set your user preferences in Conference Place Manager:

- 1 On the My Home page, under Manage, click User Preferences.
- 2 On the User Preferences page, enter the following information:



- + In the Personal Information section, type your first name, last name, and full e-mail address (for example, someone@example.com).
 - + In the Password section, you can change your password. To do so, type your old password in the Old password box. Type your new password in the New password box, and then type the new password once again in the Confirm new password box.
 - + In the Display Options section, indicate the number of meetings or recordings you want Conference Place Manager to display on a single page, and select your local time zone.
 - + In the Recording Access section, if you want to require the e-mail address and company name of participants who want to access recordings, select the Require extended registration by asking for email and company name check box. To allow anybody to download meeting recordings, or to allow only meeting organizers to download recordings, click the appropriate option.
- 3 Click OK to save your user preferences. Conference Place will use these preferences for all the meetings you attend.

How to Get Started with Conference Place

Joining a meeting in Conference Place may seem simple but the more you know about joining, the more productive you can be. For this tutorial, we will take you through the process of joining a meeting, both as an attendee and a presenter. We will study the meeting invitation, which is your entry point into the meeting, and help you understand how to use the information in the invitation to get into the meeting. Once you are in the meeting, we will give you the directions needed to connect to audio.

- + Join from an e-mail invitation
- + What to Expect and How to Handle the First-Time Console Install
- + Join an InterCall Reservationless-Plus audio conference
- + Find a Meeting Invitation

JOIN A MEETING FROM AN E-MAIL INVITATION



Please click the meeting link below to meet me now in my Personal Place:

Start time: Tue 3/22/2005 5:32 PM Eastern Standard Time
 End time: Tue 3/22/2005 6:32 PM Eastern Standard Time
 Audio Information: Dial 888.698.6934 Conference Code: 3790693

[Join the Microsoft Office Live Meeting](#)

If you cannot click the meeting link above, or it does not work, please do the following:

Open your web browser:
 Browse to: <http://www.livemeeting.com/attm/conferenceplace/demos/attend>
 Type your name
 Type the Meeting ID as: 776753
 Type the Password as: 761665

Thanks!

Typically you will join a Conference Place session from an e-mail invitation that you receive in your mail client Inbox. The invitation may be for a scheduled meeting or for an informal Meet Now meeting (where a co-worker has just sent you and invitation to meet in their virtual workspace). The e-mail invitation contains the information that you need to get into the meeting and to connect to the audio portion of the meeting.

TO JOIN A CONFERENCE PLACE SESSION FROM AN E-MAIL INVITATION:

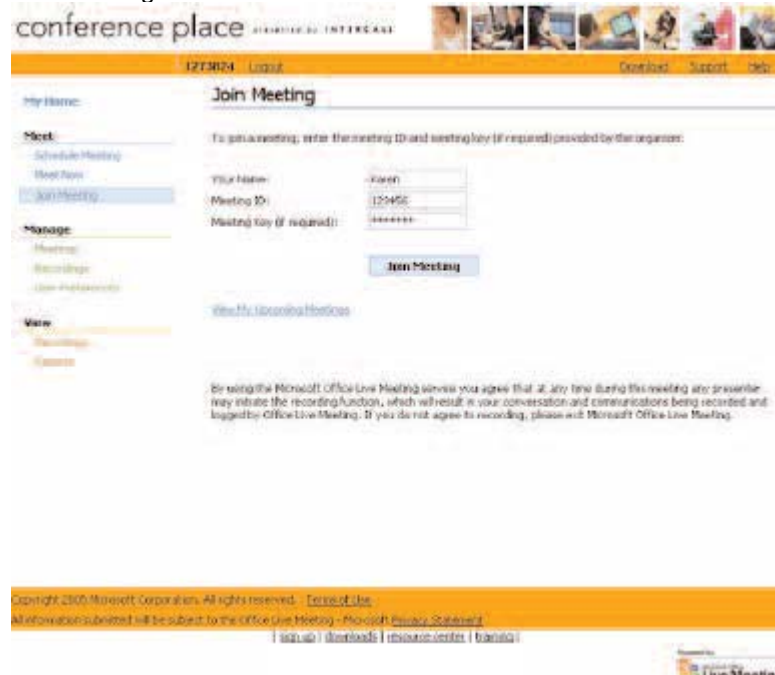
- 1 In the e-mail invitation, click the Join Meeting link to go to the Conference Place Join Meeting page.
- 2 On the Join Meeting page, you will probably be required to enter Your Name, the Meeting ID, and the Meeting Key as specified by the meeting organizer. The Meeting ID and the Meeting Key are contained in the e-mail invitation you received for the meeting. Your Name is the display name that appears in the Conference Place console and identifies you in the meeting. The Meeting ID identifies the meeting, and the Meeting Key provides password protection for the meeting.
- 3 On the Join Meeting page, enter the following:

JOIN MEETING PAGE FIELD	DESCRIPTION AND HOW TO FIND AND ENTER THE INFORMATION
Your Name	This is a friendly name that identifies you to other meeting members. Your Name can be your full name, your first name, your e-mail alias, or however you want to be identified in the meeting. Because this information is not in the meeting invitation, type the name you want into the Your Name box.
Meeting ID	The Meeting ID is contained in your e-mail invitation. Copy the Meeting ID from the e-mail invitation and paste it into the Meeting ID field on the Join Meeting page.

Meeting Key

The Meeting Key information is supplied as the Attendee Key or the Presenter Key information in the e-mail invitation, depending on whether you were invited to the meeting as an Attendee or a Presenter. From the e-mail invitation, copy the Attendee Key or Presenter Key (depending on your invitation), and paste the key into the Meeting Key box.

After you have entered the required information in the Join Meeting page text boxes, click Join Meeting.



WHAT TO EXPECT AND HOW TO HANDLE THE FIRST-TIME CONSOLE INSTALLATION

There are a variety of ways to join a meeting. The way you join a meeting depends on the access controls that the meeting organizer sets for the meeting. If the organizer has set the meeting up so that anybody can attend without a meeting ID or Meeting key, then you can enter the meeting by simply clicking Join.

IF YOU HAVEN'T INSTALLED THE CONFERENCE PLACE CONSOLE (OR HAVE A CONSOLE THAT IS OUT-OF DATE)

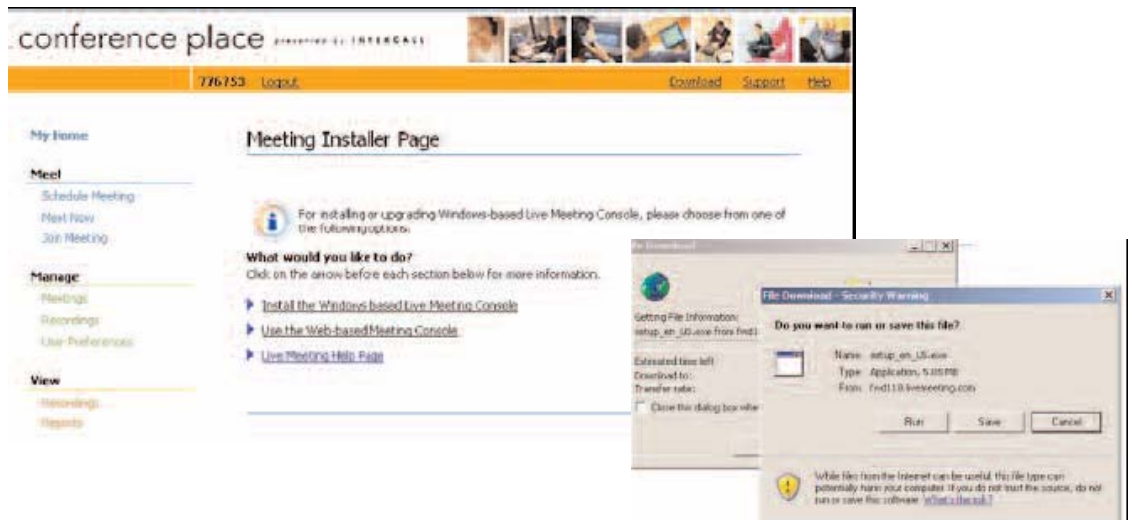
If you try to join a meeting, but haven't installed the Conference Place console or have a console that is out of date, you will see the Meeting Installer page.

INSTALLING THE WINDOWS-BASED CONFERENCE PLACE CONSOLE

If you are running on a Windows platform, we recommend that you click Install the Windows-based Conference Place Console. This is a one-time install that will set up the full-featured Conference Place Windows-based console on your PC.

TO INSTALL THE WINDOWS-BASED CONFERENCE PLACE CONSOLE

- 1 On the Meeting Installer page, click the Install the Windows-based Conference Place Console link.
- 2 On the File Download dialog box, click Run. If you are running Windows XP SP2, you may notice that nothing happens. If this is the case, go back to the Meeting Installer page and look for the popup that says "To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for options."
- 3 Click this pop-up and then click Download File. When you see the File Download dialog box, click Run. Click Run again in the Internet Explorer Security Warning dialog box to start the Conference Place setup. When the installation is complete, Conference Place will launch the console and place you into the meeting.



IF ACTIVEX SETTINGS ARE LOCKED DOWN

The Conference Place console does not require that your ActiveX settings are enabled to install or run. However, if you have Download Signed ActiveX controls and/or Initialize and Script ActiveX controls marked as Safe disabled, you will see an interim Meeting Entry page. At the Meeting Entry page, click the Join Conference Place link.

JOINING THE INTERCALL AUDIO CONFERENCE

Conference Place meetings will include a phone conference in addition to the content that is being displayed or shared in the web meeting console. With Conference Place, you can:

- + Join the conference manually by calling the conference call number provided in your e-mail invitation.
- + If integrated audio is set up, you can have Conference Place call you and automatically join the phone conference.

JOINING AN INTERCALL AUDIO CONFERENCE BY CALLING THE CONFERENCE CALL NUMBER

If the meeting organizer has set up a phone conference for the meeting, the phone conference information, including the conference call number and the participant passcode, are included in the meeting invitation. Conference Place displays the Conference Call information by default.

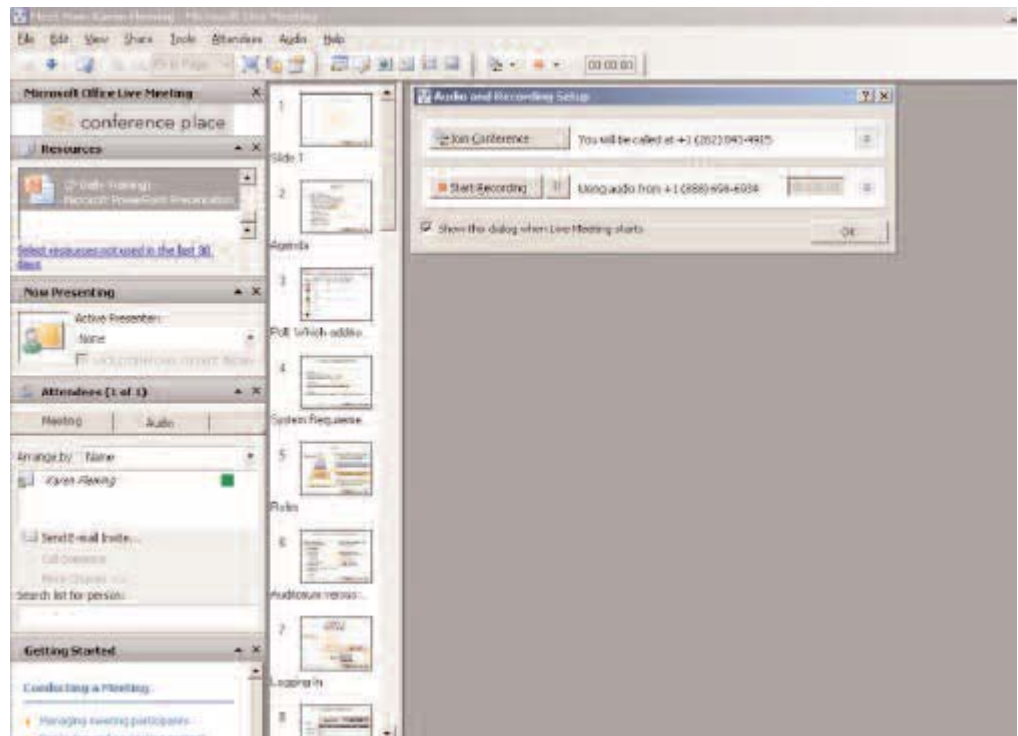
TO JOIN A CONFERENCE CALL

Using your phone, call the Audio Conferencing number provided in the Conference Place e-mail invitation, and then supply the conference code when prompted.

If you are already in the meeting, the following pop-up window will provide you with the audio conference information. Using your phone, call the dial-in number and supply the participant passcode when prompted.

JOINING A PHONE CONFERENCE BY HAVING CONFERENCE PLACE CALL YOU

If integrated audio is set up for the meeting, you should see the following dialog when you first enter the meeting. If this is the case, enter your phone number in the dialog box. Conference Place will then call you and automatically join you to the phone conference. The advantage of this method is that you don't have to remember conference call numbers or passcodes -- supply your phone number and Conference Place does the rest.



TO HAVE CONFERENCE PLACE CALL YOU AND JOIN YOU TO THE CONFERENCE CALL:

- 1 Join the meeting using the steps described earlier in this topic.
- 2 In the Audio and Recording Setup dialog box, in the Call me at text box, enter your phone number (or the number you want the service to call you at.)
- 3 Click Join Conference. The Conference Place integrated audio will call the phone number you specified. When you pick up the phone, the Conference Calling service will have already added you to the Conference Call. The service will ask your name so it can announce your arrival to the meeting.

WHAT TO DO IF YOU EXPERIENCE PROBLEMS JOINING THE CONFERENCE CALL

In some cases, you will experience problems connecting to a conference call, perhaps because a wrong number is supplied in the invitation or because the information is simply missing. A good way to resolve conference call problems at meeting time is to join the meeting and then use the Chat feature in the Conference Place Console to communicate with the meeting organizer.

How to Get Started Quickly

Meet Now meetings are a useful alternative to traditional scheduled Conference Place sessions. With Meet Now, you create a "virtual office" to which you can invite meeting participants at a moment's notice, for example, to present information, to collaborate on documents, or to share an application from your computer.

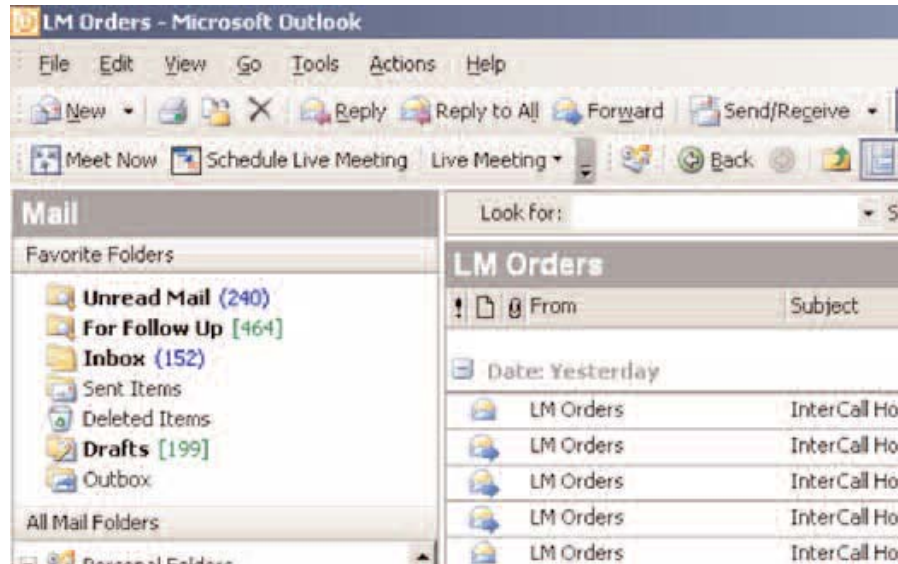
You can start a Meet Now meeting from Microsoft Office Outlook, if you have installed the Microsoft Office Live Meeting Add-in for Outlook, or by using the Conference Place Meeting Manager.

STARTING A MEET NOW MEETING

Before you start using Meet Now, make sure that your Conference Place account and your Meet Now options are set up. For more information about setting up Conference Place, see [How To Set Up Conference Place](#). For more information about Meet Now options, see [How to Set Meeting Options](#).

Start a Meet Now meeting by using Outlook

- 1 On the Conference Place Add-in toolbar in Outlook, click Meet Now. Conference Place creates an e-mail invitation that you can send to the meeting participants.
- 2 In the To box, type your full e-mail address (for example, somebody@microsoft.com).
- 3 Click Send to send the invitation. Conference Place will display the Meeting Entry page.
- 4 On the Meeting Entry page, type your name in the field provided, and then click Join Meeting.
- 5 Conference Place displays the Conference Place Console. You are now ready to conduct the meeting.



The meeting is now started, but you are the only participant. You will invite other attendees later.

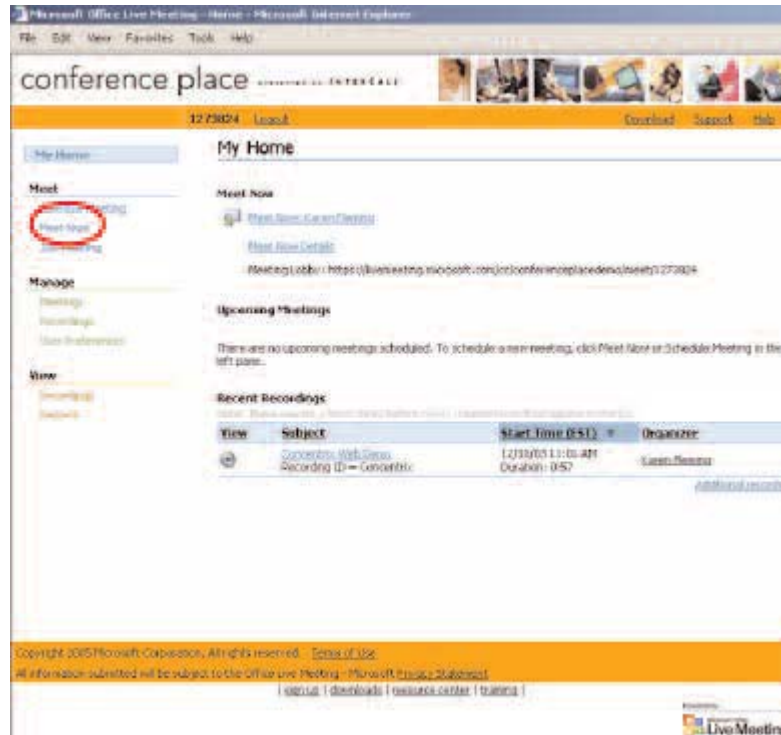
TO START A MEET NOW MEETING BY USING THE CONFERENCE PLACE MANAGER

- 1 In your Internet Browser, enter the URL of your Conference Place Conference Center. If you do not know the URL of your conference center, contact your Conference Place Account Administrator.
- 2 From the Login to Conference Place Manager page, type your User ID in the User Login field, and then type your password in the Password field. If you do not know your User ID and password, contact your Conference Place Account administrator.
- 3 From the My Home page, in the Meet section, click Meet Now.

WHAT TO EXPECT WHEN YOU START A MEET NOW MEETING

When you click Send in the Outlook add-in or you click Meet Now in the Conference Place Manager, Conference Place will determine if you have the Conference Place console and, in so, if it is up to date. If you already have an up-to-date version of the Conference Place console installed, Conference Place will start the console for you. If you do not have the console already installed, or if Conference Place finds a version that is out-of-date, it will display the Meeting Installer page.

If you see this page, click Install the Windows-based Conference Place Console, and then click Run. When the installation is finished, Conference Place will attempt to start the meeting console. If the console does not start automatically, follow the instructions on the Meeting Entry page to start the console and enter your Meet Now meeting. The meeting is now started, but you are the only participant. You will invite other attendees later.



PHONE CONFERENCING

After the Conference Place console has started, start the phone conferencing for the meeting. By default, Conference Place displays the phone conferencing information for you. If you do not have a phone conferencing account, contact your Conference Place administrator.

To start phone conferencing

- + Using your telephone, dial the phone conferencing number. When you are connected to your phone conferencing number, enter your participant code. When you are prompted, enter your leader code.

For more information, see [How to Join a Conference Place](#).

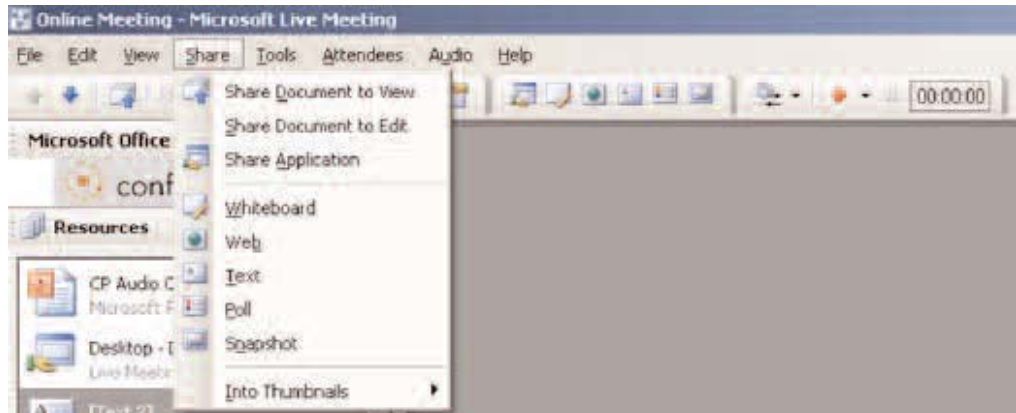
SHARE A DOCUMENT IN THE CONFERENCE PLACE CONSOLE

With Conference Place, you can share Microsoft Office documents and any other printable documents in the meeting console for presentation and collaboration. As an example, the following procedure explains how to share an Office document, but the procedure for any printable document is the same. For more information about sharing documents, see [How to Import and Share Content](#).

To share a document in the Meeting Console

- 1 On the Online Meeting Share menu, click [Share to View](#).
- 2 In the [Choose a Document to Share](#) dialog box, choose a Microsoft Office file that you want to share (for example, a Microsoft Word document).
- 3 Double-click the file name, and then click [Continue](#). Conference Place converts the file to Microsoft Office Document Image (MODI) format and then adds it to the Conference Place console.

- 4 To display the document, in the Resources pane on the left-hand side of the console, click the document that you want to share. If the document contains multiple parts (for example, if a PowerPoint presentation contains more than one slide), each part is displayed in the Thumbnails pane.



Now that the document is loaded and the phone conferencing is set up, you are ready to invite participants to your meeting.

INVITE OTHER PARTICIPANTS

Beginning with Conference Place 2005, you can invite participants from within the Online Meeting console. So you can see how meeting invitations work, in this example you will invite yourself, but the procedure for inviting others is the same.

To send a meeting invitation from within the Online Meeting console

- 1 From the Attendees menu in the Meeting Console, click Send E-Mail Invite.
- 2 In the Attendee text box, enter your full e-mail address, for example, someone@example.com.
- 3 In the Subject box, type a subject for the meeting.
- 4 In the Message box, type "Let us meet about the specification" or any other text that you want to send.
- 5 Click Send Message, and then click OK.



Meeting invitations can take several minutes to arrive.

JOIN THE MEETING AS AN ATTENDEE

A meeting invitation indicates whether you are invited as an attendee or as a presenter. In this example, you are invited as an attendee.

To join a Meet Now meeting from an e-mail invitation

- 1 In your e-mail program, open the Meet Now invitation. In the message, click Join Meeting.
- 2 Depending on how your conference center security is configured, you may do one of the following:
 - On the Join Meeting page, enter your name as you want it to be displayed in the meeting, the Meeting ID for the meeting, and either the Presenter or Attendees Key. The key is included in the e-mail invitation.
 - Go directly to the Conference Place console as a meeting participant.
- 3 Once the Conference Place console has started, enter the meeting as an attendee. Joining a meeting as an attendee starts a separate instance of the console on your computer.
- 4 You can now practice sharing documents between the two instances of the meeting console that you have started. For more information about sharing documents and other resources, see How To Conduct a Meeting.

How to End a Meeting

Once a meeting is finished, there are things you can do to help you stay organized and to get the most value from the meeting. Use the following checklist to make sure you have considered all of your post-meeting options.

POST-MEETING CHECKLIST

Was the meeting recorded?

If so, you may want to:

- + Publish the recording.
- + Verify the published recording location.
- + Play the recording.
- + Invite others to play the recording.
- + Delete the recording.

For more information, see [How To Record a Meeting](#).

Did the meeting include any resources that you want to save?

If so, you may want to:

- + Retain meeting content for a few extra days so participants can review it.
- + Print the meeting content to a PDF file.

For more information, see [How To Import and Share Content](#) and [How To Set Meeting Options](#).

Did you generate a question log for the meeting?

If so, you may want to:

- + Reuse the meeting invitation and meeting ID so that all content is retained.
- + Upload all content to your Meet Now session so that you can invite others whenever you want.
- + Generate a question log.
- + Print the question log.

For more information, see [How To Conduct a Meeting](#).

Do you need to schedule a follow-up meeting with the same attendees?

If so, you may want to:

- + Reuse the meeting invitation and meeting ID so that all content is retained.
- + Upload all content to your Meet Now session so that you can invite others whenever you want.

For more information, see [How To Schedule a Conference Place](#) and [How To Import and Share Content](#).

END A MEETING

As an organizer, you can exit a meeting in one of two ways:

- + Leave the meeting, but allow other participants to continue.
- + Leave the meeting, and end the meeting for all participants.

To leave a meeting you have organized but allow others to continue

- + On the File menu, click Exit.

NOTE: Exiting and Ending the session, will also terminate the audio conference. If you want the audio to continue, please do the following: Leave web session open until audio discussion has concluded. If you must leave the web session running, have a co-presenter end the session so you are not billed for unused minutes. The “please close the door when you leave” concept.

To leave a meeting and end the meeting for all participants

- + On the File menu, click Exit and End Session.