

InterCall Online User Guide

Scheduling Operator Assisted Meetings



For more information:
877.333.2666
www.intercall.ca

By using InterCall Online, you can reserve conferences on the web rather than calling our reservations team. This tool interacts directly with our conferencing provisioning system to register your call preferences and to schedule operator resources for your conference calls when needed.

After logging in, you will be taken to your individual Home page. Your Home page is where you'll find a summary of all the available features and tools that are set up in your owner profile. If it is selected by your company, this page may include your company's own branding, as well as special announcements regarding new services and features.

Scheduling a Meeting

You can schedule a meeting directly from your Home page or by selecting **My Meetings**.

The screenshot shows the InterCall Online user interface. On the left is a navigation menu with links: Home, My Meetings (circled in red), My Library, Manage Your Account, Reports, View Invoices, and Customer Support. The main content area has a 'Welcome to InterCall Online' message with a user profile picture. Below this is a 'Join A Meeting As A Participant' section with a text input field for a conference code and a 'Join' button. The 'Today's Upcoming Meetings' section features a 'Schedule A Meeting' button (circled in red) and a 'Start Instant Meeting' dropdown menu. Below these sections is a table with columns: R, Date/Time, Topic, Leader Name, Owner, Conf ID, Meeting N..., and Duration.

- 1 Click **Schedule A Meeting** from either location. Click **Operator Assisted** in the Audio Options section. Then click **Continue**.
- 2 Complete the **Meeting Information** section.

Meeting Information

MEETING DETAILS


To add additional conference numbers, please call 800-374-2441

** - Required Fields*


** Please select from the following Conference Numbers for this reservations*


Operator Assisted Toll Free Dial-In Number (800) 992-4048

Operator Assisted Toll Free Dial-In Number (800) 309-2899


** Date* 


** Time*

** Time Zone* 

** Duration* Hours Minutes 

End Time N/A

** participants* 

Topic 

PAC CODE

PAC Code

SCHEDULER/ CALL ORGANIZER

Same as Owner's address

** First Name*

- Select your **Dial-in Numbers**.
 - Select the **Date** for your meeting by clicking the calendar icon.
 - Select a **Time** for your meeting.
 - Select the **Time Zone** for your meeting from the drop down menu. The time zone will default to what is saved on your owner profile.
 - Specify the **Duration** of your meeting in hours and minutes.
 - Specify the **Number of Participants** for your meeting.
 - While not required, it is helpful to include a **Conference Topic** to distinguish this meeting from others.
- 3 Provide a **PAC Code** if needed. PAC Codes, or Project Accounting Codes, provide a method to identify conference calls. These PAC Codes are individual accounting codes that may be used to bill the appropriate department/cost center or just to track departmental conference calls. The label preceding this field can be customized to show the verbiage that your company uses for this purpose.
 - 4 If you are the scheduler/call organizer for this meeting, simply choose **Same as Owner** and provide any additional required information that does not pre-populate.

If you are scheduling this call on the behalf of someone else, provide your information in this area so a conference coordinator has a point of contact should there be any questions.

- 5 If you are the leader for this meeting, simply choose **Same as Owner's address** and provide any additional required information that does not pre-populate.

If you are not the meeting leader, provide the required information in this area.

- 6 Select the **Standard Features** for the call.
 - Participants can either be placed on hold with music until you join the conference (Music Hold) or they can be placed directly into the call by an operator (Direct Entry).
 - You have the option to join before participants enter your meeting (Leader First) or after all participants have been placed into the meeting (Leader Last).
 - Choose to have a tone sounded into the conference when participants enter and/or exit the meeting (Entry Tone/Exit Tone).
 - Instruct the operator to announce participants' names as they are joined to the call (Name Announce) or the operator recites the names of participants who are in the conference (Roll Call).
- 7 If not already pre-populated, provide an email address for email confirmation details for your meeting. If you want the email confirmation sent to multiple email addresses, enter them in the email field separated by a comma. You may also choose an optional fax confirmation or dial-out confirmation.
- 8 If you want to make any optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** here or from any of the optional feature tabs to reserve your call.

Optional Meeting Features

There are many optional meeting features that can also be chosen using InterCall Online. These features include Participant Lists, Recurring Options, Pre-Meeting Features, Enhanced Features and Recording Features.

PARTICIPANT LIST

Participant List is a commonly used security feature that ensures only invited participants are allowed into the conference by the conference operator. You can choose to have the conference operator dial out to the participant or indicate that the participant will be dialing into the call. This feature can also be used to communicate the meeting details to participants.

Participant List

i You can create a list of participants to attend your meeting. Select a stores list or add new contacts below.

IDENTIFY PARTICIPANT LIST

View participant in the distribution list: Monday

Select Name	Telephone	Email
Brad Pitt		
M Marples	01452 581000	testdoc@intercall.com
P G Tipps		

[Add Selected Participants to Meeting](#)

Confirm Participant List

Approved Participant List - Check the box to **ONLY** allow entry for the participants listed above.

[Add Participant](#)

First Name	Last Name	Leader	Telephone	Country	Send Confirm	Call Type	Dial-Out Time	Call Order
Alison	Templeton	<input checked="" type="checkbox"/>	01452581004	United Kingd...		Dial In		0

1 Set the parameters for your Participant List.

- In the Identify Participant List section, select participants from a stored list (set up within the My Library/My Address Book) by highlighting their names and clicking **Add Selected Participants to Meeting**. Your screen will refresh with this addition.
- To add new participants to a list, click **Add Participant** and scroll down the page and complete the table with their details and click **Save Participant**.

First Name	<input type="text"/>
Last Name	<input type="text"/>
Leader	<input type="checkbox"/>
Country	Afghanistan
Telephone	<input type="text"/>
Call Type	Dial In
Dial-Out Time (HH:MM)	<input type="text"/> AM
Call Order	<input type="text"/>
<input type="checkbox"/> Send Confirm	<input type="text"/>

[Save Participant](#)

The screen will refresh to show a list of participants for your call. Repeat as necessary to add more participants.

2 If you want to make any additional optional meeting feature selections, click **Next. Otherwise, you may click **Submit** to reserve your call.**

RECURRING OPTIONS

If the meeting you are scheduling is a recurring meeting, the Recurring Options tab allows you to select the frequency of the meetings: daily, weekly or monthly and for how long you would like the recurring meeting to be scheduled in advance.

Recurring Options

Select the recurring options for your call from the options listed below.

I WOULD LIKE FOR THIS TO BE A RECURRING CALL

1. How frequently do you want to hold this conference call?

Schedule this call to occur Daily Weekly Monthly

- Every Business Day (Monday - Friday)
- Every Day of the Week

2. When do you want this series of conference calls to end?

- Never, keep scheduling this call indefinitely
- End this series of conference calls after the following number of occurrences
- End this series of conference calls after

3. Depending on the options chosen above, one or more conference calls may fall on a Saturday or Sunday. If so, how do you want to handle it?

- Reschedule the call for the following Monday
- Reschedule the call for the prior Friday
- Keep the call as scheduled
- Cancel the call.

Preview Conference Dates

- 1 Check the box indicating you would like for this to be a recurring call.
- 2 Determine the frequency of the call: **Daily**, **Weekly** or **Monthly**. Your screen will refresh based on your selection and provide options for you to further define the frequency of your call.
- 3 Determine when you want the series of conference calls to end. You may schedule the meeting indefinitely, end after a number of occurrences or end on a certain date.
- 4 Determine any changes you may want made if the call should fall on weekend.
- 5 Click **Preview Conference Dates** for a summary of your recurring call. Your screen will refresh and the preview will appear at the bottom of the screen.
- 6 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

PRE-MEETING FEATURES

InterCall Online offers a set of pre-meeting features that give you additional flexibility in how to communicate to participants prior to your conference. Additional charges may apply to many of these features. Please check with your company administrator or account manager for details.

Registration Options

Manage your large conferences and keep track of participants. You decide what information you would like to gather from each registrant and choose from handy options such as email reminders and custom-scripted messages. With both phone and web access to choose from, you can construct an event registration program that best suits your needs.

REGISTRATION

Type

Number of Registrants

Registration ID Required

* Contact Name

* Contact Phone

- 1 Check the box indicating you would like to add Registration to your meeting.
- 2 Click the drop down box to select from the following Registration Options:
 - **Phone Registration** – Participants register for your meeting by dialing into a branded toll-free number and leaving an RSVP for your meeting according to the parameters you define.
 - **Web Registration for Single Event** – Participants register for your meeting by visiting an Event Registration web site branded especially for you.
 - **Web Registration for Multiple Events** – Participants register for multiple events by visiting an Event Registration web site branded especially for you.
 - **Phone and Web Registration for Single Event** – Participants register for your meeting by dialing into a branded toll-free number or by visiting an Event Registration web site branded especially for you.
 - **Phone and Web Registration for Multiple Events** – Participants register for multiple events by dialing into a branded toll-free number or by visiting an Event Registration web site branded especially for you.
- 3 Provide the **Number of Registrants** you want to have access to your phone and/or web registration.
- 4 Check the **Registration ID Required** box if you would like this option.
- 5 Provide a **Contact Name** and **Contact Phone** number.
- 6 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

Broadcast Services

Send pre- or post-event documents or messages to all your guests simultaneously.

BROADCASTING

Email Fax Voice

* BroadCast Date

* Contact Name

* Contact Phone Ext.

* Email

- 1 Check the box indicating you would like to add **Broadcasting** to your meeting.

- 2 Select one or more of the delivery methods to send documents or messages:
 - **Email** – Supports text and HTML files.
 - **Fax** – Supports paper copy or electronic files (MS Word or Adobe file formats).
 - **Voice** – Supports audio messages up to 45 seconds in duration.
- 3 Click the calendar icon to select your Broadcast Date.
- 4 Provide or edit **Contact Name**, **Contact Phone** and **Email**. (These will automatically pre-populate with your details but are editable.)
- 5 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

Voice Broadcast services are free; however, additional charges may be applied for Email and Fax Broadcast services. Please check with your company administrator for details.

Special Enunciator

You may have your participants greeted with a branded recording when they dial in for your conference call. For example, "Welcome to the designated conferencing provider for ABC Company. A conference coordinator will be with you shortly."

- 1 Check the box indicating you would like to add a **Special Enunciator** to your meeting.
- 2 Provide your script where indicated.
- 3 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

Special Script

Craft a special message for a welcome statement, Q&A session and/or closing comments. Your script is read by the operator during your meeting, adding another way to personalize your call.

- 1 Check the box indicating you would like to add **Special Script** to your meeting.
- 2 Provide your special script where indicated.
- 3 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

Promotional Playback

Provide a promotional message or announcement for your participants to listen to while they wait for your meeting to begin.

- 1 Check the box indicating you would like to add **Promotional Tape/Playback** to your meeting.
- 2 From the drop down menu, select the format for which the message or announcement will be provided: CD, cassette, EncoreSM, micro cassette or DAT.

- 3 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

ENHANCED FEATURES

A complete range of enhancements are available to make the most of your event, and your conference will be more professional, interactive and engaging. It's easy to customize your conference with one or more of the enhanced features listed below. Additional charges apply to many of these features. Please check with your company administrator or account manager for details.

Polling

Determine questions prior to your meeting and have participants respond using their telephone keypads. Polling allows you to collect instant feedback and increases participant involvement in the call. You will receive a report with all the responses organized by question and participant.

POLLING

Who will be conducting this poll ? Polling by Operator Polling by Leader

* Recipient Name

* Polling Result Recipient Email

* Polling Result RecipientFax

QUESTIONS	ANSWERS
<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>	1. <input type="text"/>
	2. <input type="text"/>
	3. <input type="text"/>
	4. <input type="text"/>
	5. <input type="text"/>
	6. <input type="text"/>
	7. <input type="text"/>
	8. <input type="text"/>
	9. <input type="text"/>
	10. <input type="text"/>

<<< 1 Of 1 >>>
Add Question Delete Question

- 1 Check the box indicating you would like to add **Polling** to your meeting.
- 2 Determine who will conduct the poll.
- 3 Identify who will receive Polling results and provide **Recipient Name, Email** and/or **Fax** number.
- 4 In the specified areas, provide your question and up to 10 possible answers. Click **Add Question**. The screen will refresh, and you may add more questions or delete any you have already submitted.
- 5 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.



Participant Report and Click to Event

Collect information about your participants as they join your conference. The information will be sent to you by fax or email along with the on-the-line times for each participant.

PARTICIPANT REPORT INCLUDE CLICK TO EVENT LINK

Which Participant Report Option would you like? Participant Report (Standard) Participant Report (Enhanced) Participant Report (Premium)

Requested Information:

1.

2.

PARTICIPANT REPORT RECIPIENTS Add Recipient

Recipient Name	Email	Fax
Alison Templeton		

Remove

Recipient Name:

Email: ⓘ

Fax: ⓘ

Save Recipient

- 1 Check the box indicating you would like to add **Participant Report** to your meeting.
- 2 Select which **Participant Report Option** you would like:
 - **Standard** – Requests the participant's first and last name.
 - **Enhanced** – Requests the participant's first and last name, phone number and two additional pieces of information of your choice. If selected, add the additional requested information you desire to fields 3 and 4.
 - **Premium** – Requests the participant's first and last name, phone number and four additional pieces of information of your choice. If selected, add the additional requested information you desire to fields 3 through 6.
- 3 Indicate who you would like the Participant Report delivered to and provide **Recipient Name, Email** and/or **Fax** number. Click **Add Recipient**. Your screen will refresh and you may add more recipients if desired.
- 4 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

Call Transcription

Transcription provides an accurate, verbatim account of a conference in a typewritten format in Microsoft Word.

CALL TRANSCRIPTION

Please be advised that this call is subject to a Call Transcription cancellation fee should the call not take place and if the reservation is not cancelled at least 15 minutes prior to the call start time.

* Which Service Option Would you like ?

Call Transcription Rush (3 Hour Turnaround)
 Call Transcription (24 Hour Turnaround)
 Call Transcription (48 Hour Turnaround)
 Call Transcription Express (12 Hour Turnaround)

* Would you like to have your entire call transcribed or just the Question and Answer session?

Entire Call
 Q&A Session Only

* How would you like your Participant Report delivered?

Email Fax Hard Copy w/Diskette

- 1 Check the box indicating you would like to add **Call Transcription** to your meeting.
- 2 Select your preferred **Service Option**: 3, 12, 24 or 48 hour turnaround.
- 3 Determine whether you would like your **Entire Call** transcribed or the **Q&A Session Only**.
- 4 Select how you would like your transcription delivered: **Email, Fax or Hard Copy w/Diskette**.
- 5 Provide the requested contact information. Click **Add Recipient**. Your screen will refresh and if you choose to do so, you may add more recipients or delete recipients you've already submitted.
- 6 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

Additional Enhanced Features

Choose from the following Additional Enhanced Features to make your meeting experience even more productive.

ADDITIONAL ENHANCED FEATURES

I would like to add a Communication Line to this call.

Leader View

Lecture

Voice Talent

Question & Answer

Call Monitor

Password

Record/Playback Conference ID

- + **Communication Line** – Speak with an operator outside the main conference to convey behind-the-scenes information, orchestrate guest speakers or give timing cues. A Communication Line makes it easier to manage a large conference.



- + **Leader-ViewSM** – View participant information and Q&A queue lists via the Internet. With this secure, real-time tool, you'll be able to see when key guests arrive and who's in queue to ask questions.
- + **Lecture Mode** – All guests' lines are muted during the presentation to reduce background noise, allowing you to deliver your message uninterrupted.
- + **Voice Talent** – Use screened and trained operators to provide voice-over quality talent, lending a professional touch to high-profile conferences. English and Spanish speaking operators are available.
- + **Question & Answer** – Give your participants the opportunity to ask questions during the conference. Participants indicate they have a question using their telephone keypads, while the operator manages the question queue in a professional and orderly fashion.
- + **Call Monitor** – Have your conference call monitored for clarity, but not content, ensuring that your participants will experience the highest level of quality.
- + **Password** – Require participants to provide the operator with a pre-determined word or code to join the conference. Password protection restricts attendance and heightens security.
- + **Record/Playback** – Replay a previously recorded conference or message at one or more scheduled times. The recorded conference or message can be provided in the following formats: CD, cassette, Encore, micro cassette or DAT.

If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

RECORDING FEATURES

Record your conference call for participants who were unable to attend your meeting or those who would like to listen again. Additional charges apply to many of these features. Please check with your company administrator or account manager for details.

Encore

Encore digitally records your call for those who were unable to attend it live or would like to listen again. Accessible by dialing a toll-free number for easy 24/7 access, Encore is convenient and time saving.

Recording Features

i Select the recording options for your call from the features listed below

ENCORE

* Start Date

* Start Time(HH:MM)

Encore Security Code

Playback Prompts

* End Date

* End Time(HH:MM)

Enter information that you would like for callers to record when they call in to listen to the playback. Each item in the list will be recorded as a separate prompt (EX. After the tone, please state and spell your full name.)

Before Playback Prompt

After Playback Prompt

- 1 Check the box indicating you would like to add **Encore** to your meeting.
- 2 Click on the calendar icons to select a **Start Date** and an **End Date** for your Encore digital recording to be available.
- 3 Provide a **Start Time** and **End Time** for your Encore digital recording to be available.
- 4 If desired, select the **Security Password** option and provide the password you would like in the specified area.
- 5 If you have **Before Playback Prompt** information you would like to capture about your caller, type it into the relevant box on the screen and click **Add**. Prompts might include "Please state and spell your full name," or "Please provide your email address." Your screen will refresh with each prompt you add and be displayed in the larger box in the middle of the screen. At this point, you can change the order of the prompts by highlighting a prompt and clicking **Move Up** or **Move Down**. You may also highlight a prompt and click **Remove** if you no longer want the prompt to be included.
- 6 **After Playback Prompt** functionality is the same as Before Playback Prompt.

Tape Recording

Have your conference call recorded and sent to you in one of our multiple CD options or on cassette.

T A P E R E C O R D I N G								
Recording Type	Mail Qty	Media Shippin...	Ship To	Country	Address 1	Address 2	City	Sta
CD - CDA	0	Domestic - St...	Alison Temple...	United Kingdom	Topeka House	Luther Challis Busi...	Barnwood, Glo...	

Remove

- * Recording Type:
- * Mail Qty:
- * Media Shipping Method:
- * Ship To:
- * Address 1:
- * Address 2:
- * Country:
- * City:
- * State/Province:
- * ZIP/Postal Code:

- 1 Check the box indicating you would like to order a copy of your Encore recording.
- 2 Select your **Recording Type** from: CD-Indexed, CD-MP3, CD-WAV, CD-CDA or Cassette.
- 3 Designate the **Quantity** for recordings you would like to receive.
- 4 Select your **Media Shipping Method** from Domestic Standard, Domestic Overnight, International Standard or International Overnight.
- 5 Provide the **Ship To** recipient, **Address**, **City**, **State/Province**, **ZIP/Postal Code** and **Country** for whom the Encore recordings are to be delivered. Click **Add Recipient**. Your screen will refresh and you may designate additional recipients or delete recipients who have already been submitted.
- 6 If you want to make any additional optional meeting feature selections or changes, click **Previous**. Otherwise, you may click **Submit** to reserve your call.
- 7 A confirmation message will appear on your screen stating your call has been scheduled along with your conference ID. From here you will have the ability to download your conference directly into your calendar by selecting one of the calendar options shown.