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ICEF Workshops

The Australia New Zealand Agent Workshop
www.anzaworkshop.com

Getting Started information for the eSchedule PRO

Important

This version of the eSchedule PRO has been customised for the ICEF Workshops. The eSchedule PRO appointment scheduling system is provided to all participants at no additional cost. It should be used to schedule all appointments. Appointments made outside of the system will not be recorded and may result in conflicting meetings.

Overview

The eSchedule PRO is a centralised web-based appointment scheduling system which facilitates the appointment booking process between participants prior to the event.
The system is extremely user-friendly as it follows a traditional approach:

- You view/search/filter the list of participants and send appointment requests to those who you want to meet
- Contacted participants receive an email and your name is added to their list of appointment requests received
- When a participant schedules a meeting with you, you receive an email and your online schedule is updated
- You will also receive appointment requests from other participants interested in meeting with you
- You schedule meetings with participants you are interested in meeting and decline other requests
- Prior to the event, you can export your schedule to PDF, print it and take it to the workshop

The top menu bar includes easy-to-use tabs to navigate between the following sections :

[My Schedule]

View/cancel existing appointments, reschedule appointments, block/unblock timeslots, indicate whether you will attend social events, add comments, view who initiated the meeting, print your schedule.
If you share a table with a colleague you can also view your colleague's schedule, join meetings, transfer meetings between colleagues, add comments to your colleague's schedule.

[Requests Received]

List of appointment requests received from other participants (listed by category)
If you share a table with a colleague: View all appointment requests received by your colleague and even schedule meetings with participants who have contacted your colleague.

[Educators] - [Agents] - [Exhibitors]

List of representatives classified by organisations with filter and search options. Send & resend appointment requests to participants, view the status of all completed actions.
If you share a table with a colleague: View the status of all actions completed by your colleague.

[Seminars / Sessions]

View the list of pre-event sessions and select those you want to attend.

[Message Centre]

Read messages posted by the eSchedule PRO Administrator or the Event Organiser.

[Edit Profile]

View/Edit your personal and business account information and change your password.

[Other links]

The "Support"- "Getting Started & FAQ" and "Log out" links are always available above the menu bar on the right.

Review / Edit your profile

Top ▲

Upon your first login, you will be prompted to accept the Terms of Use and then to review your personal and business profile.

You may also make changes to your profile at anytime by clicking on the **[Edit Profile]** tab.

Please note that if you share a table with another representative from the same institution, your eSchedule PRO accounts are linked and your business information is identical on both accounts

Block off timeslots

Top ▲

There are a number of reasons why you may want to block off some timeslots such as: you want to keep some sessions for late bookings, your flight leaves early ...

- Click on the **[My Schedule]** tab in the menu bar
- In the Actions column of your schedule, click on the block timeslot icon -
- Click on „Yes“ when the alert message appears

To unblock a timeslot, follow the reverse process by clicking on the unblock icon -
Your timeslot will then become available for bookings.

Requests Received

Top ▲

You will receive appointment requests from other participants by email. These requests are listed in the **[Requests Received]** *section. Please make sure that you process all requests received either by scheduling a meeting or by declining these requests.*

To view all appointment requests received, click on the **[Requests Received]** tab in the menu bar. Requests are listed by category of participants. Click on the Unanswered Requests link to view pending requests.

You then have two options :

A - You are interested in meeting with this participant: Click on the Schedule meeting icon in the action column to book an appointment.

B - You are not interested in meeting with this participant or unable to do so: Click on the decline icon in the action column to decline this appointment request and add a short message for the sender (optional). You may decline multiple requests at the same time by selecting them and clicking on the “decline all selected requests” link located above the list.

Tips :

Place your cursor on the message icon to view the appointment request message.
Place your cursor on the reminder number to see when this request has been sent / resent.

Contact other Participants

Top ▲

Click on the **[Educators]**, **[Agents]** *or* **[Exhibitors]** *tab in the menu bar to view all organisations currently registered for this event.*

A - Click on the request appointment icon in the actions column of the selected representative. You can then enter a personalised message to request an appointment with this participant.

B - Pre-select some participants by using the checkbox and you click on the “Request an appointment with all selected participants“ link to contact all selected participants at the same time. You will then have the opportunity to add a message to send to all selected participants.

In both cases, you will be asked if you want to save your message template for future use. Your saved message will appear next to the message box the next time you send an appointment request.

Your appointment requests sent can be viewed in the Actions column next to the representative name.
An alert message above the list will inform you if some of your appointment requests have been declined.

New Features

Top ▲

Based on feedback received from past participants, many new features have been added.

While we continue adding new features our motto is and remains “Keep it simple and user-friendly”:

Schedule meetings during non-appointment sessions

You now have the possibility to schedule meetings during non regular appointment sessions (coffee breaks, lunch..). You first need to unblock the corresponding timeslot on your schedule to indicate that you are willing to accept meetings at this time. Other participants whom you have contacted, will then be able to schedule a meeting with you after unblocking the corresponding timeslot on their own schedule.

eSchedule PRO Matching Wizard

As the event date approaches, it becomes more and more difficult to find common available timeslots with other participants. In this case, you will now be prompted to launch the eSchedule PRO Matching Wizard which will analyse both schedules and try to suggest solutions via rescheduling meetings, unblocking timeslots... You can then select the best option and ask the eSchedule PRO to arrange the meeting for you!

If you attend this event with a colleague, you can also ask the eSchedule PRO Matching Wizard to search for a matching timeslot with your colleague.

CO_2 Compensation

In order to encourage sound environmental practices, participants who compensate for their flight CO2 emission or use public transportation to attend the event, can display a green leaf next to their name. This option is activated via the **[Edit Profile]** section of your account.

Advanced Filter Alerts

By clicking on the “Advanced Filters” link above the lists, you can refine your search and specify search criteria. You can now save your filters and activate an alert to be notified by email whenever a new participant matching your criteria is added to the database.

Exporting the lists

You can export the full list of participants or a partial list resulting from a search or filter to PDF or Excel. Exporting to Excel comes with more options as you can select which information you want to export by dragging the corresponding fields from left to right.

Attending Social Events

You can now specify whether you will be attending social events listed on your schedule. Simply click on the corresponding icons in the actions column to confirm your selection.

Seminars / Sessions

Click on this tab to view all pre-event seminars offered to all participants. Make your selection and click on the “Add to My Schedule” icon located in the actions column to sign up. Added sessions will then be displayed on your schedule.

Message Centre

The eSchedule PRO Adminstrator and the event organiser will occasionally post messages for you. Please make sure that you read all your messages as the message centre will only be used for important notifications.

FAQ

Top ▲

Q. Why do I need to use this eSchedule PRO for all my appointment bookings?

A. Because the system compiles appointments for all participants. Appointments not recorded by the system may result in conflicting meetings.

Q. Can I add an appointment to my schedule?

A. You can schedule a meeting only if you (or your colleague) have received an appointment request from another participant. If you schedule a meeting with another participant outside of the eSchedule PRO, please make sure that you follow up with an appointment request so that this meeting is properly recorded.

Q. What happens when I send an appointment request to another participant?

A. The other participant receives an email with your message requesting an appointment and a link to the eSchedule PRO login page where he/she can login. An alert is also posted on the participant's schedule to indicate that a new appointment request has been received. Your name is added to the list of requests received.

Q. When scheduling an appointment with me, do other participants see my schedule of appointments?

A. No, other participants only see when both of you are available so that they can select the most appropriate time.

Q. Is it possible for a participant to book two appointments with two different institutions during the same session?

A. No, double booking is not permitted by the system but you may meet two representatives from another organisation if a second representative decided to join the initial meeting.

Q. Can I resend an appointment request if I don´t get a reply ?

A. You can resend the same appointment request if you have not received a reply after two days. Requests which have been resent are listed on top of the list of appointment requests received. Resent requests are not transmitted by email (unlike the first one).

Q. Can I schedule meetings during break sessions?

A. Yes, when both parties have made non appointment sessions available for appointments on their schedules, a meeting can be arranged during break sessions.

Q. How do I reschedule or cancel an appointment?

A. Click on the **[My Schedule]** *tab and then click on the Reschedule or Cancel icon corresponding to the meeting. If you cancel an appointment, an email will automatically be sent to the other participant to let him/her know of this cancellation. No email is sent to the other participant when you reschedule a meeting.*

Q. How can I transfer an appointment to my colleague

A. In order to transfer one of your meeting to your colleague's schedule, you must first click on the **[My Schedule]** *tab and then click on the Transfer icon in the actions column. You will then have the option to transfer the appointment to the same timeslot (pre-selected and circled in red) if your colleague is available or transfer it to another timeslot when both representatives are available. You can also transfer a meeting from your colleague's schedule to your schedule by following the reverse process..*

Q How can I join a meeting?

A. Click on the **[My Schedule]** *tab and click on the link with the name of your colleague. You will then see all appointments made by your colleague. A Join Meeting icon will appear in the actions column of your colleague's schedule if you are available during this timeslot. If you click on the Join Meeting icon, this meeting is automatically added to your schedule. Your name will also be automatically be added on the schedule of the other party so that he/she is aware that you've joined the meeting.*

Support

Top ▲

If you need assistance with the eSchedule PRO, please click on the "Contact Support" link located above the menu bar to send an email to the eSchedule PRO support team.

All inquiries are answered within one working day.