



BroadData Unified Meeting

Shared Outlook® Calendar Scheduling

The steps below will allow you to schedule meetings for your manager on their Outlook Calendar using their Unified Meeting account.

It is important that both you and your manager have Unified Meeting installed on your computers in order to use shared Outlook Calendars for scheduling meetings. If you have not already downloaded the software, please visit the URL in your Welcome Email.

Scheduling Steps

- 1 Click on the desktop icon  in your system tray.
- 2 Choose **Sign In**
 - a. If you are already signed into your own account, click **Sign Out**.
 - b. Click the icon again, select **Options** and uncheck **Always sign in automatically** and click OK.
 - c. Click **Sign In** again
- 3 Enter your manager's User login and Password (your manager must provide you with this information).
- 4 Access your manager's shared Outlook Calendar (you must have "Owner" rights to your manager's calendar) and double-click the specific meeting time.
- 5 Enter the Subject and click **Unified Meeting** to populate the invitation text in the body of the appointment, which includes your manager's meeting login and dial-in information.
 - a. You may edit the text, but be careful not to delete the meeting access information.
- 6 Invite participants as you normally do and click **Send**.
- 7 Your manager will have the Unified Meeting appointment scheduled in his/her Outlook calendar.
 - a. To start the meeting, your manager will click **Join the meeting** in their calendar.
- 8 It is important that after you schedule the meeting for your manager, you to go back to your desktop icon  in your system tray and click **Sign Out** to exit out of your manager's Unified Meeting account.
- 9 You can now return to your own Unified Meeting account by clicking on the desktop icon and choosing **Sign In**.

