

How To: Schedule Onsite Meetings

Overview

Add a scheduled Onsite Meeting to your Outlook calendar event for Onsite users and guests. The **Onsite Meetings add-in** enables you to:

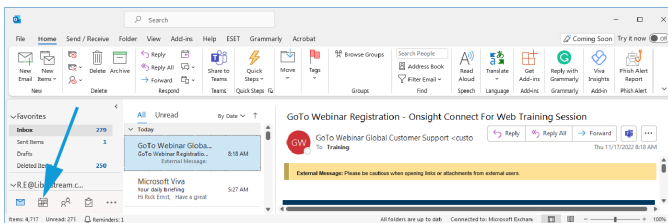
- Schedule Onsite Meetings using Outlook.
- Manage Onsite Meetings within a Outlook calendar.
- Invite guests to participate in Onsite meetings, if enabled for your account.

Scheduling an Onsite Meeting Call

Launch Outlook and login to your account.

Create a new Onsite Meeting.

1. Locate and select the **Calendar**  icon within Outlook.



2. Within the **Ribbon**, click the **New Meeting**  icon in the top-left corner. An **Untitled Meeting** appears.

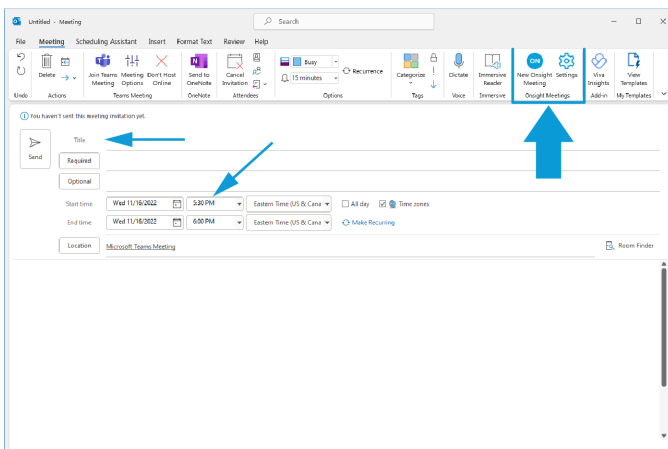





Figure 1. Untitled Meeting

3. Provide typical Outlook meeting details. Consider providing:
 - A **Title**.
 - A **Start** and **End time** for the meeting that is later than the current time.
4. Add one or more **Attendees** from your address book and/or enter email addresses as required.

5. Next, you must login to your **Onsight** account. Choose from one of the following methods:

- Click the **New Onsight Meeting**  icon and enter your login credentials; or
- Click the **Onsight Settings**  icon to access the **Onsight Meetings** side panel and click **Sign In** to continue.

 **Tip:** The **Settings > Side-panel** option provides additional editing capabilities for the invitation.

The **Onsight** login screen appears.

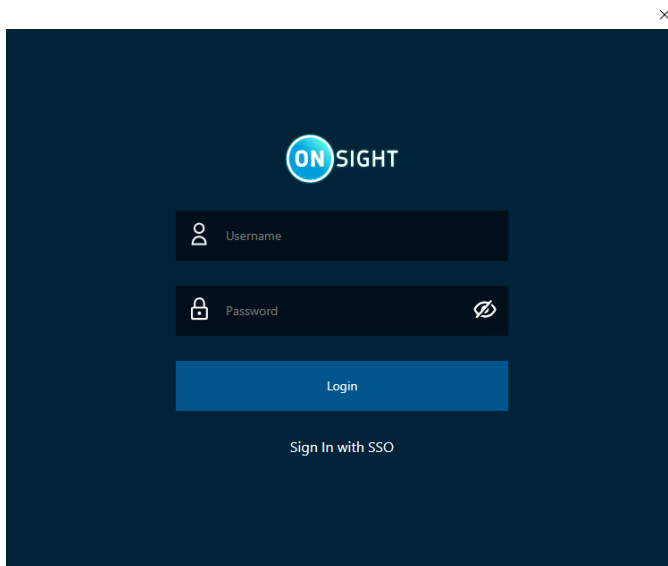



Figure 2. Onsight Login Screen

6. Enter your Onsight credentials and click **Login**. The meeting invitation link is added to the meeting invite **Body** and **Location** sections.

 **Note:**

- a. You can copy and paste the meeting invitation link within a chat, email or other application to share the invite with one or more guests.
- b. For future meeting invites, clicking the **New Onsight Meeting**  icon will only add the meeting link. It will not prompt the **Onsight Login** screen. This screen appear once, and then login credentials are cached.
- c. The **Onsight Meetings** side panel also enables you to **Delete an Onsight Meeting** and specify the **Invitation Language**.

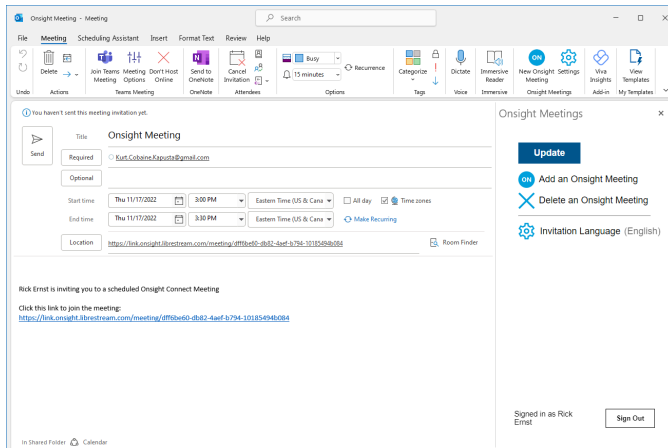


Figure 3. Meeting Link Added to the Invitation Body

7. Click **Send**.



Note: Resolve any conflicts for participants, as required. Conflicts can arise when an email address is shared between multiple Onsight accounts. Select the appropriate attendee and click **OK** to continue.

8. Consider that:

- If the meeting invite wasn't successful, then there will be an error message within the calendar item notification, above the **Title** field. You must correct all errors and click **Send** again.
- If the meeting was successful, invitation text is inserted into the calendar invite as text that includes the link to join the meeting, and the event is added to your calendar.

This completes the procedure.

Joining a Meeting as a Participant or Guest

1. Within Outlook, open the event and click the Onsight Meeting link.

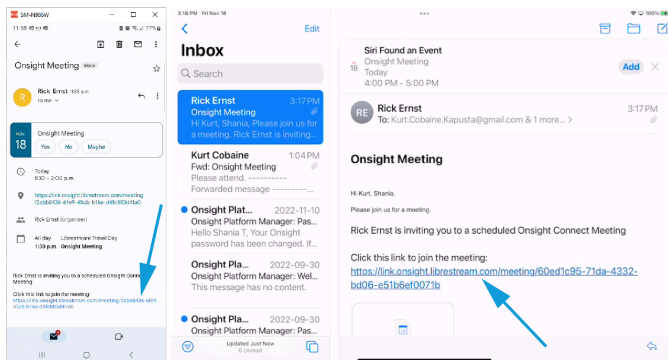


Figure 4. Onsight Meeting Invite on a Smartphone & Tablet

2. The link uses **Deep Linking** to launch:

- **Onsight Connect** (Full Client) application if installed, or
- **Onsight Connect** for Web.

3. A **Login** screen appears. Choose one of the following options:

- Enter a **Username & Password** if you already have an Onsight account and click **Login**; or
- Select the **Join as Guest** button.

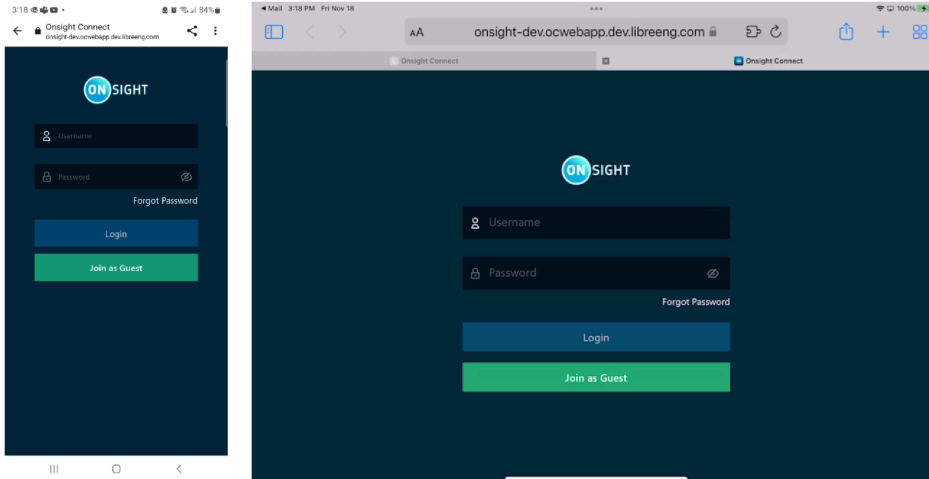


Figure 5. OnSight Meeting Invite

4. Join as Guest Option — Enter a **Guest's Name** and an **Email Address** and click the **Join as Guest** button.

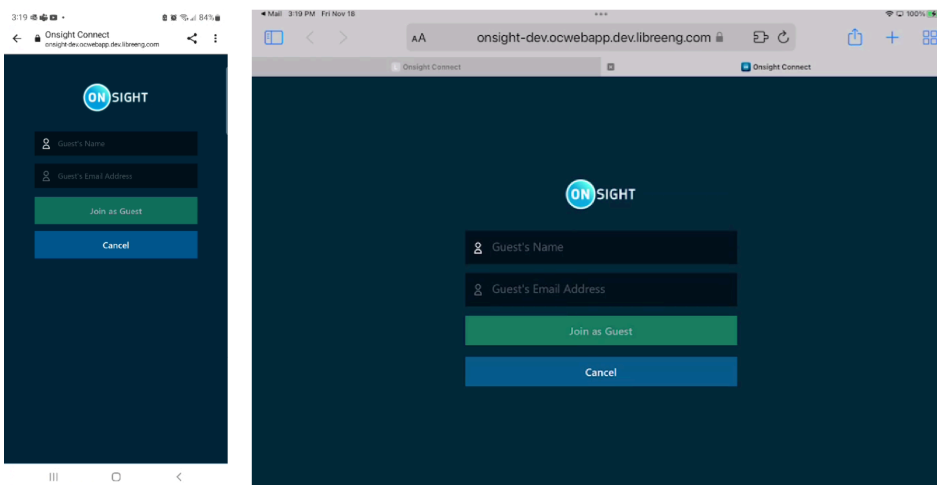


Figure 6. OnSight Meeting Invite

5. A message appears that states: waiting for the meeting to start...

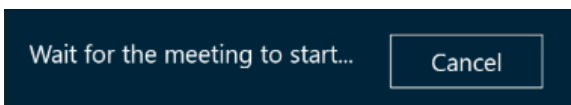


Figure 7. OnSight Meeting Invite

6. The **Host** must start the meeting and click **Accept** to admit you to the meeting. This completes the procedure.

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