

Outlook® Plug-In User Guide



For more information:
800.374.2441
www.intercall.com

InterCall, in partnership with JCS Technologies, provides an Outlook Plug-In that allows you to quickly and easily create, edit and schedule meetings with pre-defined information right from your Outlook toolbar.

Download Plug-In to Outlook

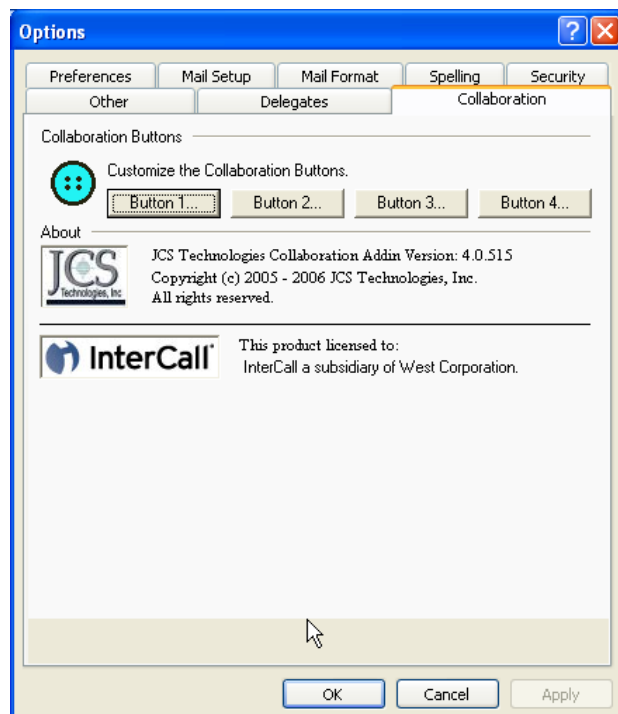
To download the Outlook Plug-In:

- 1 Visit <http://www.conferencextras.com>
- 2 Select the Outlook Plug-In option
- 3 Run the application and follow the steps listed in the installation menu.
- 4 Once the installation is complete you will need to reboot your computer for the installation to take effect.

How to Access the Plug-In Settings

In Outlook, follow the steps listed below to access and edit your settings.

- 1 Select Tools, Options on the Menu Bar.
- 2 Select the Collaboration Tab.
- 3 The screen shown below will appear.



 InterCall is a subsidiary
of West Corporation

AAP/EDE

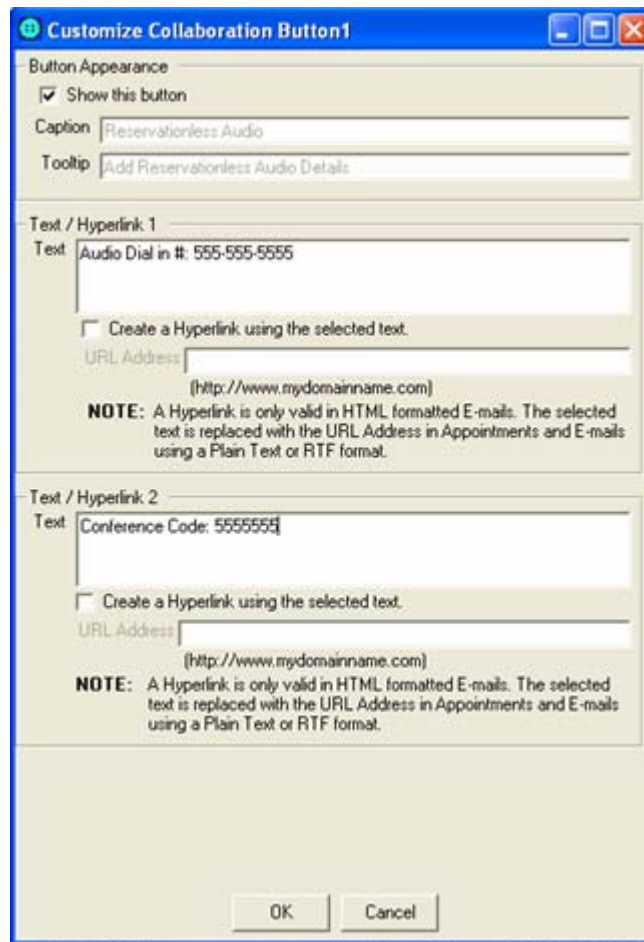
BUTTONS

You can define up to four buttons to display in Outlook. The buttons will appear when sending an email or creating a meeting invite.

There are two types of buttons:

Text / Hyperlink button can place multiple lines of text and up to two hyperlinks on appointment and email messages in Outlook.

+ Buttons 1-3 are Text/Hyperlink options.



- + Check **Show this button** if you want this button to be loaded on appointment and email messages.
- + The Caption and Tooltip have been predefined and cannot be changed.

Text / Hyperlink 1

- 1 This is the first set of text added to appointment and email messages if this button is pressed in Outlook. There is no restriction on the length of the text however the file must be less than 8,192 bytes.

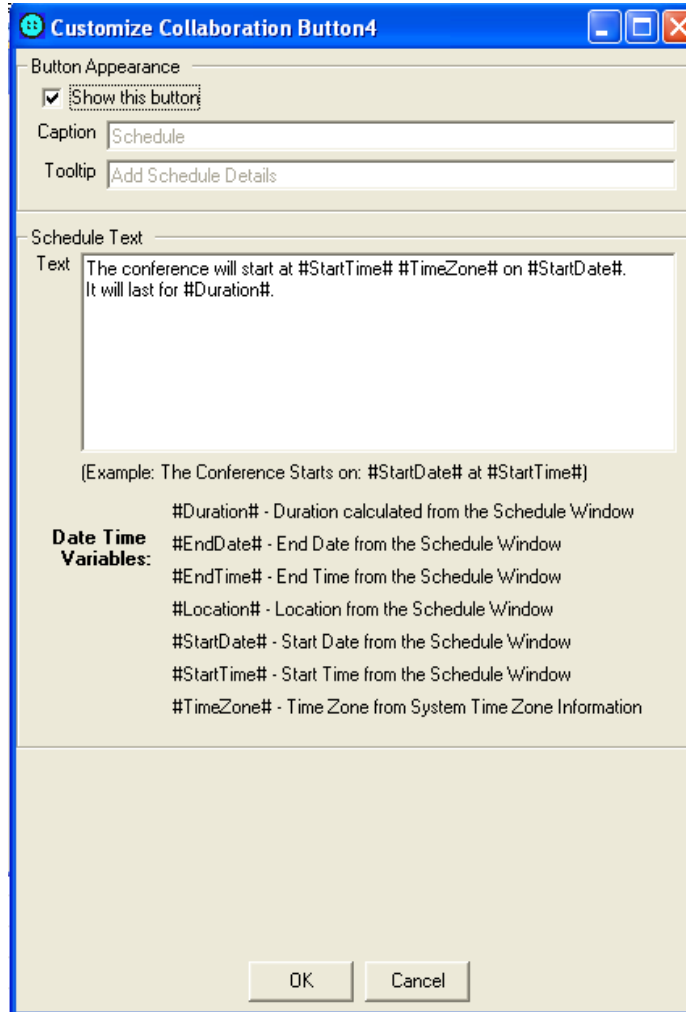
- 2 To create a hyperlink within the text, highlight the hyperlink text and check the **Create a Hyperlink...** You must enter a URL for the hyperlink in the format of http:// or https://.
- 3 A hyperlink is only valid in HTML formatted emails. On Appointment Forms or Plain Text/RTF formatted emails, the hyperlink text is replaced with the hyperlink URL.
- 4 Click **OK** to save the data or **Cancel** to discard it.

Text / Hyperlink 2

- 1 This is the second set of text added to appointment and email messages if this button is pressed in Outlook. This text field can remain empty if you do not want to include a second set of information. There is no restriction on the length of the text; however the file must be less than 8,192 bytes.
- 2 To create a hyperlink within the text, highlight the hyperlink text and check the **Create a Hyperlink...** . You must enter a URL for the hyperlink in the format of http:// or https://.
- 3 A hyperlink is only valid in HTML formatted emails. On Appointment Forms or Plain Text/RTF formatted emails, the hyperlink text is replaced with the hyperlink URL.
- 4 Click **OK** to save the data or **Cancel** to discard it.

The Schedule button will place Meeting Schedule information in an email.

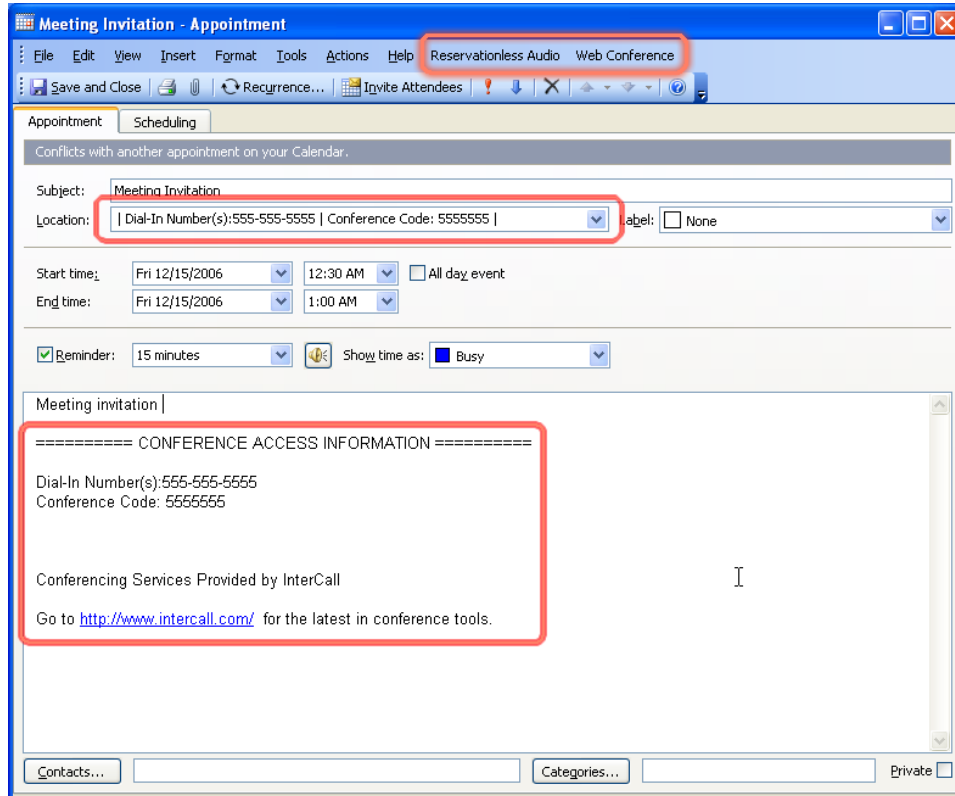
- 1 Button 4 is the Schedule option.
- 2 Check **Show this button** if you want this button to be loaded on appointment and email messages.
- 3 The Caption and Tooltip have been pre-defined and cannot be changed.
- 4 Schedule Text and Date Time Variables can be edited and will be replaced with values from the schedule form as the text is added.
- 5 The formatting of the Date Time Variables must remain in the format as shown in the example
- 6 There is no restriction on the length of the text however the file must be less than 8,192 bytes.
- 7 Click **OK** to save the data or **Cancel** to discard it.



Using the Plug-In in Meeting Invitations

The Outlook Plug-In adds buttons, as you defined during the set-up process, to the Outlook appointment window. Clicking on a button adds the Text information to the Location and Body of the Appointment/Meeting.

- 1 Open a new appointment.
- 2 Enter the information you would like to include in the notice. You do not need to include conference access information.
- 3 Select the appropriate button(s) on the Collaboration Bar. The access information will be added to the Location field and the body of the appointment.
- 4 Send the Meeting notice.

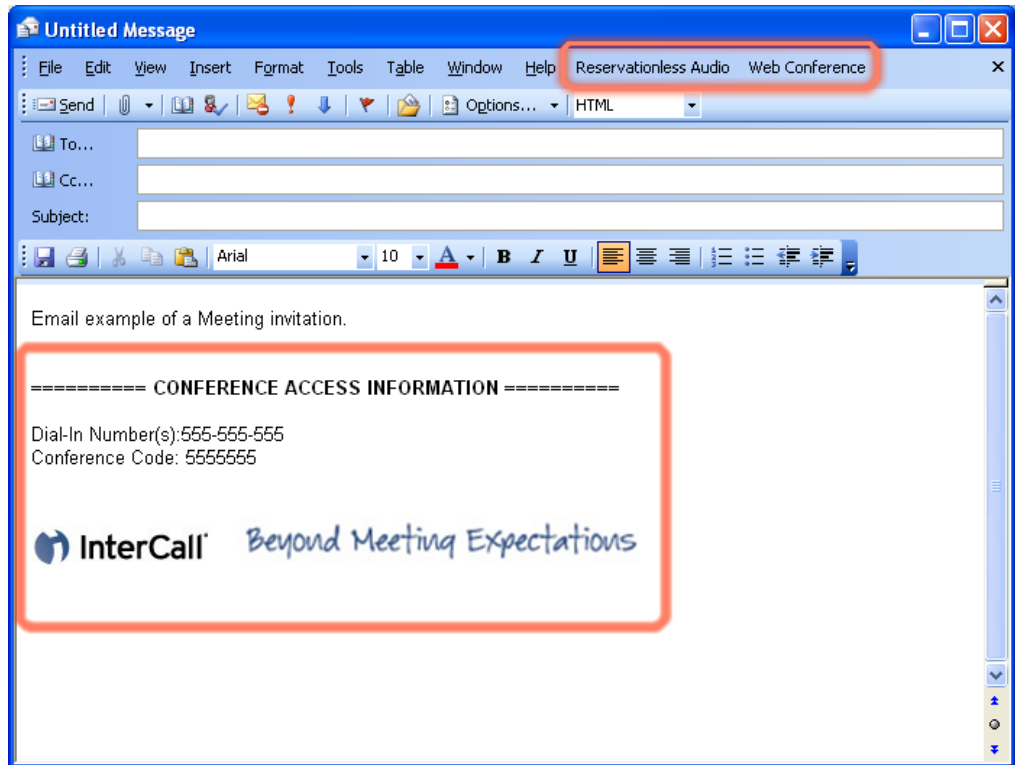


Using the Outlook Plug-In in Emails

The Outlook Plug-In adds buttons, as you defined during the set-up process, to the Outlook email window. Clicking on a button adds the appropriate information to the body of the email. Follow the steps below to start adding meeting information to your emails.

- 1 Open a new email.
- 2 Enter the information you would like to include in the email. You do not need to add schedule or access information.
- 3 Select the appropriate button(s) on the Menu Bar and the access information is added to the bottom of the email.
- 4 If you selected a schedule button a Schedule form is presented.
 1. Enter the Location, start time and end time.
 2. Check **Reminder** and enter the reminder time if you want a reminder prior to the meeting.
 3. Check **Add this meeting to my calendar** if you want the meeting added when you send the email.
 4. Check **Save as Defaults** checkbox to save the current Meeting Options as default values.
 5. Select **OK** and the information is added to your email body.
- 5 To make changes to the schedule information select the **Schedule** button again, make the changes and select **OK**. The email will be updated with the changes.
- 6 When the email is sent, an iCalendar file containing the schedule information is attached.
- 7 When a recipient of the email opens the iCalendar file, it opens as an Outlook Meeting Notice. The recipient can respond with Accept, Tentative or Decline.

Note: For Outlook 2000 SP3 and 2002 SP3 a security warning will be presented when you send the email. Select 'Yes' to continue and send the e-mail.



Removing the Outlook Plug-In

If you would like to permanently remove the Plug-In from your Outlook you will need to remove the toolbar by uninstalling it.

To permanently remove the toolbar:

- 1 Select **Add or Remove** programs from your Control Panel.
- 2 Select **Collaboration Addin for Outlook** from the list of installed programs.
- 3 Select **Remove** and follow the directions on the screen.
- 4 To access the Outlook Plug-In at a later date you will need to reinstall the download.

Outlook Plug-In Limitations and Known Issues

- + Outlook 2000 SP3 and 2002 SP3 will present a security warning when sending an email that contains schedule information from the Schedule button. Select **Yes** to continue and send the email.
- + Outlook 2000 with Word as the editor does not provide the ability to create command bars on the email form. If you want to use the Plug-In in your Outlook 2000 emails, you must configure the email settings to not use Word as the editor
 - Go to: Outlook>Tools>Mail Format, uncheck **Use Microsoft Word to edit e-mail messages**
- + Logos can only be added to HTML formatted emails. Emails use Plain Text or RTF formatting and Appointments use the Logo Text Field.
- + Outlook 2000 does not support iCalendar files.
- + Once downloaded, the Plug-In will create a vCalendar file in Outlook 2000.

- + If you are using Outlook 2000 and receive an iCalendar file from an Outlook 2002 or 2003 user, you may not be able to utilize the file to add the meeting to your calendar.
- + Outlook 2000 does not properly support reminders.
- + Reminder fields are disabled on the Schedule form in Outlook 2000.
- + Under the following conditions two Collaboration Command Bars will be shown on an email form:
 - Word is being used as the email editor.
 - No Word documents are open.
 - Outlook is opened and the first step taken by the user is to open a new email.
 - The Schedule button is used on the new email and the email remains open (not Sent or Closed).
 - Closing the initial email returns the Plug-In to normal operation.
- + You may receive an error message as listed below when creating or editing the buttons. Restart your Outlook browser and the edits and buttons will appear as you created them.

