



EventCenter™

INTEGRATION WITH OUTLOOK® USER'S GUIDE



For more information:
877.333.2666
www.intercall.ca

InterCall, in partnership with WebEx™, provides EventCenter web conferencing services. Because EventCenter is powered by WebEx, this guide makes several references to the company name, platform and features.

Integration with Outlook

Integration with Outlook provides a convenient way for you to schedule, start or join online training events using Microsoft® Outlook. Using Integration with Outlook, you can perform these activities without the need to use the EventCenter website.

Integration with Outlook is a plug-in program for Microsoft Outlook, which you download from the EventCenter website and then install on your computer. Once you install Integration with Outlook, new options appear in Outlook allowing you to quickly schedule an online training event.

When scheduling an event, you can invite attendees using any of your Outlook address lists, including the Global Address List, Personal Address List or Contacts folder. Attendees whom you invite to an event need not use Integration with Outlook to join the event.

Integration with Outlook also provides:

- + Quick access to MyWebEx™ on the EventCenter website, which includes your personal list of events, user profile and other account
- + A template for event invitations, which you can modify with any information you want.

To provide security for your events, Integration with Outlook uses 128-bit SSL (Secure Sockets Layer) encryption for all data it sends to and retrieves from the EventCenter website.

SYSTEM REQUIREMENTS

Before installing Integration with Outlook, ensure that your computer meets the following system requirements.

- + Windows 98, 2000, ME, XP, or NT
- + Intel x86 (Pentium 400 MHZ+) or compatible processor
- + Microsoft Internet Explorer 5, 6, Mozilla 1.6 or later, or Netscape 4.7, 7.x
- + JavaScript and cookies enabled for the browser
- + 56K or faster Internet connection
- + Microsoft Outlook 2000 or later

Installing Integration with Outlook

To install Integration with Outlook on your computer, you must first download the Setup program from the EventCenter website at www.intercallcenters.ca/eventcenter. Before installing Integration with Outlook, ensure that your computer is connected to the Internet and have the following information handy:

 InterCall is a subsidiary of West Corporation

AAP/EOE

- + The web address or URL (i.e. <http://companyname.webex.com>)
- + Your EventCenter user name and password

To Install Integration with Outlook:

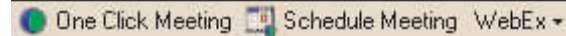
- 1 Quit Microsoft Outlook if it is running on your computer.
- 2 Go to the EventCenter website at <http://www.intercallcenters.ca/eventcenter>
- 3 Click on Resource Center.
- 4 Click on the Outlook Plug-in.
- 5 Save the Setup program to your computer.
- 6 Run the Setup program by doing either of the following:
 - a. In the Download Complete dialog box, click Open.
 - b. Double-click the Setup program, which has the file name olkInt.msi.
- 7 Follow the instructions in the Setup program.
- 8 Once installation is complete, start Microsoft Outlook.

About Integration with Outlook Options

Once you install Integration with Outlook, the following new items appear in Microsoft Outlook:

Toolbar

New options appear on the Outlook toolbar.

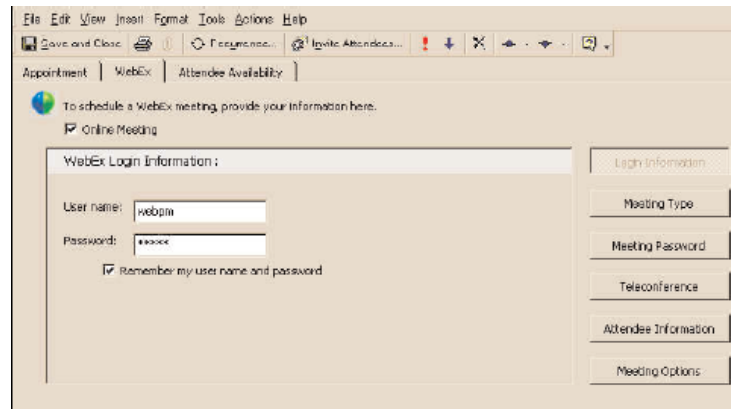


The following table describes the toolbar buttons:

Button	Description
Schedule Event	Opens the Outlook Meeting window, which now contains Integration with Outlook options for scheduling an event.
WebEx	Opens a menu on which you can: <ul style="list-style-type: none">- Access your MyWebEx area on the EventCenter website.- Specify your user account information, that is - the URL of your EventCenter website and your user name and password.- Open the template for event invitations and customize the template for your needs.- Check for updates to Integration with Outlook

WebEx Tab

A new WebEx tab appears in the Meeting and Appointment windows for your Outlook calendar, as follows:



Specifying Your WebEx Account Settings

To specify account information:

- 1 In the Microsoft Outlook, on the toolbar, click **WebEx**.
- 2 On the menu that appears, choose **Account Settings**. The WebEx Account Settings dialog box appears.



- 3 In the **WebEx site address** text box, enter the URL for your EventCenter website.
Note: The URL is typically http://companyname.webex.com. If you do not know your branded website URL, please contact your site administrator or your InterCall sales representative.
- 4 In the **User name** text box, enter your EventCenter user name.
- 5 In the **Password** text box, enter your EventCenter password.
- 6 Optional. Click **Verify** to ensure that your account information is correct.
- 7 Optional. To let Outlook log you into EventCenter automatically when you schedule an event, select the **Remember my user name and password** check box.
- 8 Click **OK** to save your account settings.

Scheduling an Event

Before scheduling an event using Integration with Outlook, be aware of the following:

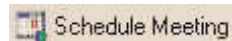
- + Integration with Outlook provides basic options for scheduling an event. Thus, some options that appear in the Schedule an Event page on the EventCenter website are not available in Integration with Outlook.

- + Integration with Outlook does not support all of the recurrence options that are available in Outlook.
- + In any event invitations that you send via Outlook, the event's starting time appears in the time zone that is set on your computer, not in your site preferences for EventCenter.
- + On the EventCenter website, all event times appear in the time zone that you set in your site preferences, regardless of the time zone that is set on your computer.
- + For Integration with Outlook, to schedule an event on the EventCenter website, your computer must be connected to the Internet. Otherwise, Integration with Outlook saves the scheduled event in your Outlook Outbox and automatically schedules the event on your site the next time your computer connects to the Internet.

Setting Up a Scheduled Event

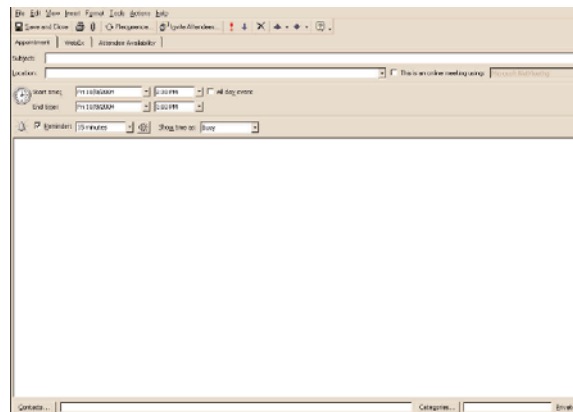
To schedule an event using Integration with Outlook, you simply open a new meeting request or appointment in Outlook and then specify information about the event, as follows:

- 1 Start a new meeting or appointment request in Outlook:
- 2 Ensure that your computer is connected to the Internet.
- 3 Do either of the following:
 - a. Click Schedule Meeting on the toolbar.



- b. On the **Actions** menu, click **New Appointment**.

The Outlook Event window appears.



Specify general event information:

- 1 In the Outlook Meeting window, type a topic for the event in the Subject box.
- 2 In the Start time and End time drop-down lists, specify the starting and ending times for the event, respectively.
- 3 *Optional* – To specify a recurrence pattern for your event, click **Recurrence** and then select recurrence options

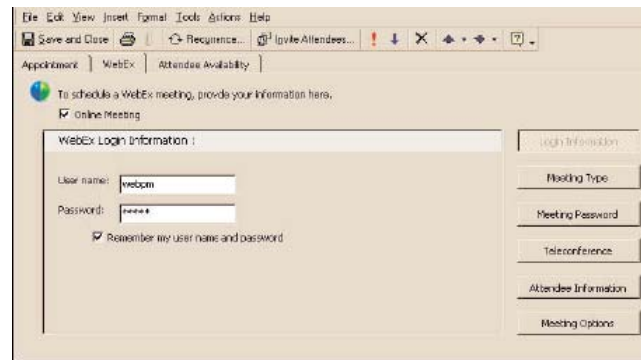
NOTE: Integration with Outlook supports only the recurrence options that are available on the EventCenter website. Optional – On the Appointment tab, specify other options that Outlook provides. For example, you can set reminder options.

Invite attendees to the event:

- 1 Click the **Attendee Availability** tab.
- 2 Specify attendees who you want to invite to the event

Provide your account information:

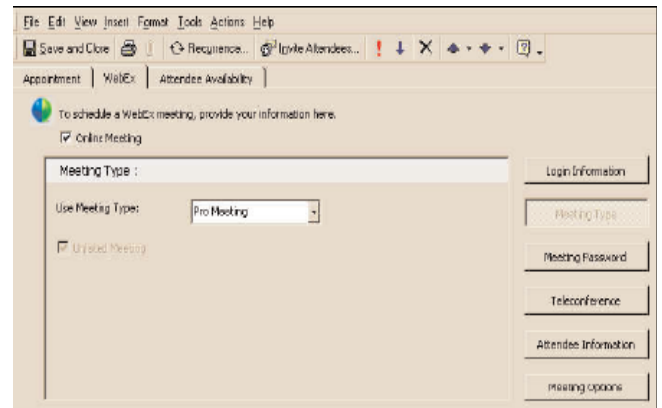
- 1 Click the **WebEx** tab. The login panel appears.



- 2 Provide your EventCenter account information
- 3 *Optional* – To automatically log into EventCenter whenever you schedule an event using Integration with Outlook, click the **Remember user name and password** check box.

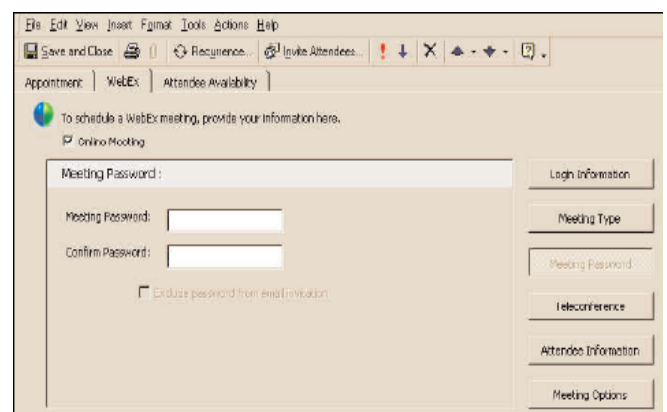
Specify general event information:

- 1 Click **Meeting Type** and select **EventCenter**. The **Meeting Type** panel appears.
- 2 Select the **Online Meeting** check box.
- 3 In the **Use Meeting Type** drop-down menu, select **EventCenter**.
- 4 Specify whether the event appears on the meeting calendar on your EventCenter website.
- 5 Specify tracking codes, if tracking codes are set up.



Specify an event Password:

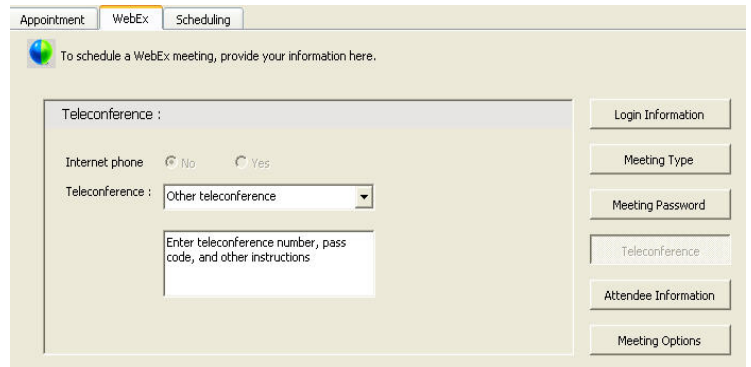
- 1 Click **Password**. The Password panel appears.
- 2 Specify a password, if applicable, for the event in the **Meeting Password** box.
- 3 Type the password again, if applicable, in the **Confirm Password** box.



- 4 *Optional* – To prevent the event password from appearing in the invitation email messages that attendees receive, select the **Exclude meeting password from email invitations** check box.

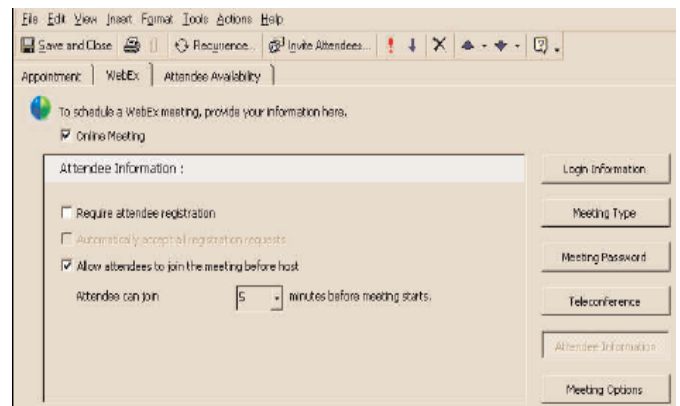
Setup an InterCall audio conference for the event:

- 1 Click **Teleconference**. The Teleconference panel appears.
- 2 Click the **Teleconference** drop-down menu. Select either **None** or **Other Teleconference**.
- 3 If you select **Other Teleconference**, enter your InterCall audio conference Dial-In Number(s) and Conference Code (if applicable).



Specify attendee information:

- 1 Click **Attendee Information**. The Attendee Information panel appears.
- 2 *Optional* – If you require attendees to register for the event, select the **Require Attendee Registration** check box.
- 3 *Optional* – If you require registration, avoid having to manually accept registration requests by selecting the **Automatically accept all registration requests** check box.



Specify Meeting Options:

NOTE: This option is not enabled for EventCenter websites.

Send event invitations:

- 1 Once you have finished setting up the event, click **Send**. Integration with Outlook contacts the EventCenter website and then adds the scheduled event to your Outlook calendar and to your list of events on your website. A message then appears confirming that the event was scheduled on the EventCenter website.
- 2 Click **OK** to close the confirmation message.

About Specifying a Recurrence Pattern for an Event

Using Outlook recurrence options, you can specify a recurrence pattern for your event. For example, you can specify that an event recurs every Wednesday at 2:00 PM until a specific date. Integration with Outlook schedules the event on each day that you specify in the recurrence pattern.

The recurrence options that you can use in Outlook are limited to the options that are available on your EventCenter website. *The following are the recurrence options in Outlook that EventCenter does not support:*

- + Recur every [X] week(s) on [Monday/Tuesday/Wednesday/Thursday/Friday/Saturday/Sunday]. For this option, the value of X must always be 1.
- + The [first/second/third/fourth/last] [day/weekday/weekend day] of every [X] month(s). For this option, you can select only a specific day of the week, not day, weekday or weekend day.

About Inviting Attendees

When using Integration with Outlook to schedule an event, you can invite attendees by selecting them in any of your Microsoft Outlook contact lists. For example, if your organization maintains a Global Address List, you can invite attendees by selecting their names in that list. You can also invite attendees who are not in an Outlook contacts list by providing their email addresses.

Once you invite an attendee to a scheduled event, he or she receives an invitation email message. The invitation includes information about the event – including its password (if applicable) – and a link that the attendee can click to join the event. It is good practice to send a copy of the invitation to yourself for reference.

NOTE: Any attendees that you invite using Outlook do not appear in the attendees list for the event on the EventCenter website.

About the Meeting Types Panel

The Integration with Outlook Meeting Types panel contains the following options:

- + **Online meeting** - Specifies that you are hosting the event using EventCenter. You must select this option to schedule the event on your EventCenter website.
- + **Use Meeting type** - Available only if your site provides different meeting types. Each event type provides a different set of available options.
- + **Unlisted meeting** - Specifies that the scheduled event does not appear on the calendar on your EventCenter website. An unlisted event prevents visitors to the site from viewing information about the event, such as its host, topic and starting time, and helps to prevent unauthorized access to the event. To join an unlisted event, an attendee must provide a unique meeting number.

If you invite an attendee to an unlisted event, the event invitation includes complete instructions for joining the event - including the event number and a link to the web page in which the attendee can join the event.

- + **Tracking codes** - If your organization uses tracking codes, options for your project, division, department and so on appear in the panel. To specify tracking codes, do one of the following:
 - If a list of codes appears in the box on the right, select a code from the list.
 - Type a code in the box on the right.

About the Meeting Password Panel

On the Integration with Outlook Meeting Password panel, you can require that attendees provide a password to attend an event. If you require a password, all participants must provide the password to attend the event. Thus, requiring a password helps to secure an event from unauthorized access. If you invite a participant to an event that requires a password, the participant receives an invitation email message that includes the password, unless you specify that passwords do not appear in email invitations.



If you choose to exclude the password from email invitations, then you must provide the password to attendees by another method – for example, by phone. To exclude the password from the invitation, on the **WebEx** tab, select the **Exclude password from email invitation** check box.

About the Teleconference Panel

The Integration with Outlook Teleconference panel contains the following options:

- + **None** – The event does not include an audio conference.
- + **Other Teleconference** – If you select this option, you can provide the instructions for joining your InterCall audio conference call. The instructions will appear in the event invitations that you send to attendees.

Using Audio Conferencing Options

Once you schedule an event, instructions for joining the audio conference automatically appear:

- + On the Event Information page on your site, which participants can view before you start the event
- + In invitation email messages, if you invite participants using Outlook
- + In the Join Teleconference dialog box, which appears in participants' event windows once they join the event.

About the Attendee Information Panel

The Integration with Outlook Attendee Information panel contains the following options:

- + **Require attendee registration:** Specifies that all attendees must register to attend the event. An attendee cannot attend the event until you accept his or her registration request. To register for an event, attendees must provide the following information:
 - First name
 - Last name
 - Email address

NOTE: You can require attendees to provide additional information when registering for an event by editing the event on the EventCenter website and using the registration options in the Schedule Training Wizard. If you require registration, the Exclude password from email invitation check box on the Meeting Password panel is automatically selected. Once you approve an attendee's registration request, the attendee receives another automatic email message that includes the password. Thus, it is recommended that you customize your invitation email message with instructions about registering for the event.

- + **Automatically accept all registration requests:** Accepts all registration requests automatically and lets all registrants attend the event. You do not receive registration requests. If this option is not selected, you must accept or reject each registration request individually using the options on the EventCenter website.
- + **Allow attendees to join meeting before host:** Specifies that participants can join the event a specified number of minutes before the event's scheduled start time.
- + **Attendees can join [x] minutes before meeting starts:** Specifies the number of minutes before an event's scheduled start time that attendees can join the event.

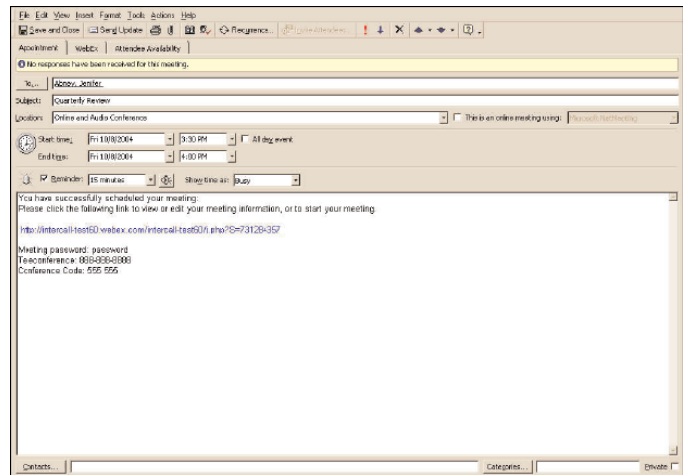
NOTE: If you let participants join the event early— that is, before its scheduled start time— you can automatically share a presentation once a participant joins the event. This option is useful if you want to share information or entertain participants while they wait for you to start the event.

Adding Information to Your Training Meeting Invitation

If you invited attendees to your event, you can add information to the event invitation that they receive before you send it. For example, you can provide additional information about the event that Integration with Outlook does not automatically provide for you, such as an agenda, information about the presenters and so on. Any text that you add automatically appears on the Agenda page for the event on the EventCenter website.

To add information to your meeting invitation:

- 1 Once you have finished setting up an event and inviting attendees, choose **Save** in the Outlook Meeting window on the File menu. Integration with Outlook contacts your EventCenter website and then adds the scheduled event to your Outlook calendar and to your list of events on the EventCenter website. A message then appears confirming that the event was scheduled on the EventCenter website.
- 2 Click **OK** to close the confirmation message. On the **Appointment** tab of your invitation, information about your event automatically appears in the text box, such as the URL, the event password, if required and the audio conference information.
- 3 On the **Appointment** tab, type any additional information about the event in the text box below the information that automatically appears.
- 4 Click **Send**.



NOTE: Ensure that you add information below the event information that Integration with Outlook automatically provides in the message area on the Appointment tab. Do not type any text in the area in which event information automatically appears. If you format the text that you add to the invitation, the formatting does not appear on the Agenda page for the event on the EventCenter website.

Modifying a Scheduled Event

Once you schedule an event using Integration with Outlook, you can use Outlook to modify it at any time. For example, you can change its starting time, specify a new password, change the audio conference number and so on. Once you modify a scheduled event, Integration with Outlook sends an updated event invitation to any attendees whom you invited to the event and updates the event information on the EventCenter website.

IMPORTANT: If you modify an event using the EventCenter website, your changes do not appear in Outlook. For example, if you change the event's start time using your site, the starting time does not change on your Outlook calendar. Thus, InterCall® recommends that you only use Outlook to modify an event.

To modify a scheduled event:

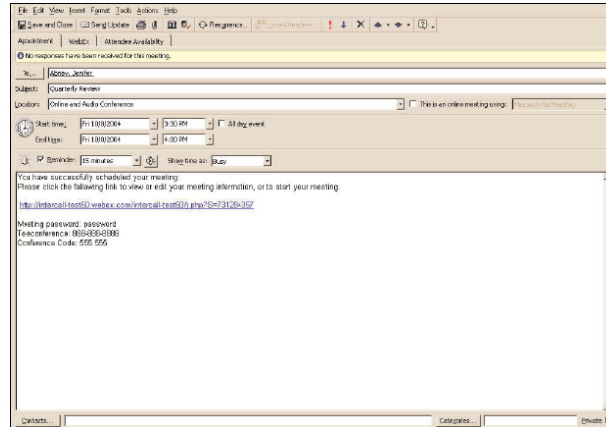
- 1 On your Microsoft Outlook calendar, open the item for the scheduled event.
- 2 Modify the information and options on either the Appointment tab or WebEx tab.
- 3 Click **Send Update**.

Integration with Outlook contacts the EventCenter website and updates the event on the site. A message appears confirming that your event was updated.

Starting an Event

Once you schedule an event using Integration with Outlook, you can start the event in either of the following ways:

- + On your Microsoft Outlook calendar, open the event item then click the link to start the event.



+ Log in to your EventCenter website and then start the event from your My WebEx Events page.

NOTE: The link that appears in your event item is for event hosts only. The link that appears in attendee's invitations is a different link, which attendees can click to join the event.

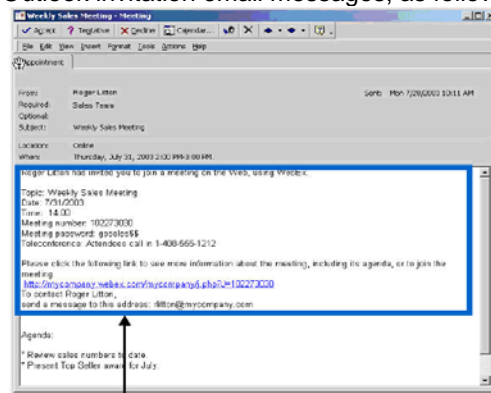
Canceling an Event

You can cancel an event in Microsoft Outlook. All attendees whom you invited to the event automatically receive a cancellation notice. If your computer is connected to the Internet, Integration with Outlook also contacts the EventCenter website and cancels or removes the event from the site. A message appears confirming that your event was removed from the EventCenter website. You also receive a cancellation notice in an email message.

NOTE: If you cancel an event using the EventCenter website, your site does not automatically cancel the event on your Outlook calendar. Thus, InterCall recommends that you cancel events using Outlook instead of the EventCenter website.

Customizing the Event Invitation Template

Integration with Outlook provides a template for event invitations that you send to attendees. The information in the template appears in the text area of the Microsoft Outlook invitation email messages, as follows:



This area contains information from the invitation template.

This template includes both default text and variables—codes that your event service recognizes and substitutes with your specific event information. You can customize this template by editing the default text, rearranging variables and removing variables.

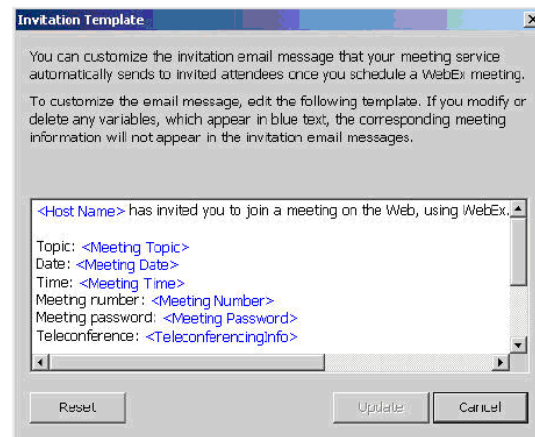
The default event invitation template provides the following variables:

Variable	Definition
<Host Name>	Displays your full name, as it appears in your user profile on your web conference website.
<Meeting Topic>	Displays the topic for the event, as it appears in the Subject box in your event invitation.
<Meeting Date>	Displays the date on which the event occurs, as it appears in the Start Time box in your event invitation.
<Meeting Number>	Displays the unique number that your event service assigns to an event. For an unlisted event, participants must provide the event number to attend the event.
<Meeting Password>	Displays the password for the event, as you specified it on the Event password panel when scheduling the event.
<Teleconferencing Info>	Displays information about how to join the audio conference for the event.
<Meeting Link>	Displays the Web address, or URL, that attendees can click to join the event.
<Host Email>	Displays your email address as it appears in your user profile on your web conference website.

Once you customize the template, you can reset it to its default state at any time, regardless of whether you removed any variables.

To customize the event invitation template:

- 1 In Microsoft Outlook, on the toolbar, click **WebEx**.
- 2 On the menu that appears, choose **Invitation Template**. The Invitation Template window appears.



- 3 Modify the message as necessary.
- 4 Click **Update**.

To reset the event invitation template to its default state:

- 1 In Microsoft Outlook, on the toolbar, click **WebEx**.
- 2 On the menu that appears, choose **Invitation Template**. The Invitation Template appears.

Joining an Event

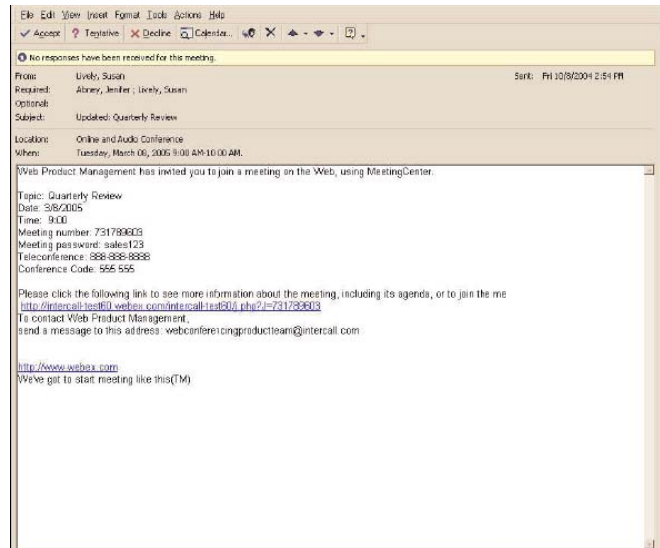
If an event host uses Integration with Outlook to invite you to an event, you receive an invitation email message that includes a link that you can click to join the event. The invitation differs depending on whether or not you use Microsoft Outlook.

Joining an Event Using Outlook

If you use Microsoft Outlook, you receive an invitation email message in your inbox. Once you accept the invitation, it appears on your Outlook calendar.

To join the event, open the invitation on your calendar and then click the link to join the event.

The figure to the right shows an example of an event invitation in Outlook:



Checking for Updates to Integration with Outlook

You can periodically check for updates to Integration with Outlook. If an update is available, Integration with Outlook asks you whether or not you want to install the update.

To check for updates to Integration with Outlook:

- 1 If necessary, start Microsoft Outlook.
- 2 On the Outlook toolbar, click **WebEx**.
- 3 On the menu that appears, choose **Check for Update**.

Removing the Outlook Plug-in

You can do either of the following:

- + Temporarily remove the WebEx tab that appears in your Meeting and Appointment windows in Microsoft Outlook.
- + Remove, or uninstall, the Outlook plug-in from your computer.

Temporarily Removing the WebEx Tab from Outlook

If you selected the Integration with Outlook form to be your default Meeting and Appointment forms in Microsoft Outlook, a WebEx tab always appears in the Meeting and Appointment windows in Outlook. However, you can remove this tab at any time without uninstalling the Outlook plug-in.

To remove the WebEx tab, you must choose another form to be your default Meeting and Appointment form in Outlook. You can switch between Integration with Outlook form and another form at any time.

To remove the WebEx tab from the Meeting and Appointment windows:

- 1 In Microsoft Outlook, in the folder list, right-click **Calendar**.
If the Folder List is not visible, choose **Folder List** on the **View** menu
- 2 On the menu that appears, choose **Properties**. The Calendar Properties dialog box appears.
- 3 Ensure that the **General** tab is selected.
- 4 In the **When posting to this folder use** drop-down list, select **Appointment**—which is the default form for events and appointments in Outlook—or another form that your organization uses.
- 5 Click **OK**. The WebEx tab no longer appears in the Meeting and Appointment windows in Outlook.

Uninstalling Integration with Outlook

You can remove the Outlook plug-in from your computer at any time using either the Windows Add/Remove Programs utility or the Setup program that you downloaded when installing the Outlook plug-in.

To uninstall Integration with Outlook:

- 1 Quit Microsoft Outlook.
- 2 Ensure that no Outlook processes are still running on your computer. To do so, you can reboot your computer or you can terminate any running Outlook processes, as follows:
 - a. Press **Ctrl+Alt+Delete** on your computer's keyboard.
 - b. Click **Task Manager**.
 - c. Click on the **Processes** tab
 - d. Select the OUTLOOK.EXE process.
 - e. Click **End Process**.
- 3 Do either of the following:
 - a. Open the Windows Add/Remove Programs utility on your computer, select **My WebEx Integration with Outlook** and then select the option to remove the program.
 - b. Double-click the Integration with Outlook Setup program (olkInt.msi) and then follow the instructions to remove the program.

Contacting InterCall

Technical Support

For information about receiving technical support for EventCenter, refer to the InterCall Centers website at www.intercallcenters.ca and select Contact Us.

Training

For information about receiving Training on EventCenter, refer to the InterCall Centers website at www.intercallcenters.ca and select Training.

Sales

For information about InterCall's conferencing services, please contact your sales representative or visit www.intercall.ca.

For additional information about using EventCenter, please refer to the Help section on the EventCenter website at www.intercallcenters.ca/eventcenter.