U S E R   G U I D E

Outlook Plug-In

Send Conference Invites from Outlook

Scheduling conference calls and always typing in the same dial-in number and conference code can be a bit tedious, especially when you're in a hurry. That's why we provide 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.

Downloading Outlook Plug-In

Follow these step-by-step instructions to download the Outlook Plug-In:

1. Go to http://www.meetingconnect.net/tools/outlook-plugin.php

2. Click **Download Outlook Plug-In**

3. Open the zip file and extract the .exe file.

4. Run the .exe file, select setup and follow the steps listed in the installation menu.

5. Once the installation is complete you will need to restart Outlook for the installation to take effect.

Accessing Outlook Plug-In Settings

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

1. In Outlook 2007 or below:
   Select Tools, click Options and then choose Collaboration.

   In Outlook 2010:
   Select File, click Collaboration and then choose Preferences.

2. The Customization screen will appear.

3. Define up to five buttons to display in Outlook by following the instructions in the section below. The buttons will appear when sending an email or creating a meeting invite.

With a single click, your Reservationless-Plus conferencing details are automatically inserted into an email, making scheduling your meetings a snap.

Outlook Plug-In Allows You to:

- Create one-click access to conferencing information using buttons in your email toolbar and the Outlook meeting invitation window.

- Add audio or web conferencing information, including your conference dial-in numbers, conference codes and web conferencing URLs, to your Outlook emails and meeting invitations.

- Send meeting requests via your Outlook calendar allowing attendees to accept, decline or tentatively accept the meeting invitation.
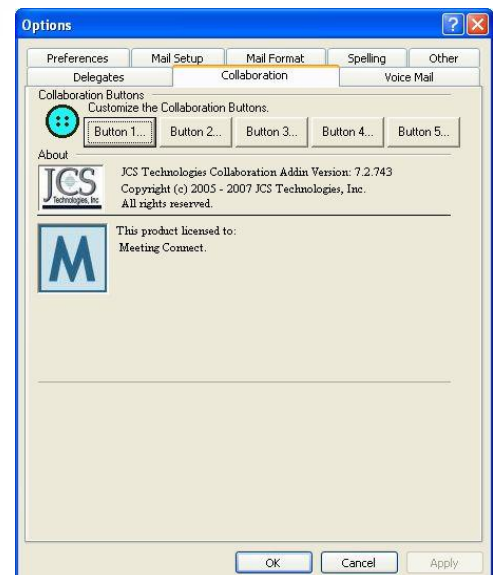
Defining Outlook Plug-In Buttons

There are two types of buttons you can define in your Outlook Plug-In:

Figure 1: Text/Hyperlink

- **Text/Hyperlink** (Figure 1)
  Allows you to place multiple lines of text and up to two hyperlinks on appointment and email messages in Outlook.

    o Buttons 1 to 3 and 5 are text/hyperlink options.

    o The Caption and Tooltip fields are predefined and cannot be changed.

- **Schedule** (Figure 2)
  Allows you to place meeting schedule information in an email.

    o Button 4 is the Schedule option.

    o The Caption and Tooltip fields are predefined and cannot be changed.
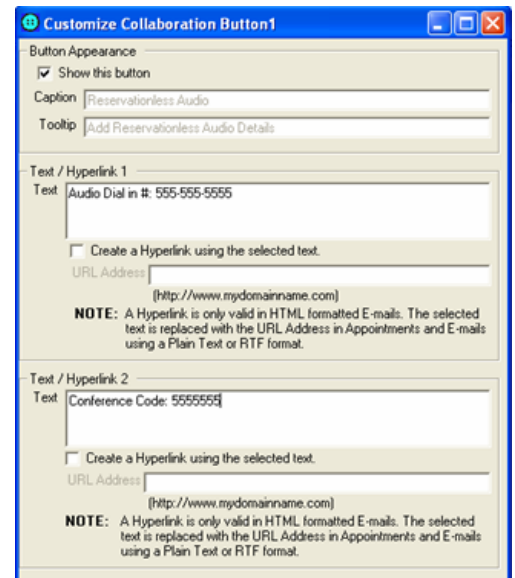
Text/Hyperlink 1

- 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.

- Follow these steps to create a hyperlink within the text:

    1. Highlight the hyperlink text.

    2. Check **Create a Hyperlink using the selected text**.

    3. Enter a URL for the hyperlink in the format of http:// or https://.

    4. Click **OK** to save the data or **Cancel** to discard it.

- A hyperlink is only valid in HMTL formatted emails. On appointment forms or plain text/DTF formatted emails, the hyperlink text is replaced with the hyperlink URL.

Text/Hyperlink 2

- 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.

- Follow these steps to create a hyperlink within the text:

    1. Highlight the hyperlink text.

    2. Check **Create a Hyperlink using the selected text**.

    3. Enter a URL for the hyperlink in the format of http:// or https://.

    4. Click **OK** to save the data or **Cancel** to discard it.

- A hyperlink is only valid in HMTL formatted emails. On appointment forms or plain text/DTF formatted emails, the hyperlink text is replaced with the hyperlink URL.

Schedule

- There is no restriction on the length of the text; however the file must be less than 8.192 bytes.

- Follow these steps to set up a Schedule button:

  1. Check **Show this button**.

  2. Schedule Text and Date Time Variables can be edited and will be replaced with values from the schedule form as the text is added.

  3. The formatting of the Date Time Variables must remain in the format as shown.

  4. Click **OK** to save the data or **Cancel** to discard it.

Using Outlook Plug-In in Meeting Invitations

The Outlook Plug-In adds the buttons you have defined in 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 invite.

Figure 2: Schedule

1. Open a new appointment.

2. Enter the information you would like to include in the invite. You do not need to include your conference access information.

3. Select the appropriate button(s) on the Collaboration bar. Your conference access information will be added to the Location field and the body of the appointment.

4. Send your meeting invite.

Using Outlook Plug-In in Emails

The Outlook Plug-In adds the buttons you have defined in the set-up process to the Outlook appointment window. Clicking on a button adds the text information to the body of the email.

1. Open a new email.

2. Enter the information you would like to include in the email. You do not need to include your conference access information.

3. Select the appropriate button(s) on the Menu bar. Your conference access information will be added to the bottom of your email.

4. If you selected a schedule button a Schedule form is presented.

   o Enter the location, start time and end time.

   o Check **Reminder** and enter the reminder time if you would like a reminder prior to your meeting.

   o Check **Add this meeting to my calendar** if you would like the meeting to be added to your calendar when you send the email.

   o Check **Save as Defaults** to save the current meeting options as default values.

   o Select **OK**. The information will be 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 your changes.
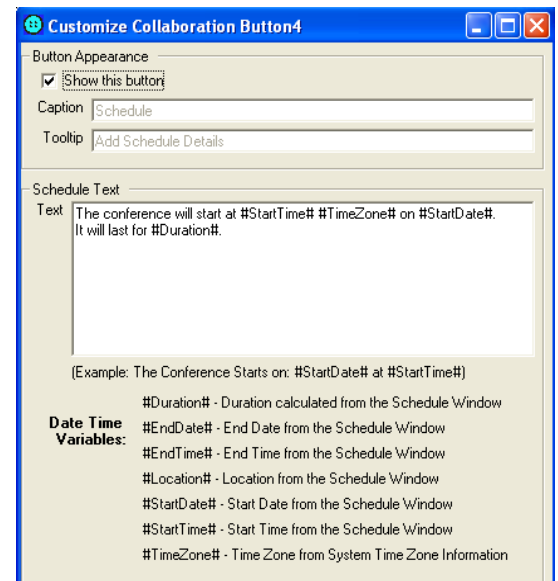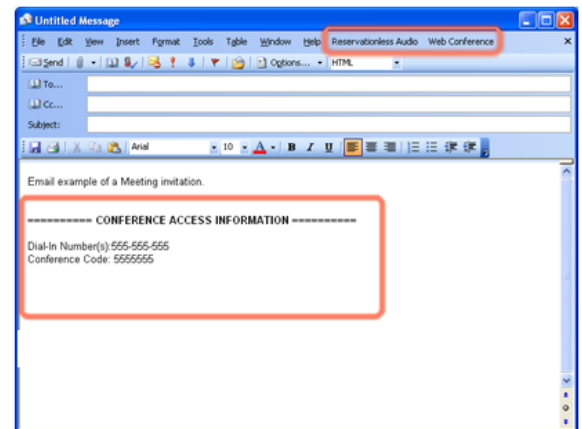
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6. Send your email. When the email is sent, an iCalendar file containing the schedule information is attached.

   Please note: For Outlook 2000 SP3 and 2002 SP3, a security warning will be presented. Select **Yes** to continue.

7. When a recipient of the email opens the iCalendar file, it opens as an Outlook meeting notice. The recipient can respond with Accept, Tenative or Decline.

Removing Outlook Plug-In

If you would like to permanently remove the Plug-In from your Outlook, follow the instructions below to uninstall 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.

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 via 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 would like to use the Plug-In in Outlook 2000 emails, you must configure the email settings to not use Word as the editor.

  o Go to: Outlook → Tools → Mail Format and uncheck **Use Microsoft Word to edit email 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.

  o Once downloaded, the Plug-In will create a vCalendar file in Outlook 2000.

  o 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

  o 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:

  o Word is being used as the email editor.

  o No Word documents are open.

  o Outlook is opened and the first step taken is to open a new email.

| 4
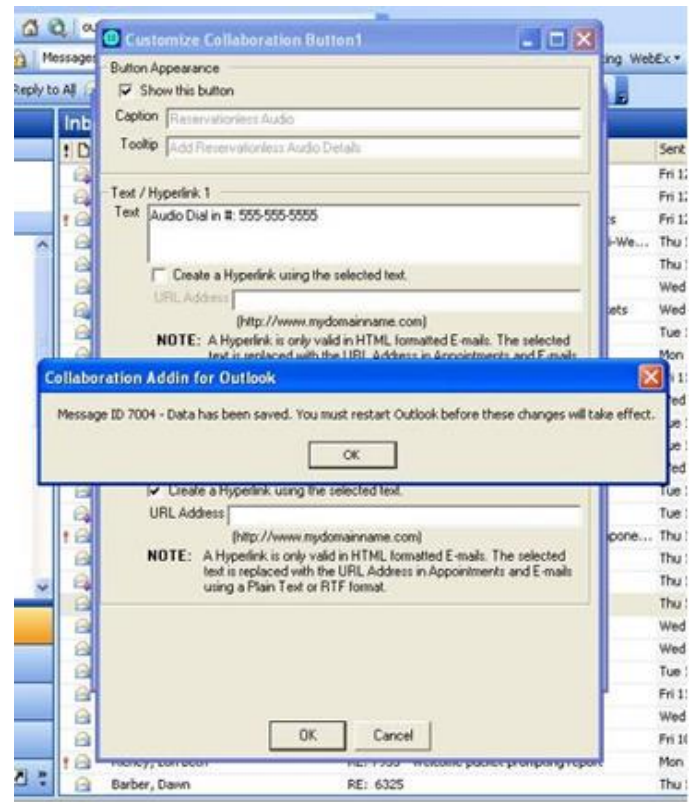
- o The schedule button is used on the new email and the email remains open (not sent or closed).
  - o Closing the initial email returns the Plug-In to normal operation.
- You may receive an error message as listed below when creating or editing the buttons. Restart your Outlook browser and your edits and buttons will appear as you created them.

CUSTOMER CARE

If you have any questions please contact customer care at (800) 896-1204. Please have your Owner Number available to provide to the customer care representative.