



Outlook® Plug-In

User Guide



www.intercalleeurope.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

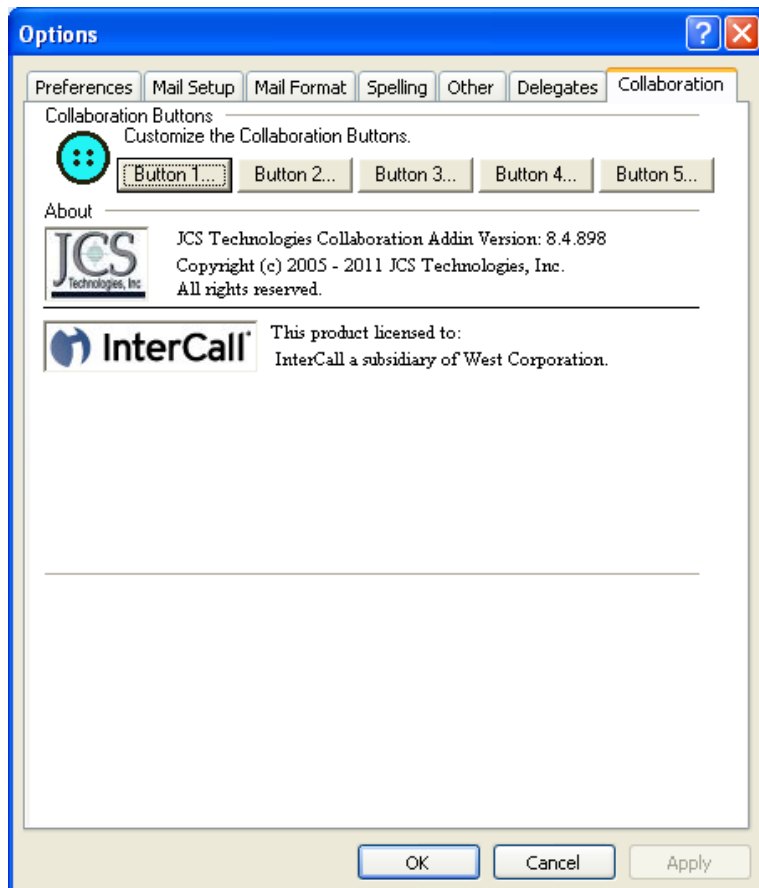
To download the Outlook Plug-In:

- 1 Go to <http://www.intercalleeurope.com/tools/outlook-plugin.php>.
- 2 Click **Download**.
- 3 In the pop-up box, enter your First Name, Last Name and Email address.
 - a. Be sure to enter a valid email address as the link to download the plug-in will be sent to that address.
- 4 Click **Send**.
- 5 You will receive an email where to must click **Download now** to begin the installation process.
- 6 Once complete you will need to restart Outlook 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** then **Options** from the Menu Bar.
- 2 Select the **Collaboration** Tab.
- 3 The screen shown below will appear.



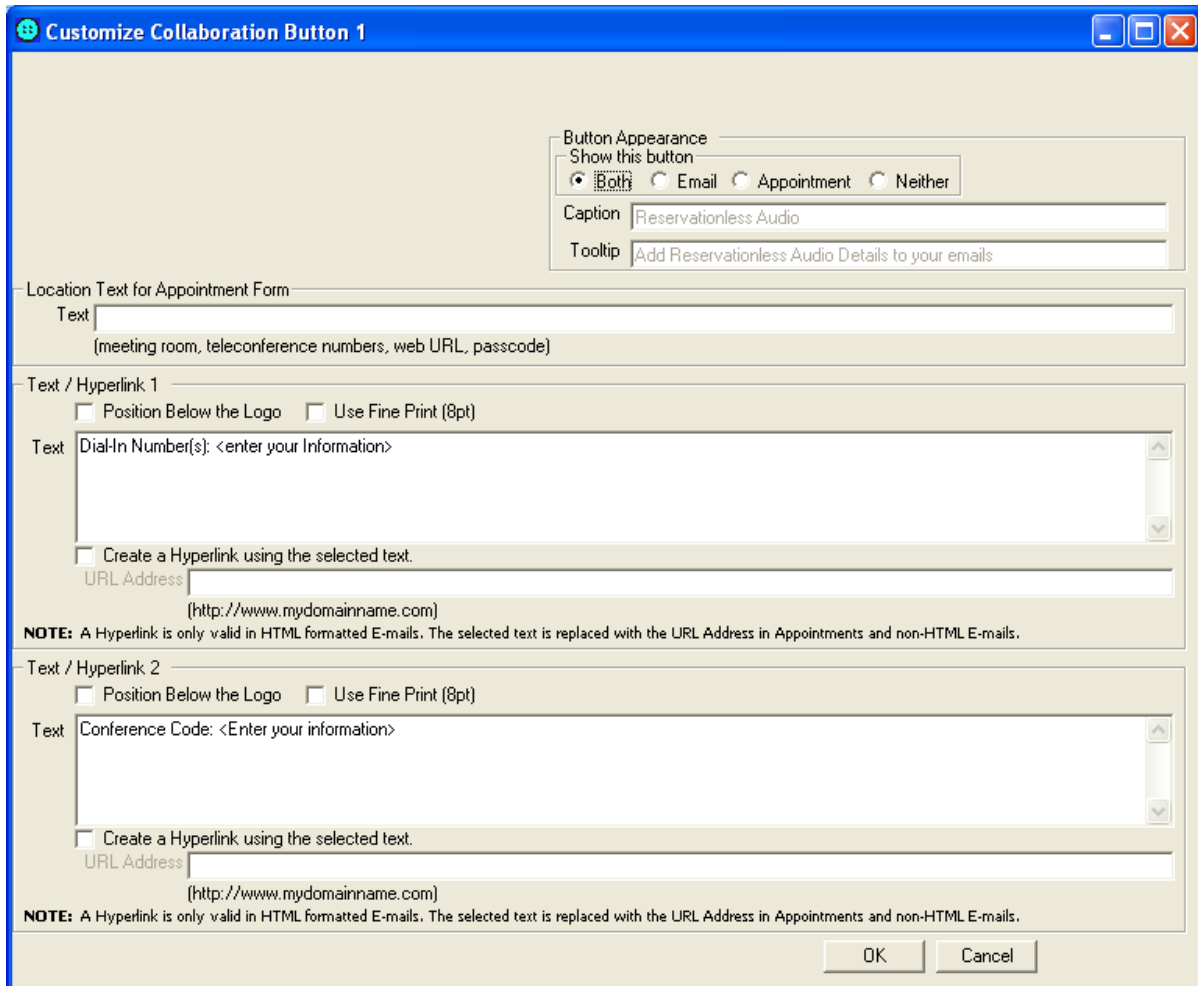
BUTTONS

You can define up to five 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.

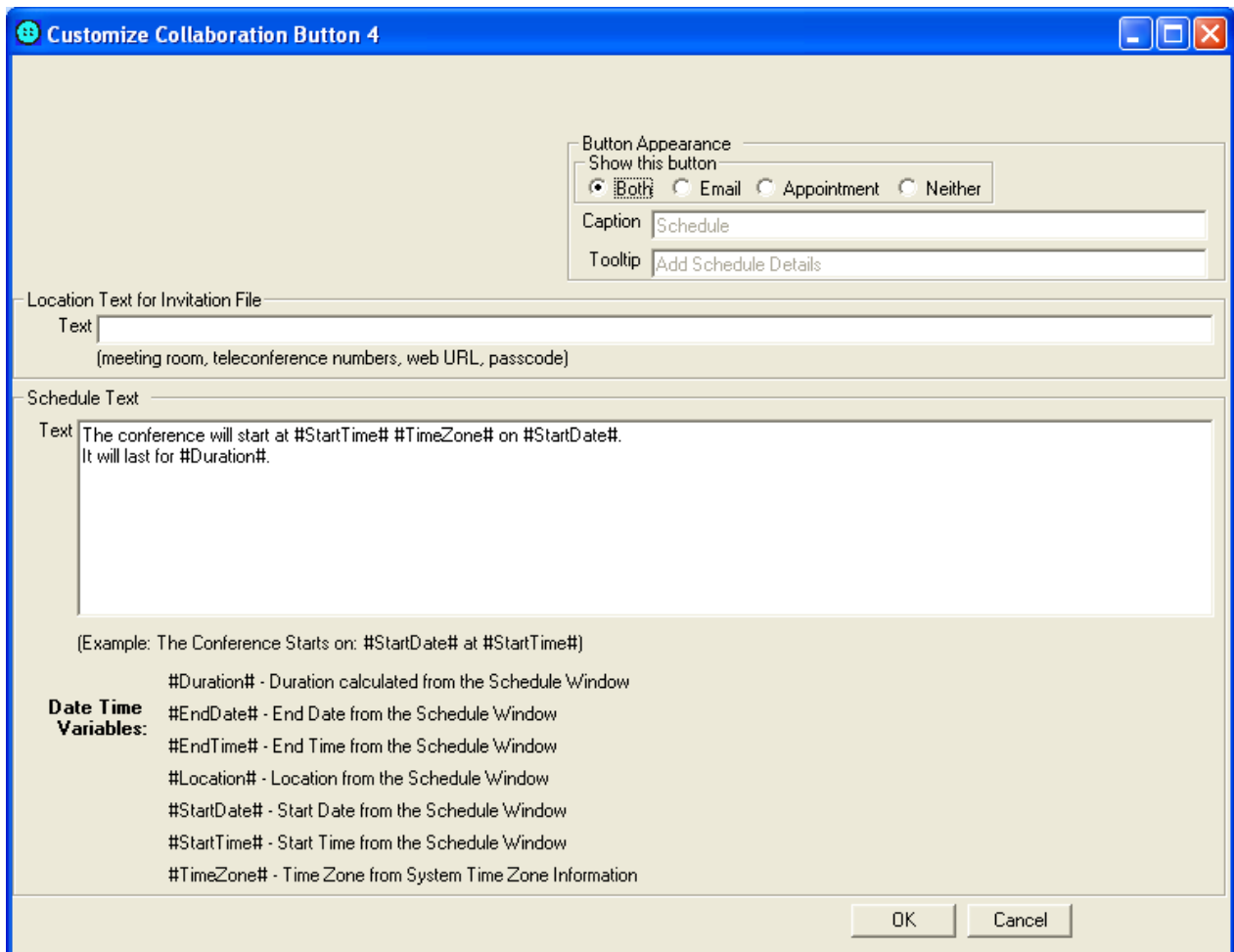
+ Buttons 1, 2, 3 & 5 are Text/Hyperlink options.



- + Check the required radio button in the **Show this button** section to determine where this option should appear.
- + The **Caption** and **Tooltip** have been predefined and cannot be changed.
- + In the **Location Text for Appointment Form** box, enter the label which you want to appear in the email subject heading e.g. Reservationless-Plus.
- + In the first **Text** box, enter your dial-in numbers which can be copied and pasted from your InterCall welcome email. There is no restriction on the length of text however the file must be less than 8,192 bytes.
- + 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://`.
- + 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.
- + In the second **Text** box you should enter your Conference Code and follow the same steps above to make any aspect of the text a hyperlink.
- + Click **OK** to save the data or **Cancel** to discard it.

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

- + Button 4 is the Schedule option.
- + Select the **Both** radio button in the **Show this button** section if you want this button to be loaded on appointment and email messages.
- + The **Caption** and **Tooltip** have been pre-defined and cannot be changed.
- + In the **Location Text for Appointment Form** box, enter the label which you want to appear in the email subject heading e.g. Reservationless-Plus.
- + **Schedule Text** and **Date Time Variables** can be edited and will be replaced with values from the schedule form as the text is added.
- + The formatting of the **Date Time Variables** must remain in the format as shown in the example
- + There is no restriction on the length of the text however the file must be less than 8,192 bytes.
- + Click **OK** to save the data or **Cancel** to discard it.



Customize Collaboration Button 4

Button Appearance
 Show this button
 Both Email Appointment Neither

Caption: Schedule
 Tooltip: Add Schedule Details

Location Text for Invitation File
 Text: _____
 (meeting room, teleconference numbers, web URL, passcode)

Schedule Text
 Text: The conference will start at #StartTime# #TimeZone# on #StartDate#. It will last for #Duration#.

(Example: The Conference Starts on: #StartDate# at #StartTime#)

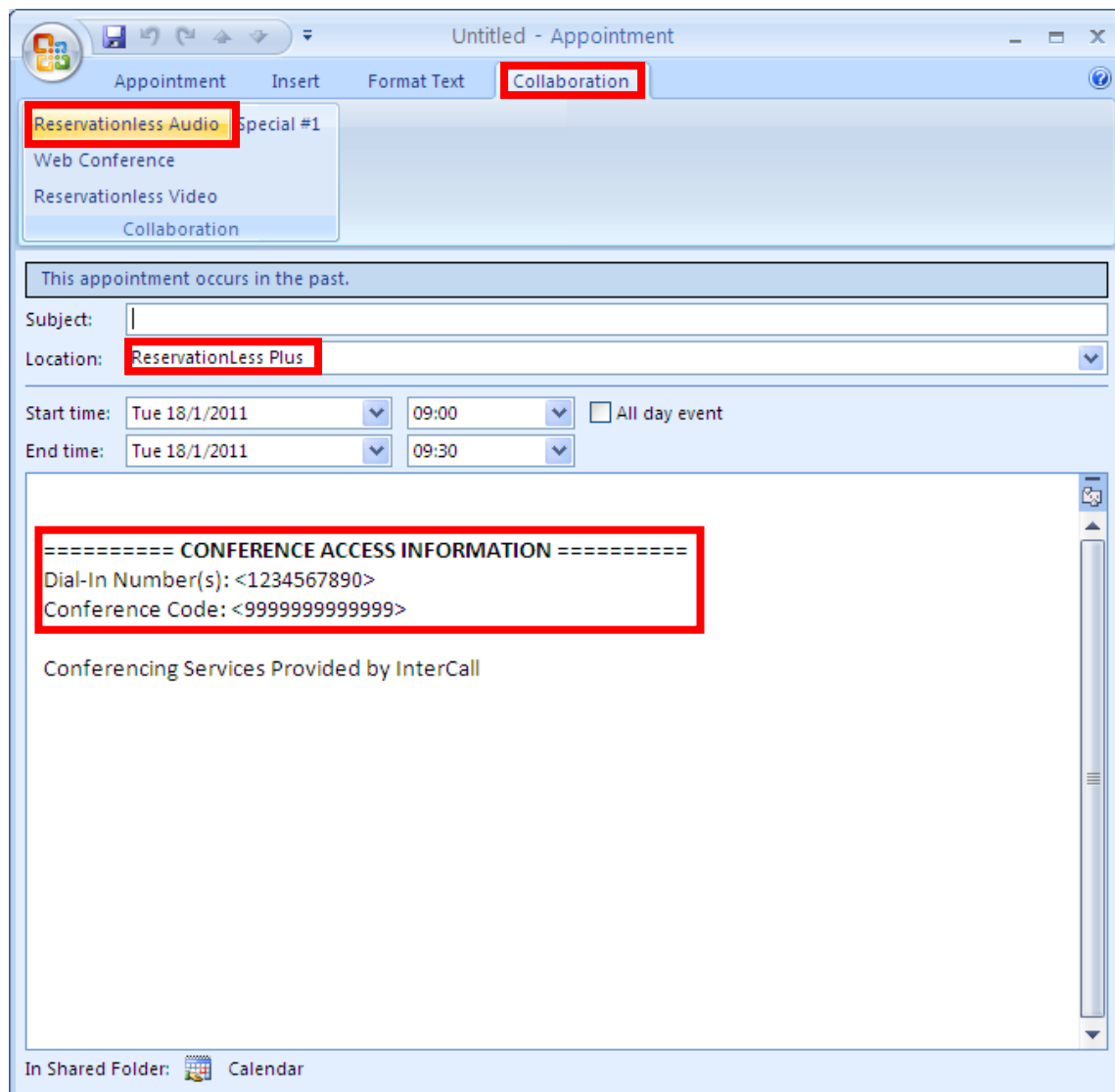
Date Time Variables:
 #Duration# - Duration calculated from the Schedule Window
 #EndDate# - End Date from the Schedule Window
 #EndTime# - End Time from the Schedule Window
 #Location# - Location from the Schedule Window
 #StartDate# - Start Date from the Schedule Window
 #StartTime# - Start Time from the Schedule Window
 #TimeZone# - Time Zone from System Time Zone Information

OK Cancel

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.

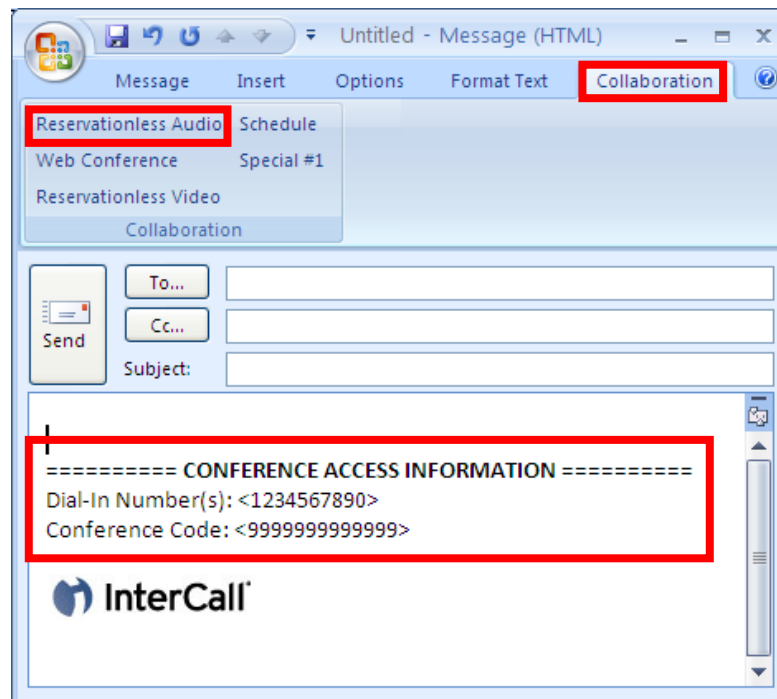




Using the Outlook Plug-In in Emails

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.

- 1 Open a new email and enter the information you would like to include. You do not need to add schedule or access information.
- 2 Select the appropriate button(s) on the Menu Bar and the access information is added to the bottom of the email.
- 3 If you selected the **Schedule** option a schedule form is presented.
 - Enter the Location, start time and end time.
 - Check **Reminder** and enter the reminder time if you want a reminder prior to the meeting.
 - Check **Add this meeting to my calendar** if you want the meeting added when you send the email.
 - Check **Save as Default Values** to save the current meeting options as default values.
 - Select **OK** and the information is added to your email body.
- 4 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.
- 5 When the email is sent, an iCalendar file containing the schedule information is attached.
- 6 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.



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.