



# TrainingCentre

## Integration with Outlook Guide



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InterCall, a subsidiary of West Corporation, in partnership with WebEx Communications, Inc., provides TrainingCentre web conferencing services. Because TrainingCentre 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 sessions using Microsoft Outlook. Using Integration with Outlook, you can perform these activities without the need to use the TrainingCentre website.

Integration with Outlook is a plug-in program for Microsoft Outlook, which you download from the TrainingCentre 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 session.

When scheduling a session, 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 a session need not use Integration with Outlook to join the session.

### Integration with Outlook also provides:

- + Quick access to MyWebEx™ on the TrainingCentre website, which includes your personal list of sessions, user profile and other account
- + Quick access to the One-Click Session Wizard on your TrainingCentre website, with which you can set up an instant session that you can start at any time, as often as you want.
- + A template for session invitations, which you can modify with any information you want To provide security for your sessions, Integration with Outlook uses 128-bit SSL (Secure Sockets Layer) encryption for all data it sends to and retrieves from the TrainingCentre website.

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## 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 TrainingCentre website at [www.trainingcentresite.net](http://www.trainingcentresite.net). Before installing Integration with Outlook, ensure that your computer is connected to the Internet and have the following information handy:

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

### To Install Integration with Outlook:

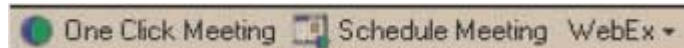
- 1 Quit Microsoft Outlook if it is running on your computer.
- 2 Go to the TrainingCentre website at [www.trainingcentresite.net](http://www.trainingcentresite.net).
- 3 Click on Resource Centre.
- 4 Click on the Outlook Plug-in.
- 5 Save the Setup program to your computer.
- 6 Run the Setup program 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.

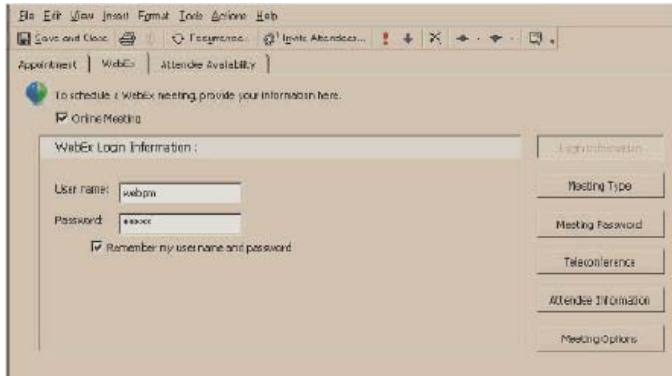


The following table describes the toolbar buttons:

Button	Description
Schedule Session	Opens the Outlook Session window, which now contains Integration with Outlook options for scheduling an online training session.
One-Click Session	Opens the One-Click Session Wizard on the TrainingCentre website, with which you can set up a One-Click Session. A One-Click Session is an instant session that you can start at any time, as often as you want, by clicking a shortcut on your computer.
WebEx	Opens a menu on which you can: <ul style="list-style-type: none"> <li>+ Access your MyWebEx area on the TrainingCentre website.</li> <li>+ Specify your user account information, that is – the URL of your TrainingCentre website and your user name and password.</li> <li>+ Open the template for session invitations and customise the template for your needs.</li> <li>+ Check for updates to Integration with Outlook</li> </ul>

## WEBEX TAB

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



## SPECIFYING YOUR WEBEX ACCOUNT SETTINGS

To schedule an online training session in Outlook or use the One-Click Session feature, you must specify your WebEx account information.

### 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 TrainingCentre 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 TrainingCentre user name.
- 5 In the Password text box, enter your TrainingCentre password.
- 6 Optional. Click Verify to ensure that your account information is correct.
- 7 Optional. To let Outlook log you into TrainingCentre automatically when you schedule a session, select the Remember my user name and password check box.
- 8 Click OK to save your account settings.

## SCHEDULING A SESSION

Before scheduling an online training session using Integration with Outlook, be aware of the following:

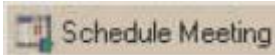
- + Integration with Outlook provides basic options for scheduling a session. Thus, some options that appear in the Schedule Training Session Wizard on the TrainingCentre website are not available in Integration with Outlook.
- + Integration with Outlook does not support all of the recurrence options that are available in Outlook.
- + In any session invitations that you send via Outlook, the session's starting time appears in the time zone that is set on your computer, not in your site preferences for TrainingCentre.
- + On the TrainingCentre website, all session 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 a session on the TrainingCentre website, your computer must be connected to the Internet. Otherwise, Integration with Outlook saves the scheduled session in your Outlook Outbox and automatically schedules the session on your site the next time your computer connects to the Internet.

## SETTING UP A SCHEDULED SESSION

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

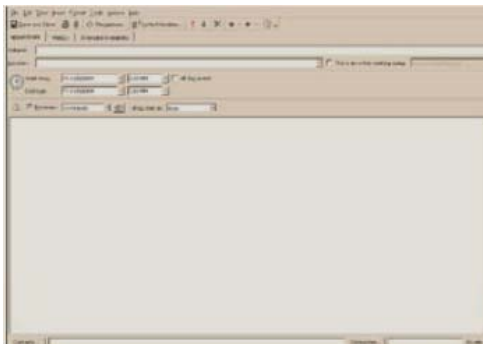
### Start a new meeting or appointment request in Outlook:

- 1 Ensure that your computer is connected to the Internet.
- 2 Do either of the following:
  - Click Schedule Meeting on the toolbar.



- On the Actions menu, click New Appointment.

The Outlook Session window appears.



### Specify general session information:

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

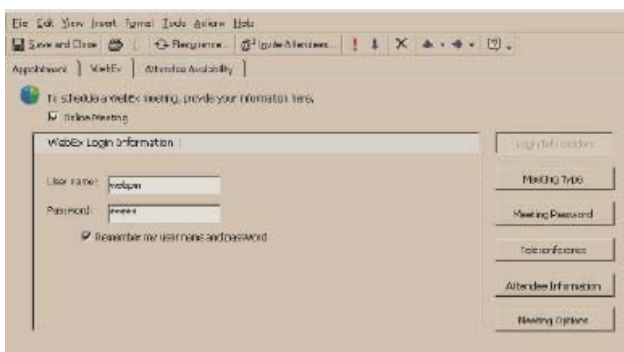
*NOTE: Integration with Outlook supports only the recurrence options that are available on the TrainingCentre website. Optional – On the Appointment tab, specify other options that Outlook provides. For example, you can set reminder options.*

### Invite attendees to the session:

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

### Provide your account information:

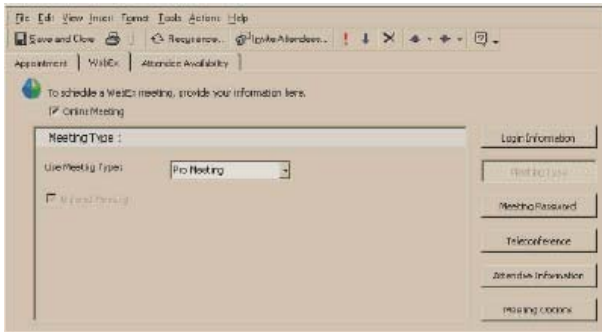
- 1 Click the WebEx tab. The login panel appears.



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

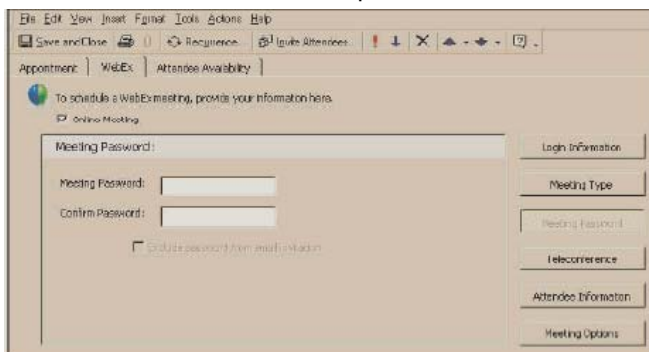
**Specify general session information:**

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



**Specify a Session Password:**

- 1 Click Password. The Password panel appears.
- 2 Specify a password, if applicable, for the session in the Meeting Password box.
- 3 Type the password again, if applicable, in the Confirm Password box.
- 4 Optional – To prevent the session password from appearing in the invitation email messages that attendees receive, select the Exclude session password from email invitations check box.



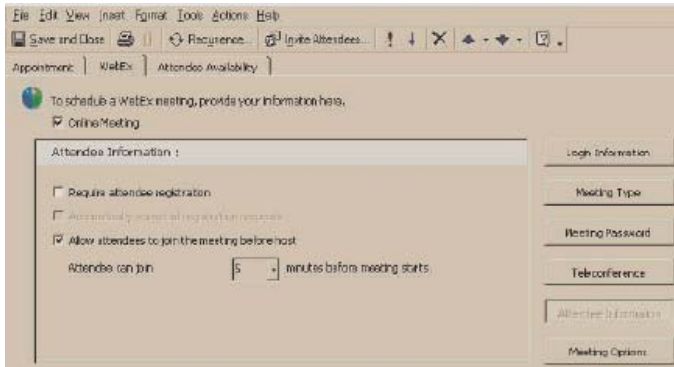
**Setup an InterCall audio conference for the session:**

- 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 session, 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 TrainingCentre websites.*

### Send session invitations:

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

## ABOUT SPECIFYING A RECURRENCE PATTERN FOR A SESSION

Using Outlook recurrence options, you can specify a recurrence pattern for your session. For example, you can specify that a session recurs every Wednesday at 2:00 PM until a specific date. Integration with Outlook schedules the session 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 TrainingCentre website. The following are the recurrence options in Outlook that TrainingCentre 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 a session, you can invite attendees by selecting them in any of your Microsoft Outlook contact lists. For example, if your organisation 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 session, he or she receives an invitation email message. The invitation includes information about the session – including its password (if applicable) – and a link that the attendee can click to join the session. 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 session on the TrainingCentre website.*



## ABOUT THE SESSION TYPES PANEL

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

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

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

- 1 Tracking codes – If your organisation 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 a session. If you require a password, all participants must provide the password to attend the session. Thus, requiring a password helps to secure a session from unauthorised access. If you invite a participant to a session 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 session 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 session invitations that you send to attendees.

## USING AUDIO CONFERENCING OPTIONS

Once you schedule a session, instructions for joining the audio conference automatically appear:

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

## 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 session. An attendee cannot attend the session until you accept his or her registration request. To register for a session, attendees must provide the following information:
  - First name
  - Last name
  - Email address

*NOTE: You can require attendees to provide additional information when registering for a session by editing the session on the TrainingCentre 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 customise your invitation email message with instructions about registering for the session.*

- + **Automatically accept all registration requests:** Accepts all registration requests automatically and lets all registrants attend the session. 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 TrainingCentre website.
- + **Allow attendees to join session before host:** Specifies that participants can join the session a specified number of minutes before the session's scheduled start time.
- + **Attendees can join [x] minutes before session starts:** Specifies the number of minutes before a session's scheduled start time that attendees can join the session

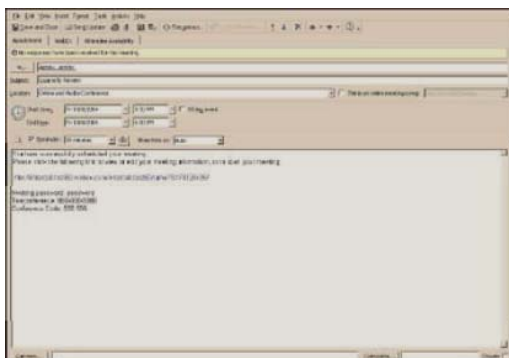
*NOTE: If you let participants join the session early – that is, before its scheduled start time – you can automatically share a presentation once a participant joins the session. This option is useful if you want to share information or entertain participants while they wait for you to start the session.*

## ADDING INFORMATION TO YOUR TRAINING INFORMATION SESSION

If you invited attendees to your session, you can add information to the training session invitation that they receive before you send it. For example, you can provide additional information about the session 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 session on the TrainingCentre website.

### To add information to your session invitation:

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



- 4 Click **Send**.

*NOTE: Ensure that you add information below the session 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 session 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 session on the TrainingCentre website.*

## MODIFYING A SCHEDULED SESSION

Once you schedule a session 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 session, Integration with Outlook sends an updated session invitation to any attendees whom you invited to the session and updates the session information on the TrainingCentre website.

*IMPORTANT: If you modify a session using the TrainingCentre website, your changes do not appear in Outlook. For example, if you change the session'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 a session.*

### To modify a scheduled session:

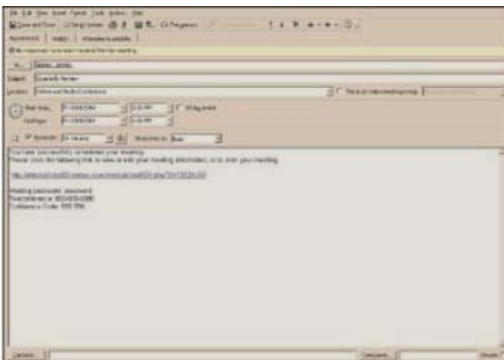
- 1 On your Microsoft Outlook calendar, open the item for the scheduled session.
- 2 Modify the information and options on either the Appointment tab or WebEx tab.
- 3 Click Send Update.

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

## STARTING A SESSION

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

- + On your Microsoft Outlook calendar, open the session item then click the link to start the session.
- + Log in to your TrainingCentre website and then start the session from your My WebEx Sessions page.



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

## CANCELLING A SESSION

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

*NOTE: If you cancel a session using the TrainingCentre website, your site does not automatically cancel the session on your Outlook calendar. Thus, InterCall recommends that you cancel sessions using Outlook instead of the TrainingCentre website.*

## CUSTOMISING THE SESSION INVITATION TEMPLATE

Integration with Outlook provides a template for session 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 template includes both default text and variables – codes that your session service recognises and substitutes with your specific session information. You can customise this template by editing the default text, rearranging variables and removing variables.

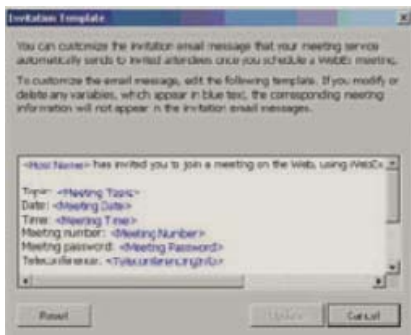
The default session invitation template provides the following variables:

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

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

### To customise the session 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 session 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.
- 3 Click Reset.



## JOIN A SESSION

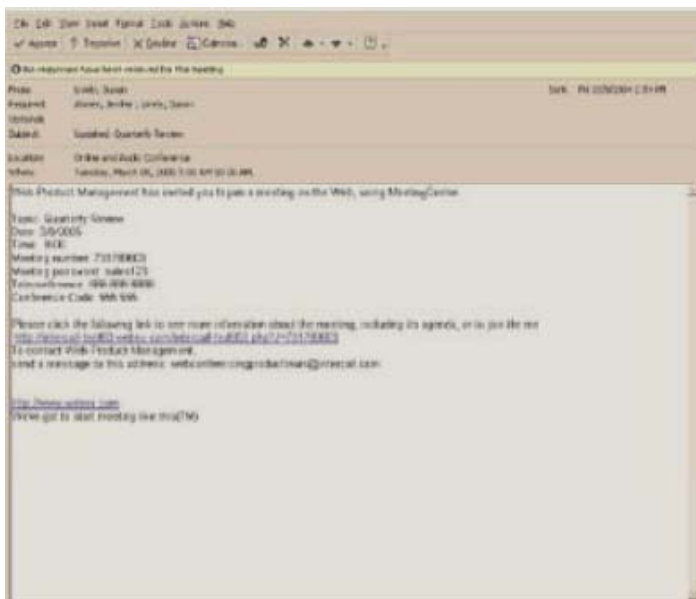
If a session host uses Integration with Outlook to invite you to a session, you receive an invitation email message that includes a link that you can click to join the session. The invitation differs depending on whether or not you use Microsoft Outlook.

## JOINING A SESSION 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 session, open the invitation on your calendar and then click the link to join the session.

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



## CHECKING FOR UPDATES TO INTERGRATION

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.