

InterwiseConnect™

Implementation Guide for the Interwise Outlook AddIn

Version 7.2

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Introduction

The Interwise Outlook AddIn enables users to schedule, manage and join Interwise Events through Microsoft Outlook.

This guide describes how to configure and customize the Outlook AddIn to meet your organization's requirements, and is split into two main sections:

- ◆ **ICC Settings:** This section describes the initial steps in configuring the Outlook AddIn. For example, users wanting to work with the AddIn must have an account on the ICC *and* the relevant permissions.
- ◆ **Customizing the Outlook AddIn:** This section describes how to customize the Outlook AddIn by modifying the AddIn configuration file (**config.ini**). A number of features can be enabled/disabled, made visible or invisible to the user and so on.

For information on how to schedule, manage and join Interwise Events using the Outlook AddIn, refer to the *Working with Outlook* guide.

System Requirements

This section details the system requirements in order to work with the Interwise Outlook AddIn.

- ◆ **Microsoft Exchange Server:** Microsoft Exchange Server 2000 or 2003.
- ◆ **ICC:** Minimum ICC version required is **6.0** and above. Note that if you work with an ICC that is V6.0, new functionality added in V7.0 will not be enabled.
- ◆ **Client:**
 - **Operating System:** Windows 2000, XP and 2003. Note that the latest Service Pack for each of the mentioned operating systems must be installed.
 - **Microsoft Office version:** Office 2000, XP, 2003. Note that the latest Service Pack for each of the mentioned Office versions must be installed.
 - **Microsoft Outlook configuration:** Exchange mode.
 - **Installing Outlook AddIn:** Users must have admin rights on the machine in order to be able to install the Interwise Outlook AddIn. Note that non-admin users can work with the AddIn once installed (by a user with admin rights).



Notes:

- Version 6.0 and above of the Interwise Outlook AddIn is not compatible with versions prior to 5.2.
- Working in a mixed environment (versions 5.2 with 6.0 and above) is not recommended.
- If users have a version prior to 5.2 installed they must un-install the AddIn and install the new version.

ICC Settings

This section describes the settings you should define in the ICC in order for users to begin working with the Outlook AddIn.

This section includes the following:

- ◆ **Create Users in the ICC**, see below
- ◆ **Define User Authentication Method**, page 7
- ◆ **Default Event Settings**, page 8
- ◆ **Define the Mail Invitation sent to Users**, page 9

Creating Users in the ICC

The first step in ensuring that users can work with the Outlook AddIn is to make sure that they have an account in the ICC *and* have the relevant permissions. When a user then schedules, updates, deletes or joins an Interwise Event using the Outlook AddIn, their details must be authenticated (see the following section) using the details stored in the ICC in order to verify that they have the required permissions to perform one of the specified actions (schedule, update, delete or join the Event).

There are several ways to create users in the ICC, such as the Import feature in the ICC or by synchronizing with your organization's Directory Services. It is important to note that the user details that are used in order to authenticate the user must be identical to the details used when creating the user. It is especially important that the user's email in the ICC exactly matches their *primary* email (which is indicated by 'SMTP' in uppercase characters) defined in the Exchange server.

Defining User Authentication Method

You can determine whether this authentication is according to the user's email address or the user's ICC user name and password.

➤ **To define the authentication mode:**

- 1 From the Navigation bar on the left of the ICC Home Page, click **System Management>Application Parameters**.
- 2 Expand the list of Application Parameters and then click **API>Outlook Authentication**. The following window is displayed:

Entries in API/Outlook Authentication			
Group	Sub Group	Key	Value
API	Outlook Authentication	Exchange email address	1
API	Outlook Authentication	ICC username and password	0

Figure 1: API / Outlook Authentication Entries

- 3 Define the authentication mode to be used:
 - **Exchange email address:** Click on the Value link to enter one of the following values:
 - 1 = users are authenticated via the email address (the primary email address, which is indicated by 'SMTP' in uppercase characters) stored on the Outlook Exchange Server.
 - 0 = users CANNOT be authenticated via the email address stored on the Outlook Exchange Server.
 - **ICC user name and password:** Click on the Value link to enter one of the following values:
 - 1 = users are prompted to enter their ICC user name and password in the *Authentication* window (as shown below).
 - 0 = users are NOT prompted to enter their ICC user name and password in the *Authentication* window.



Note: If you define **1** for both the **Exchange email address** and **ICC user name and password**, Outlook first attempts to authenticate the user with their email address. If this fails (for example, if the user is registered with a different email address in the ICC), then the *Authentication* window is displayed.

If both options are set to **0**, users will not be able to schedule Events using the Outlook AddIn.

Authentication Window

When the user is required to enter their ICC user name and password, the *Authentication* window is displayed, as shown below.



Figure 2: Authentication Window



Note: Before distributing the Outlook AddIn, you can configure the window to display/hide the **Remember my user name and password** checkbox, as described in the *Customizing the Outlook AddIn* section.

Default Event Settings

When a user schedules an Event using the Outlook AddIn they can modify default Event settings (such as the preferred audio device and recording settings) via the **Customize Event Settings** button in the Outlook form.

The default Event settings are retrieved from the ICC and can be changed by the ICC System Manager (as described in the *Administrator Guide*).

If the user does not modify Event settings, the Event will be created on the ICC according to the default Event settings defined.

Defining the Mail Invitation sent to Users

When creating an Event using the Outlook AddIn, by default an 'Invitation template' is retrieved from the ICC and embedded in the body of the meeting request. Alternatively, the Outlook AddIn can be configured to work with a local email template (as described on page 19).

In order to edit the default ICC email template, select the **Outlook AddIn Invitation for Open Event** template. The ICC System Manager can change the default email template by clicking **System Management>Email Templates** in the Navigation bar in the ICC, and then selecting the relevant Outlook template.

The following table lists the template tags supported in the Outlook AddIn email template. Note that selecting any tag that is not listed in the table below will result in corrupted text (such as <Iwdata>) included in the body of the invitation.

For further details on how to work with Email Templates, see *Chapter 8, Additional Administrator Tools*, of the *Administrator Guide*.

Email Template Tag Name	Description
<Admin first name>	Displays the organizer's first name.
<Admin last name>	Displays the organizer's last name.
<Event type>	Displays the Event type (such as iMeeting).
<Enter Event on the fly user>	Displays the generic Event Entry link (non-personalized link).
<Getting Ready anonymous user>	Displays the link to the 'Getting Ready for an Event' page on the ICC.
<Guest audio instructions>	Displays the link to the audio instructions for the specific Event, including the Gateway access numbers.

Email Template Tag Name	Description
[Change Tap]	Displays the link to the 'Change Telephone Password' page on the ICC. Note: This tag is not included in the email template tag list and should be manually entered exactly as shown.
<iMeeting code>	Displays the Event number of the specific Event (for users entering the Event using their telephone only).
[DialIn]	Displays the link to the generic Dial-in Instructions page (for users joining the Event with their telephone). Note: This tag is not included in the email template tag list and should be manually entered exactly as shown.

Customizing the Outlook AddIn

The Outlook AddIn can be customized according to your requirements. A number of features can be enabled/disabled, made visible or invisible to the user and so on, all via modifying the relevant parameters in the configuration file (**config.ini**). Once you have completed customizing the Outlook AddIn you can then distribute it to your users.

Note that the AddIn file can be customized according to your requirements. For further information, contact Interwise Support.

This section describes the main customization options currently available, including:

- ◆ **Getting Started**, see below
- ◆ **Remember User Name and Password**, page 13
- ◆ **Define the Displayed Server List**, page 13
- ◆ **Display AddIn Toolbar Buttons, Menu Items and Tabs**, page 14
- ◆ **Working with a Local Email Template**, page 19
- ◆ **Install the Outlook AddIn on Different Language Versions of Microsoft Office**, page 20

Getting Started

In order to customize the Outlook AddIn before distribution, perform the following steps:

- 1** In the uncompressed MSI package of the Outlook AddIn, locate the **config.ini** file: Uncompressed\Program Files\Interwise\Outlook.
- 2** Before modifying the **config.ini** file, you should make sure the file is not Read-only (right-click the file, select **Properties** and in the displayed window, clear the Read-only checkbox).
- 3** Change any settings as described in this section, according to your requirements.

- 4 Save **config.ini**.
- 5 You can either pack the MSI package into a standalone compressed package (see below) or distribute the uncompressed package ‘as is’ (including the folders that are released with the package).

Packing an Uncompressed MSI Package of the Outlook AddIn

The following procedure describes how to build a compressed MSI package (single file) out of the uncompressed package of the Outlook AddIn. The procedure is required when customizing the installation package requires the modification of one of the files (such as **Config.ini**) before deploying the package.

- 1 The provided batch and .vbs files, supplied in the Pack folder, will automatically pack the Outlook AddIn to a single .msi file.
- 2 Copy the **WiFilVer.vbs**, **WiMakCab.vbs** and **CompressedOA.bat** files to a temporary folder (such as C:\Temp).
- 3 Copy the content of the Uncompressed folder of the Outlook AddIn to the same temporary folder (C:\Temp in the example above) as shown below:

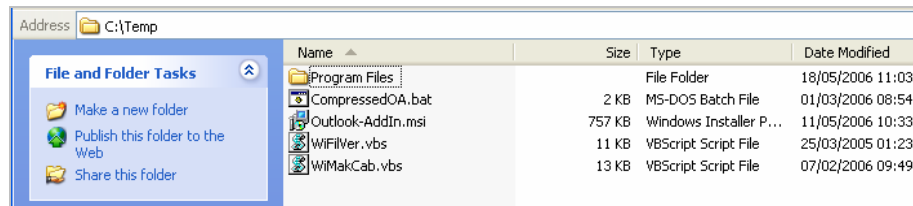


Figure 3: Copying to Temp Folder

- 4 Double-click the **CompressedOA.bat** file to create a new and compressed **Outlook-AddIn.msi** file.
- 5 Test the new package to verify that the process completed successfully.

Remembering User Name and Password

Set whether or not to display the **Remember my user name and password** checkbox in the *Authentication* window, as shown on page 8.

`<StoreUserCredentials Enabled="True"/>` - display the **'Remember my user name and password'** checkbox

`<StoreUserCredentials Enabled="False"/>` - do not display the **'Remember my user name and password'** checkbox

Defining the Displayed Server List

Preset the list of ICCs to be displayed to the user when they are scheduling the Event (valid for clean installations when there are no ICC servers already defined in the preferences), and also indicates the default ICC to be selected. Note that you can also leave the list of servers empty or enable/disable this field, as described in the following section.

`<ICCServers>`

`<ICCServer Default="True">http://internal.interwise.com/ep </ICCServer>`

`<ICCServer>http://demo.interwise.com/demo</ICCServer>`

`<ICCServer>http://example1.interwise.com/example</ICCServer>`

`</ICCServers>`

Enabling/Disabling the ICC URL

Define whether the ICC URL on the iMeeting form is editable or not. The image below shows the ICC URL disabled (when the parameter is set to **False**).

`<ICCURL Enabled="True" />` - ICC URL field is editable

`<ICCURL Enabled="False" />` - ICC URL field is not editable

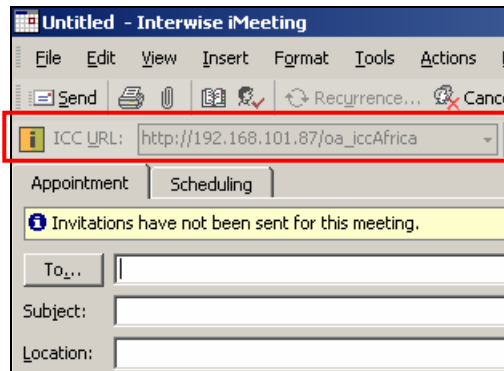


Figure 4: ICC URL Disabled

Displaying AddIn Toolbar Buttons, Menu Items and Tabs

You can choose whether to display a number of different Outlook AddIn toolbar options and menus, including the following:

- ◆ Customize Event Settings button
- ◆ Display tabs in the *Customize Event Settings* window
- ◆ Interwise Options button and its menu items (*Preferences, Help, About Interwise AddIn*)
- ◆ New Interwise Event button

Displaying the Customize Event Settings button

Define whether the Customize Event Settings button on the iMeeting form is displayed or not.

`<EventSettingsCustomize Enabled="False" />` - the button is not displayed

`<EventSettingsCustomize Enabled="True" />` - the button is displayed

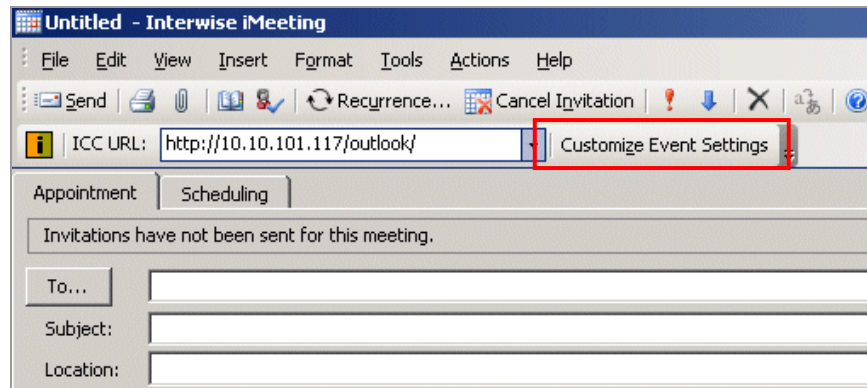


Figure 5: Customize Event Settings Button Displayed

Displaying tabs in the Customize Event Settings window

You can also determine which of the tabs available (the **Audio**, **Materials** and **Options** tabs) are displayed in the *Customize Event Settings* window.

➤ To display the Audio tab:

To display the Audio tab in the *Customize Event Settings* window set Audio as true (see below) in the `<EventSettingsRestrictions>` section:

```
<EventType ID="8" Name="iMeeting" MaxUsers="100">
    <Audio Enabled="True" /> - Audio tab is displayed
    <Materials Enabled="True" />
    <Options Enabled="True" />
</EventType>
```

➤ To display the Options tab:

To display the Options tab in the *Customize Event Settings* window set Options as true (see below) in the `<EventSettingsRestrictions>` section:

```
<EventType ID="8" Name="iMeeting" MaxUsers="100">  
    <Audio Enabled="True" />  
    <Materials Enabled="True" />  
    <Options Enabled="True" /> -- Options tab is displayed  
</EventType>
```

Displaying and Renaming the Interwise Options button

This section describes how you display and rename the Interwise Options button.

➤ To display the Interwise Options button

Define whether the Interwise Options button on the Outlook toolbar is displayed or not.

`<SetupMenuRestrictions Enabled="False" Caption="Interwise Options">` - the Interwise Options buttons is NOT displayed.

`<SetupMenuRestrictions Enabled="True" Caption="Interwise Options">` - the Interwise Options buttons is displayed:



Figure 6: Interwise Options Button Displayed

When selected to be displayed, you can also define whether or not to include the *Preferences* and *Help* menu items (the *About Interwise AddIn* menu item is displayed automatically if the `<SetupMenuRestrictions Enabled>` parameter is set to `True`), as described below.

➤ **To rename the Interwise Options button:**

`<SetupMenuRestrictions Enabled="True" Caption=" Options">` - the button will be displayed and named as "Options" see below.

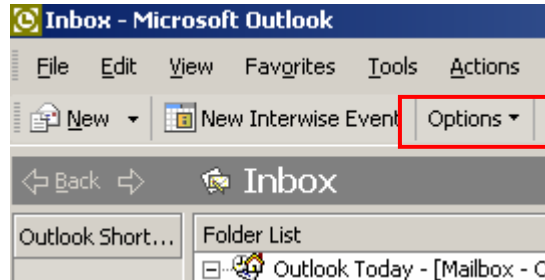


Figure 7: Interwise Options > Renaming Options Button

➤ **To display the Preferences menu item for ICC management:**

`<Preferences Enabled="True">` - Preferences menu is displayed

`<AvailableServers Enabled="True"/>`

`</Preferences >`

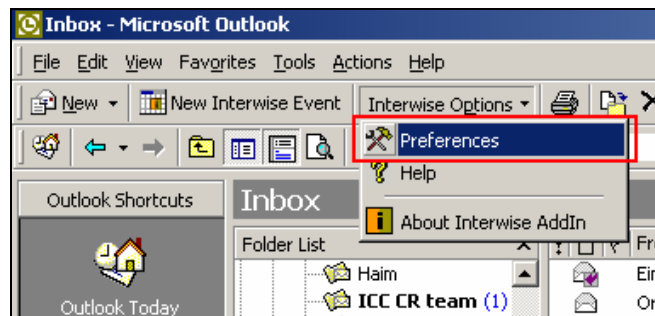


Figure 8: Interwise Options > Preferences Menu Item Displayed

➤ **To display the Help menu item:**

`<Help Enabled="True"/>` - Display the Help menu

➤ **To define the default ICC to use the Help:**

Define the URL of the ICC to use to display the help files. Note that this value is only relevant if there are no user defined servers; if there are, the help will be taken from the defined server.

```
<Misc>  
  
<DefaultHelpFileICCURL>http://systemcheck.interwise.com/systemcheck  
</DefaultHelpFileICCURL>  
  
</Misc>
```

Displaying and Naming the New Interwise Event button

This section describes how to display and rename the New Interwise Event button.

➤ **To display the New Interwise Event button:**

```
<NewInterwiseEventButton Enabled="True" Caption="New Interwise  
Event"></NewInterwiseEventButton>
```

 - New Interwise Event button is displayed.

```
<NewInterwiseEventButton Enabled="False" Caption="New Interwise  
Event"></NewInterwiseEventButton>
```

 - New Interwise Event button is not displayed.

➤ **To rename the New Interwise Event button:**

```
<NewInterwiseEventButton Enabled="True" Caption="Interwise  
"></NewInterwiseEventButton>
```

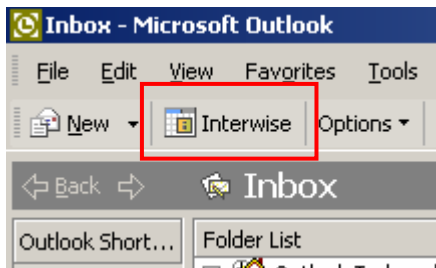
 - The caption of the button is "Interwise"

Figure 9: New Interwise Event Button

Working with a Local Email Template

In order to configure the Outlook AddIn to work with a local template before distribution, perform the following steps:

- 1 Change the following registry key value to 1 in the *Registry* table before deploying the MSI package:
HKEY_LOCAL_MACHINE\SOFTWARE\InterWise\Outlook\MasterTemplate.
- 2 In the uncompressed MSI package of the Outlook AddIn (Uncompressed\Program Files\Interwise\Outlook), locate the **iMeetingOpenTemplate.txt** file.
- 3 Edit the template according to your requirements (see the following section).
- 4 Save the **iMeetingOpenTemplate.txt** file.
- 5 You can either pack the MSI package into a standalone compressed package or distribute the uncompressed package ‘as is’ (including the folders that are released with the package).

Editing the Template

The following table lists the template tags supported in the Outlook AddIn email template, the values themselves will be generated according to the user’s and Event’s specific information.

Email Template Tag Name	Description
[Admin first name]	Displays the organizer’s first name.
[Admin last name]	Displays the organizer’s last name.
[Event type]	Displays the Event type (such as iMeeting).
[Event Entry]	Displays the generic Event Entry link (non-personalized link).
[Getting Ready]	Displays the link to the ‘Getting Ready for an Event’ page on the ICC.

Email Template Tag Name	Description
[Guest audio instructions]	Displays the link to the audio instructions for the specific Event, including the Gateway access numbers.
[Change Tap]	Displays the link to the 'Change Telephone Password' page on the ICC.
[Event ID]	Displays the Event number of the specific Event (for users entering the Event using their telephone only).
[DialIn]	Displays the link to the generic Dial-in Instructions page (for users joining the Event with their telephone).

Installing the Outlook AddIn on Different Language Versions of Microsoft Office

The Outlook AddIn can be installed on any Office language version, however the AddIn interface will be in English.

Working with Delegate Access / Share Calendar

Using the Interwise Outlook AddIn, users can also work with core Outlook features such as Delegate Access and Share Calendar (though with some prerequisite conditions, as described on the following pages).

◆ **Delegate Access:**

“With the Delegate Access feature in Microsoft® Outlook® you can allow someone else to manage all the functions of your calendar.” *From Microsoft Outlook Help*

◆ **Share Calendar:**

Sharing allows you to share your calendar with others or view other people’s shared calendars. You can also define the permissions level you would like to use for calendar sharing. For example, whether others can only see your calendar or if they can also create calendar entries.

For further information about these two Outlook features, refer to the Microsoft Outlook Help or the Microsoft Office website (<http://office.microsoft.com>).

Working with Interwise Events in Delegate Access or Shared Calendar Mode

This section describes how the Interwise Outlook AddIn works with core Microsoft Outlook functionality; namely the managing of Interwise meetings on someone else’s calendar. In Outlook this is achieved either by sharing the calendar with a user assigned the relevant permissions or by delegating access to someone else (see the descriptions in the previous section).

Note that the core Outlook delegate access and share calendar features support a variety of different permission settings. However, for Interwise meetings the only relevant permissions are those that allow you to manage meetings on behalf of somebody else (as listed in the procedure below), all other permissions are irrelevant for Interwise meetings.

The following procedure describes how to work with the delegate access or shared calendar mode for Interwise Events:

1 Define the delegation or sharing settings for the relevant users.

Interwise recommends you set one of the following permissions levels when sharing a calendar between two users (for example, User A and User B) or when delegating access to another:

- Owner
- Editor
- Author
- Publishing Author
- Publishing Editor

The image below shows how to define shared calendar settings.

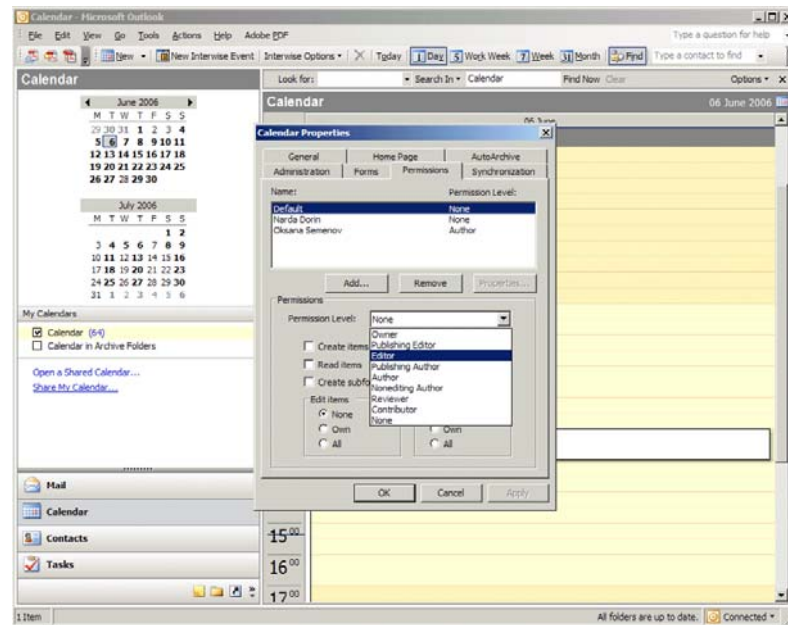


Figure 10: Sharing the Calendar

The image below shows how to define delegate access settings.

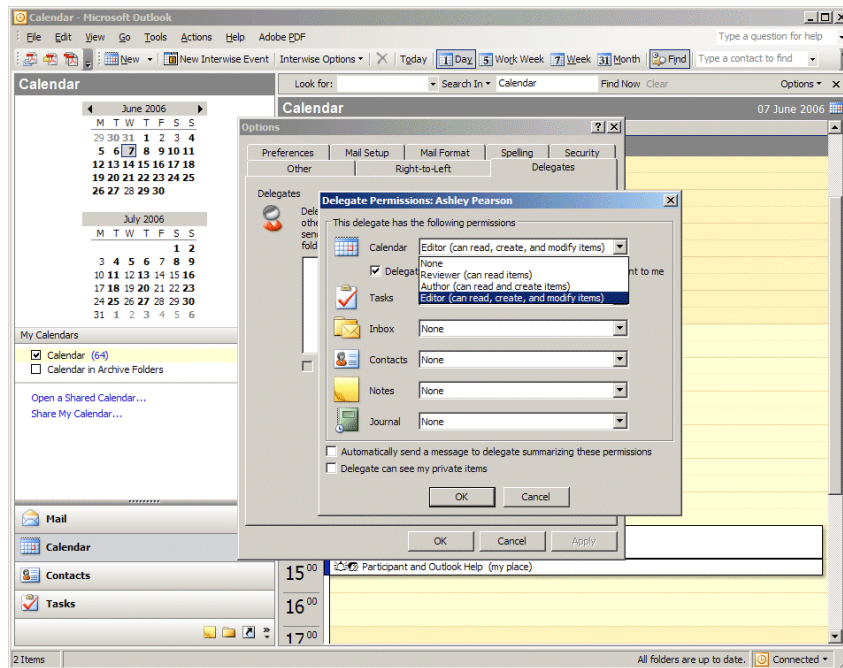


Figure 11: Delegating Access

- 2 Ensure that the Interwise Outlook AddIn is installed on both users' computers.
- 3 Create valid user accounts with the relevant permissions in the ICC for the users. For example, for User A and User B.
- 4 Define the user authentication method:
 - **ICC authenticates user's Exchange email account:** In this case, User B opens User A's calendar to create an Event and User B's email is authenticated in the ICC (as User B is actually creating the Event). However, the Event is created in the ICC under User A's name as they are the Event owner (the Event is actually being created on User A's calendar). Therefore, User A's Exchange email account is also authenticated in the ICC before the Event is created.

- **ICC authenticates using ICC username and password:** In this case, User B opens User A's calendar to manage an Event and User B is prompted to enter their ICC username and password in order to be authenticated in the ICC (as User B is actually creating the Event). However, the Event is created in the ICC under User A's name since they are the Event owner (the Event is actually being created on User A's calendar). Therefore User A's ICC account is also authenticated before the Event is created *and* User A's Exchange email account is also authenticated.

Note that when the authentication method uses the ICC username and password, the delegate (the user that delegates the access, which in the examples above was User A) is always authenticated using their Exchange email.

- 5 Once the meeting is scheduled it is sent to the invitees as a regular Outlook meeting from User A.

From this point on, User A can manage and join this Event from their calendar (since they are the Event owner). Alternatively, User B can continue to manage this Event (and join it) by accessing User A's calendar.



Note: When creating/updating/deleting an Event, the process is the same as described above for regular or recurring Events.

Outlook AddIn Log Files

Outlook AddIn log files are located under \Application Data\ Interwise\Outlook. You can modify the default path of the log files, as described in the procedure below.

If there are any problems with the Outlook AddIn these logs should be forwarded to Interwise Support.

➤ **To change the default logs folder path:**

Open the **Outlook-AddIn.msi** file and modify the registry key **registry12147** (the *Name* is **LogFolderPath**) in the *Registry* table with the relevant value, as shown in the table below:

Value	Description
<path>	The path to where the Outlook AddIn will write its log files. By default the path is %appdata%\Interwise\ Outlook. The path supports the use of environment variables that are supported by the local OS (i.e. %programfiles%).

Core Outlook Features NOT Supported

This section includes a description of all the major Outlook core features which are NOT supported for Interwise Meetings.

- ◆ **Copying Interwise Meetings:** This capability is not supported, because Outlook does not include the functionality for “sending” an update upon the pasting of appointments and meetings.
- ◆ **Moving to Folders:** The capability to move Interwise meetings to folders, for example by dragging them from the Deleted or Sent Items folder to the Calendar, is not supported.
- ◆ **Cross Updating:** Managing meetings in the ICC which were originally created in Outlook is not supported. Interwise believe a single point of management is necessary: if the Event was originally created in Outlook it should be managed using Outlook (for subsequent updates, deletions, and so on).
- ◆ **Standard Toolbar Customize Options:** The renaming of Interwise buttons, the changing of image/location, and other standard toolbar customization options (as shown below), is not supported.

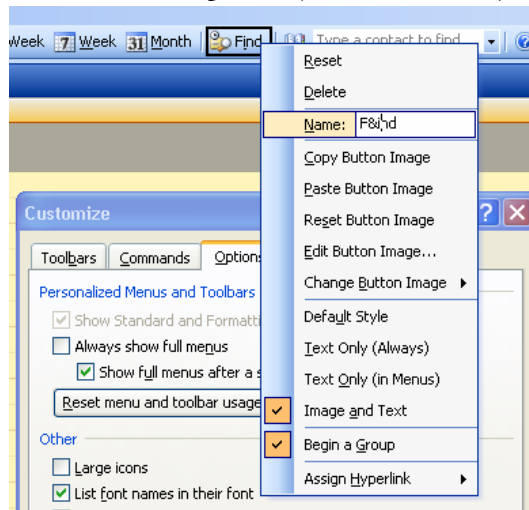


Figure 12: Customizing Toolbar

- ◆ **Multiple Interwise Meetings:** Working with multiple Interwise Meetings is not supported (for example, the selection of several Meetings on the calendar and deleting/updating at once).
- ◆ **Recovering Meetings:** The Outlook feature to recover a meeting after it was deleted is not supported for Interwise Meetings. Once the Meeting is deleted it is deleted from the ICC and is no longer an Interwise Meeting (the body is cleaned, and all Interwise flags are removed). Therefore, when a user recovers such a meeting it will *no longer* be an Interwise Meeting.
- ◆ **Working with Single Occurrence of Recurring Meeting on Calendar:** Actions such as moving the occurrence of a recurring Meeting on the calendar, expanding/shrinking an occurrence, or deleting an occurrence on the calendar have limited support. All work on an occurrence of a recurring Meeting should be done from within the form, meaning open the form and then update/delete.