

InterwiseConnect™

Working with Outlook

Version 7.2

Legal Notices

- Information in this document is subject to change without notice and does not represent a commitment on the part of Interwise, Inc.
- The software and/or databases described in this document are furnished under a license agreement or nondisclosure agreement. The software and/or databases may be used or copied only in accordance with the agreement. The purchaser may make one copy of the software for backup purposes.
- No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, or information storage and retrieval systems, for any purpose other than the purchaser's personal use, without the express written permission of Interwise, Inc.
- Unless otherwise noted, all names of companies, products, street addresses, and persons contained herein are part of a completely fictitious scenario or scenarios and are designed solely to document the use of an Interwise product.
- Interwise Connect – Working with Outlook Guide, document number V7.2, issued on June 30, 2006.
- Windows is a trademark of Microsoft Corporation. All other trademarks belong to their respective owners.
- © Interwise, Inc. 1994-2006. All rights reserved.

Table of Contents

Introduction	4
Installing the Outlook AddIn	5
Scheduling iMeeting Events.....	7
Scheduling an iMeeting.....	7
Scheduling a Recurring iMeeting.....	9
Converting a scheduled Outlook meeting into an Interwise iMeeting	11
Customizing Event Settings for an Event.....	11
Customizing Event Audio Settings.....	12
Customizing Event Options	14
Customizing Event Settings for Recurring Events	17
Working with the Delegate Access / Shared Calendar Features.....	19
Modifying Outlook AddIn Options	20
Adding or Deleting ICCs	20
Changing the Default ICC	22
Receiving Invitations to Events.....	23
Viewing Interwise Events in your Outlook Calendar.....	24
Joining Events	25
Updating iMeeting Events.....	26

Introduction

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

After installing the Outlook AddIn, you can:

- ◆ Schedule and enter an Interwise Event.
- ◆ Easily convert already scheduled Outlook meetings into Interwise Events.
- ◆ View your scheduled Interwise Events in the Outlook Calendar, as per regular Outlook meetings.
- ◆ Modify Outlook AddIn settings per Event to suit your own personal requirements (such as allowing Event attendees to use their telephone or a headset/microphone and speakers for their audio during an Event).



Note: The Interwise Outlook AddIn is compatible with Office XP, 2000 and 2003. Note that the latest Service Pack for each of the mentioned Office versions must be installed.

Installing the Outlook AddIn

The first step in getting your Microsoft Outlook Calendar to work with Interwise Events is to install the Outlook AddIn. The following procedure describes how to install the Outlook AddIn

➤ **To install the Outlook AddIn:**

- 1 Locate the **Outlook-AddIn.MSI** file and double-click on it to launch the installation wizard. The *Welcome* window is displayed.



Tip: If you have Outlook open on your computer, you must first close Outlook before proceeding with the installation.

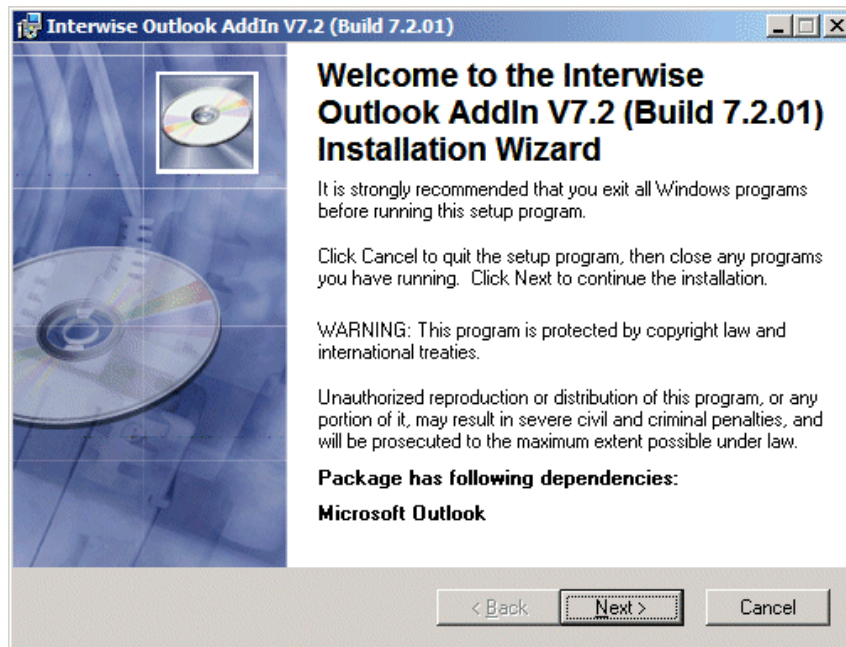


Figure 1: Welcome Window

- 2 Click **Next**. The *License Agreement* window is displayed.
- 3 Click **Yes**. The *Destination Folder* window is displayed.
- 4 Click **Next** (or select a destination folder by clicking **Browse**, and then click **Next**). The *Ready to Install* window is displayed.

- 5 Click **Next**. The setup files are copied to your computer. Upon completion, the *Successfully Installed* window is displayed.

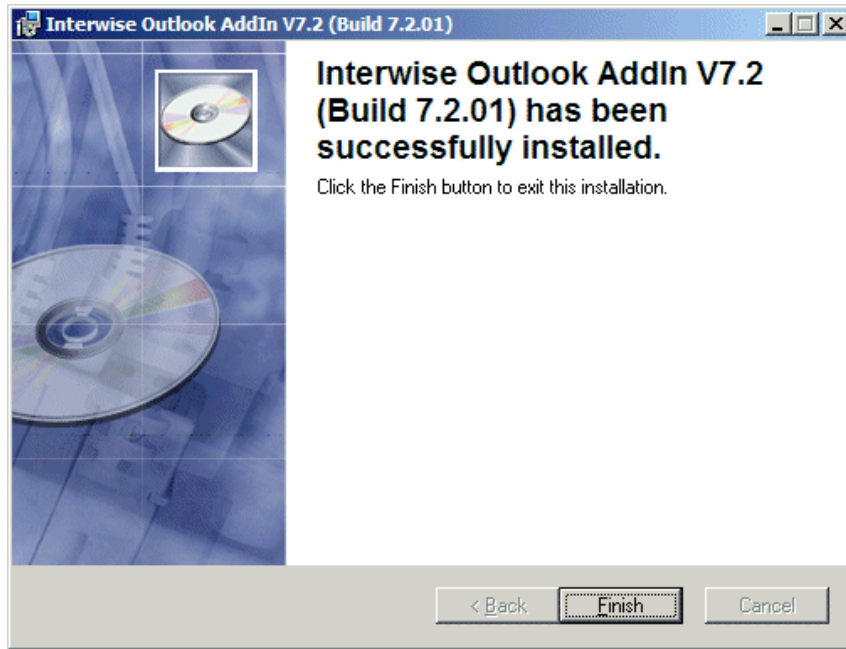


Figure 2: Successfully Installed Window

- 6 Click **Finish**. The Outlook AddIn is installed on your computer.

Scheduling iMeeting Events

The Interwise Outlook AddIn enables you to work through Microsoft Outlook to schedule, manage and join Interwise Events. The same Events scheduled/updated in Outlook are simultaneously scheduled/updated in the Interwise Communications Center (ICC), an Interwise web application.

This section includes the following:

- ◆ **Scheduling an iMeeting**, see below
- ◆ **Scheduling a Recurring iMeeting**, page 9
- ◆ **Converting a scheduled Outlook meeting into an Interwise iMeeting**, page 9
- ◆ **Customizing Event settings for an Event**, page 11
- ◆ **Customizing Event Settings for Recurring Events**, page 17
- ◆ **Working with the Delegate Access / Shared Calendar Features**, page 19

Scheduling an iMeeting

This section describes how to schedule a new iMeeting Event.



Note: For information about scheduling a recurring iMeeting, see page 9.



To schedule an iMeeting Event:

- 1 From the Outlook toolbar, click .

Note that Interwise provides many other ways to schedule an Interwise iMeeting, such as by selecting **New** from the *File* menu and then clicking **Interwise Event**, OR by selecting a block of time in your Calendar and then right-clicking and selecting **New Interwise Event**.

The following window is displayed:

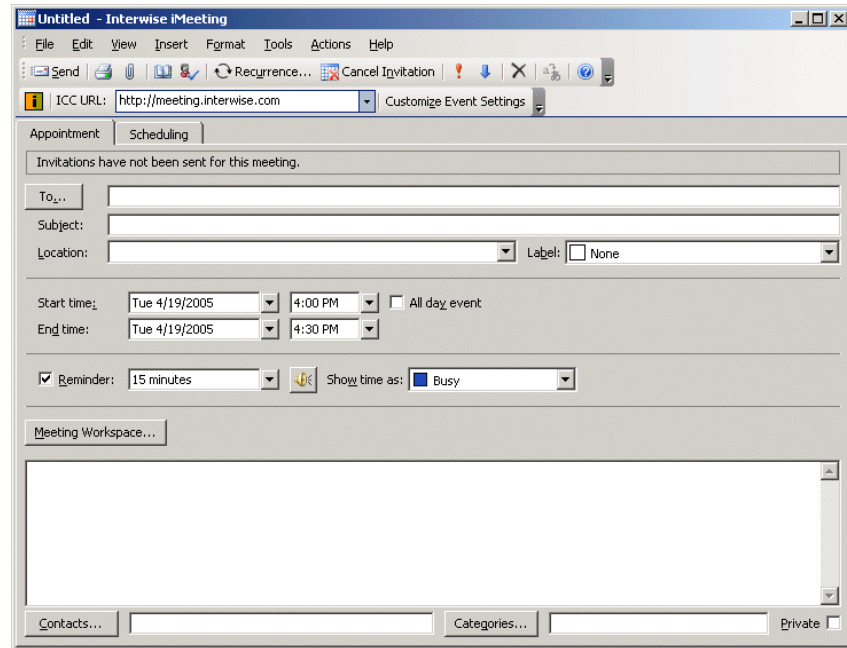


Figure 3: iMeeting Event in Outlook

- 2 If you want to change the location displayed in the ICC URL box, select a URL from the dropdown list (the dropdown list displays a list of ICC URLs that were defined in the *Preferences* window, as described on page 20) or type in the required URL. For example, enter 'http://demo.interwise.com/events'. This option may be disabled by your organization.



Note: You can also change the default ICC URL, as described on page 22. The default ICC URL is the URL automatically displayed when you first open an Outlook form to schedule an Event (as shown in Figure 3).

- 3 In the **Appointment** tab, define the following:
 - Select the relevant iMeeting invitees (as you would normally select mail recipients).
 - In the Subject line, enter the Event name.
 - Define the Start and End times and any other settings specific to your Event.

- 4 In the **Scheduling** (or **Attendee Availability** if you are working with Windows 2000) tab, you can determine the availability of any of the invitees, as you would normally do when creating a meeting through Outlook.
- 5 You can modify additional Event settings via the **Customize Event Settings** button. The settings initially displayed are based on the default settings of the ICC you selected in step 2. See page 11 for further information.
- 6 Click **Send**. You may be prompted to enter your ICC user name and password, according to how the Outlook AddIn has been configured by your system administrator.

The selected invitees are notified accordingly of the iMeeting Event with invitation information generated by the Interwise system, which is included in the body of the invitation. This invitation information includes all the relevant details with which the invitees can access the Event.

Scheduling a Recurring iMeeting

Using Outlook's recurrence feature, you can schedule a recurring iMeeting.

➤ To schedule a recurring iMeeting Event:

- 1 In the Calendar view, right-click on the Calendar and in the displayed popup menu, select **New Interwise Recurring Event**,
OR,

In the Calendar view, from the Outlook menu bar, click **Actions>New Interwise Recurring Event**.

The Outlook form is displayed with the *Appointment Recurrence* window superimposed on it, as shown below.

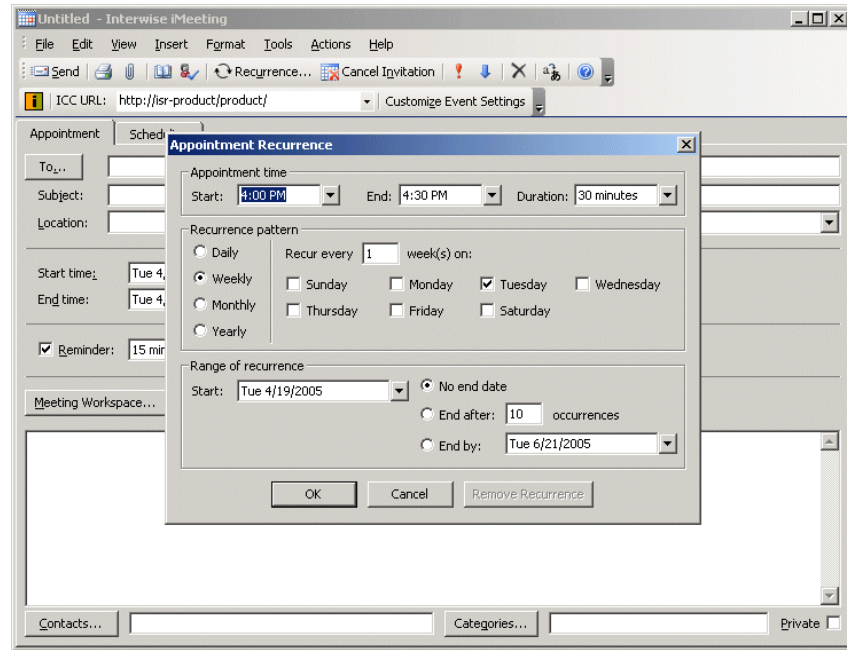




Figure 4: Recurring iMeeting Event in Outlook

- 2 Define your recurring settings, including the time, pattern and range and then click **OK**.
 - 3 Define your Event settings, as described in the *Scheduling an iMeeting* section.
 - 4 Click **Send**. You may be prompted to enter your ICC user name and password, according to how the Outlook AddIn has been configured by your system administrator.
-  **Note:** You will only be able to view the upcoming week's recurring Events in the ICC. For example, if you created an Event to recur weekly, with the first instance scheduled for the current week, when you access the ICC only this first Event will be displayed.

Converting a scheduled Outlook meeting into an Interwise iMeeting

This section describes how to easily convert an already scheduled Outlook meeting into an Interwise iMeeting.

- **To convert a scheduled Outlook meeting to an Interwise Event:**
- 1 Display the Outlook Calendar.
 - 2 Locate and double-click the Event you want to convert.
 - 3 In the displayed Outlook form, click  **Make this an Interwise Event**.
 - 4 Define any Event settings, as required (see the *Creating an iMeeting* section for further information).
 - 5 Click **Send Update**. The selected invitees will receive an updated email invitation with all the relevant information required to access the Event.

Customizing Event Settings for an Event

When scheduling and/or updating Interwise Events you can customize a number of default settings, including the following:

- ◆ **Event Audio**, see below
- ◆ **Event Options**, page 14

If you want to customize the settings for Recurring Events (whether a single occurrence or the entire series), refer to the *Customizing Event Settings for Recurring Events* section, on page 17.



Note: The Event settings initially displayed when *scheduling* the Event and clicking the **Customize Event Settings** button are the default settings of the specified ICC, as defined by that ICC's System Manager.

When *updating* the Event, the settings displayed when clicking **Customize Event Settings** are those previously defined when you scheduled the Event.

Customizing Event Audio Settings

You can define the Event audio to use either Interwise Audio Conferencing or another conferencing call service. When selecting to use Interwise Audio Conferencing you can also select the audio devices that Event attendees can use during the Event (if configured accordingly by the ICC System Manager).

➤ **To define the Event to use Interwise Audio Conferencing:**

- 1 In the displayed Outlook form (when scheduling and/or updating an Interwise Event), click **Customize Event Settings**. The following window is displayed:

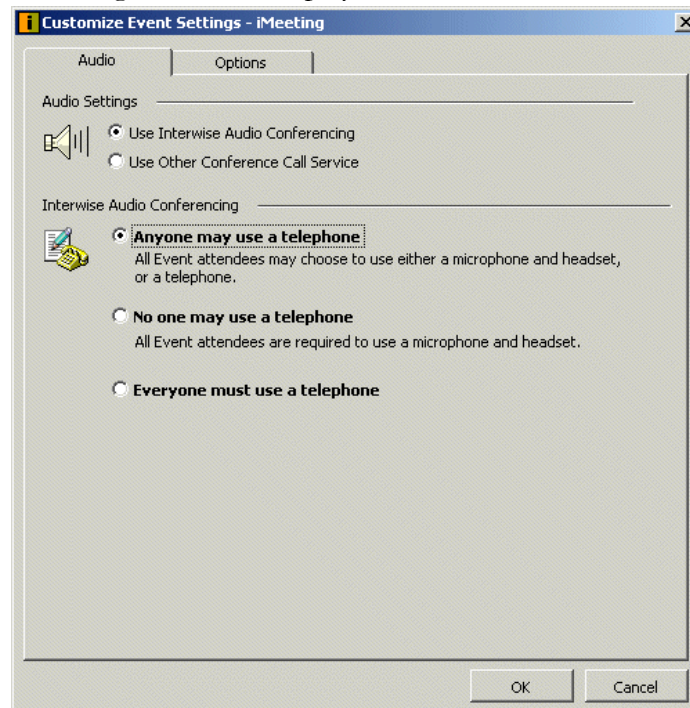


Figure 5: Customize Event Settings – Audio Tab



Note: The window displayed above is for example purposes only. The actual window displayed will depend on the ICC default settings.

- 2 In the *Audio Settings* section of the displayed **Audio** tab, select **Interwise Audio Conferencing**.

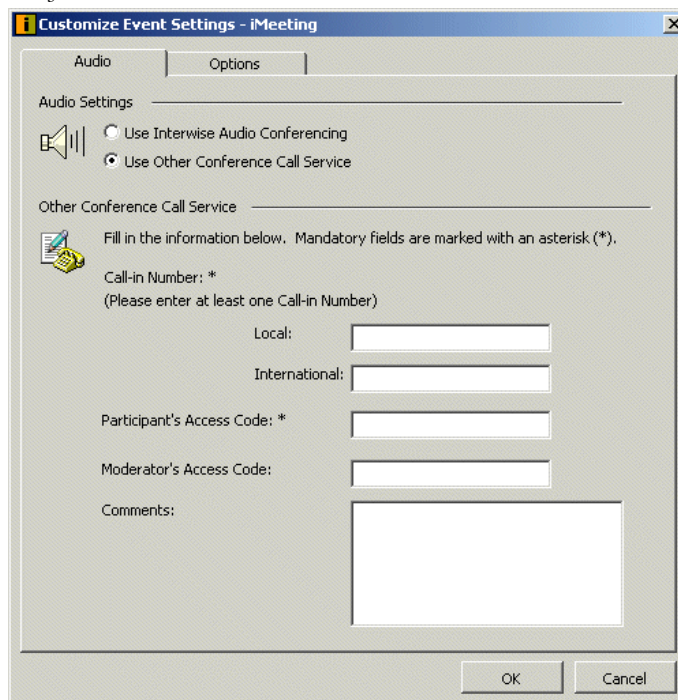
- 3 In the *Interwise Audio Conferencing* section, select the relevant audio option. Using Figure 5 as an example, you can select **No one may use a telephone** if you want all users to connect to the Event with their computers (with either a headset OR microphone and speakers). Alternatively, select **Anyone may use a telephone** if you want attendees to choose their own preferred device (either a telephone OR headset/microphone and speakers).

Note that if the ICC System Manager has defined the ICC to support only telephones or only headsets/microphones and speakers, the options available will reflect this.

- 4 Click **OK**.

➤ **To define the Event to use another conferencing call service:**

- 1 In the *Audio Settings* section of the displayed **Audio** tab, as shown on page 12, select **Use Other Conference Call Service**. The section immediately below it is automatically replaced with the *Other Conference Call Service* section, as shown below.



The screenshot shows a dialog box titled "Customize Event Settings - iMeeting" with two tabs: "Audio" and "Options". The "Audio" tab is active. Under "Audio Settings", there are two radio buttons: "Use Interwise Audio Conferencing" (unselected) and "Use Other Conference Call Service" (selected). Below this, the "Other Conference Call Service" section is displayed. It includes a small icon of a telephone and a note: "Fill in the information below. Mandatory fields are marked with an asterisk (*).". The fields are: "Call-in Number: *" (with a sub-note "(Please enter at least one Call-in Number)"), "Local:" (text input), "International:" (text input), "Participant's Access Code: *" (text input), and "Moderator's Access Code:" (text input). At the bottom, there is a "Comments:" label and a large text area. "OK" and "Cancel" buttons are at the bottom right.

Figure 6: Customize Event Settings – Other Conference Call Service

- 2 Define the following fields:
 - **Call-in Numbers:** Define a **Local** number that local Participants should call in order to join the conference call and an **International** number that internationally located Participants should call.
 - **Participant's Access Code:** The code required by each Participant to actually enter the conference call.
 - **Moderator's Access Code:** The code required by the Moderator to actually enter the conference call.
 - **Comments:** Enter any relevant comments. For example, you may want to include a quick overview of conference call procedures. A maximum of 1400 characters is permitted.



Tip: If you need to create a new line, press <Enter>.

- 3 Click **OK**.

Customizing Event Options

In the **Options** tab of the *Customize Event Settings* window you can define the following settings:

- ◆ **Recording and Video settings**, such as if the Event should be recorded on the server and whether video conferencing is enabled, see below.
- ◆ **Event Entry and Security settings**, such as the Participant application type Event attendees should use, see page 16.

➤ **To customize Recording and Video settings:**

- 1 In the *Customize Event Settings* window, click the **Options** tab. The following window is displayed:

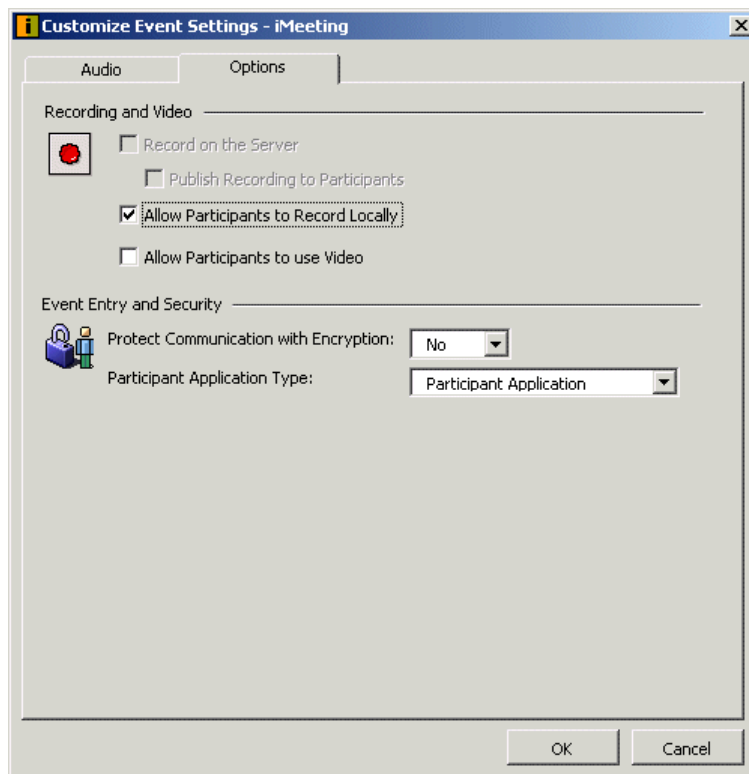


Figure 7: Customize Event Settings – Options Tab

- 2 In the *Recording and Video* section, define the following:
 - **Record on the Server:** Automatically makes a recording of the meeting available for future use.
 - **Publish Recording to Participants:** Enables Participants to view the recording at a later date via the ICC (this option is only enabled if the **Record on the Server** option is selected).
 - **Allow Participants to Record Locally:** Enables Event attendees to record the Event on their computer.
 - **Allow Participants to use Video:** Enables video conferencing to be used during the Event.
- 3 Define other options, as described in the following section, or click **OK**.

➤ **To customize Event Entry and Security settings:**

- 1 In the displayed *Customize Event Settings* window, as shown on page 15, click the **Options** tab.
- 2 In the *Event Entry and Security* section, define the following:
 - **Protect Communication with Encryption:** This option is only displayed if the ICC System Manager has configured Event security settings to be set per Event - if it is not displayed the default ICC setting is implemented. Select either **No** (applies a standard level of security, which is also compatible with previous versions of Interwise applications) or **Yes** (applies a high level of security via SSL (Secure Sockets Layer)).
 - **Participant Application Type:** This option is only displayed if the ICC System Manager has configured Event Entry settings to be set per Event – if it is not displayed the default ICC setting is implemented. Select the default application type for the Event from one of the following:
 - **Participant Application:** Participants can only enter the Event with the Participant application. If a compatible version of the Participant application is not already installed, the latest version is automatically installed on the Participant's computer.
 - **Java Participant:** Participants can only enter the Event with the Java Participant. Note that if the users' browser settings are not Java enabled, users will not be able to access the Event using the Java Participant.
 - **Ask Participant:** Participants will be prompted to select either the Participant application or the Java Participant, regardless of the Event settings defined by the ICC System Manager.
- 3 Define other Event Options, as described in the previous section, or click **OK**.

Customizing Event Settings for Recurring Events

As described in the previous section, you can also customize Audio, Materials and Options settings for Recurring Events.

When initially scheduling the Recurring Event series, the settings you define are applied to all occurrences. However, when updating a Recurring Event's single occurrence or the entire series, a number of additional factors should be taken into consideration, as described below.

This section includes the following:

- ◆ **Customizing Event settings for a single occurrence**, see below
- ◆ **Customizing Event settings for a series**, see below

➤ **To customize or update Event settings for a single occurrence:**

- 1 In the Outlook Calendar, select the occurrence you want to customize. When prompted to select either this occurrence or the series, select **Open this occurrence**.
- 2 In the displayed Outlook form, click **Customize Event Settings**, and then modify the settings as required (refer to the previous section for further information). Note that the settings you define are *specific to this occurrence* and will not be applied to the series.

➤ **To customize or update Event settings for a series:**

- 1 In the Outlook Calendar, select an occurrence of the series you want to customize. When prompted to select either this occurrence or the series, select **Open the series**.
- 2 In the displayed Outlook form, click **Customize Event Settings**, and then modify the settings as required (refer to the previous section for further information). Upon clicking **OK**, the following message is displayed:

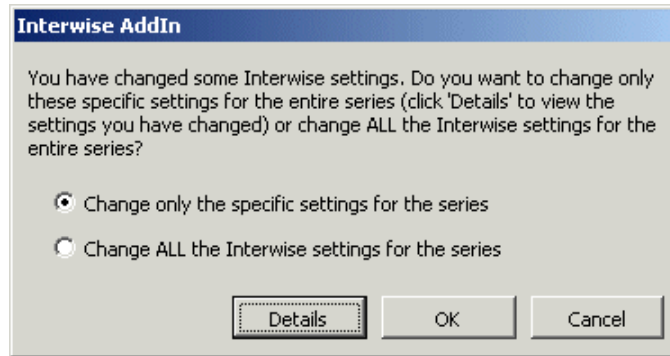


Figure 8: Customize Event Settings – Updating Series

- 3 Select **Change only the specific settings for the series** if you want to apply the specific changes you have made to the series. For example, if you defined the series to allow Participants to use video in each occurrence, only this setting is applied to all occurrences. Any single occurrences with other settings (such as Materials or Audio options) that are different to the series will remain with these different settings.

OR,

Select **Change ALL the Interwise settings for the series** if you want to make the settings you have customized (and those settings you may not have modified) as the settings for the entire series. Note that any occurrences with different settings will be overwritten with these new settings for the series. For example, if an occurrence has Materials that were uploaded to the ICC specifically for that occurrence, these Materials will be removed from the occurrence if the series you defined in Step 2 has no Materials specified.

- 4 Click **OK**.
- 5 Click **Send Update** to update others of the changes you have made.

Working with the Delegate Access / Shared Calendar Features

If you have been granted with permissions to manage someone else's calendar (using Outlook's Delegate Access or Share Calendar feature), you can also create Interwise iMeeting Events just as you would create regular Outlook meetings on behalf of this person.

However, there are several Interwise Outlook AddIn specific settings/prerequisites that need to be taken into consideration:

- ◆ Both you and the person on whose calendar you are working must have the Interwise Outlook AddIn installed.
- ◆ Both you and the person on whose calendar you are working must have valid user accounts on the relevant ICC. Both accounts on the ICC must be set with the primary email address (*SMTP*).
- ◆ When you create a meeting on the other person's calendar, the actual owner of the meeting in the ICC is the other person, similarly to Outlook.

Modifying Outlook AddIn Options

This section describes how to modify Outlook AddIn Options.

Interwise Events you schedule in Outlook are also scheduled in the selected ICC (which is selected when scheduling the Event, as described on page 7). Via the Outlook AddIn Options, you can define the list of ICCs that are available (in the ICC URL dropdown list) when you schedule an Interwise Event. You can add or delete ICCs from this list, as well as make one of the ICCs the default ICC automatically displayed in the Outlook form when scheduling/updating an Interwise Event.

- ◆ **Adding or Deleting ICCs**, see below
- ◆ **Changing the Default ICC**, page 22

Adding or Deleting ICCs

This section describes how to add/remove an ICC to/from the list of available ICCs. These ICCs are included in the ICC URL dropdown list when scheduling an Event (see page 7).

Note that only one of these ICCs can be defined as the default ICC (as described on page 22), though you can change the default ICC at any time.

➤ **To add an ICC:**

- 1 From the Outlook toolbar, click **Interwise Options>Preferences**. The *Preferences* window is displayed.

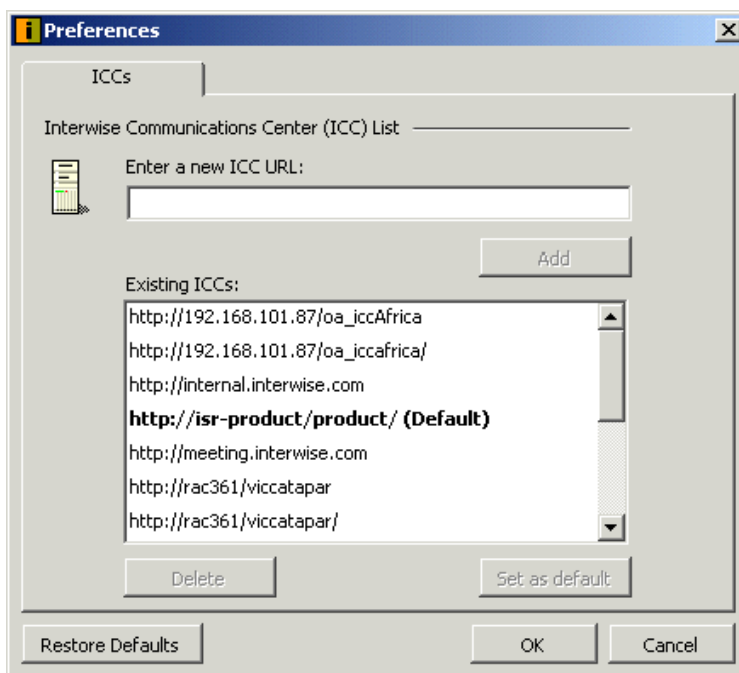


Figure 9: Preferences Window

- 2 Enter an ICC URL in the text box and then click **Add**. The new ICC is automatically added to the list of Existing ICCs.
- 3 Click **OK**.

You can also make the new ICC the default ICC for all future Interwise Outlook Events, as described on page 22. It will automatically be displayed as the selected ICC when scheduling Events, though can be replaced by another ICC in the ICC URL dropdown list, if required.

➤ **To delete an ICC:**

- 1 From the list of Existing ICCs in the *Preferences* window, as shown above, select the relevant ICC.
- 2 Click **Delete**. In the displayed confirmation message, click **Yes**.
- 3 Click **OK**.

Changing the Default ICC

You can change the default ICC at any time. The default ICC is the ICC that is automatically displayed in the Outlook form (in the *ICC URL* field) when scheduling/updating an Interwise Event.

➤ **To change the default ICC:**

In the displayed *Preferences* window, as shown on page 21, select the relevant ICC and then click **Set as default**. The selected ICC is then highlighted in bold and **(Default)** is displayed alongside it.



Tip: Click **Restore Defaults** to revert to the original default ICC.

Receiving Invitations to Events

Once you have installed the Interwise Outlook AddIn, Interwise Event invitations sent by others will be included in your Inbox. According to how your organization has its Outlook Exchange Server configured, you will receive messages with either of the following icons alongside each invitation in your Inbox:



Meeting Request

The regular Outlook meeting icon. In order for the Interwise Event to be added to your Outlook Calendar, you must right-click the message in your Inbox and from the displayed popup menu, select **Accept**.



Email Invitation

This icon indicates the Interwise Event has automatically been added to your Outlook Calendar. These types of invitations are generally sent by users on a different Exchange Server, OR were scheduled in the ICC.

When the Event goes Live, you can directly access the Event from a link in the email invitation or the Calendar, as described in the *Joining Events* section.

Viewing Interwise Events in your Outlook Calendar

In order to view the Events in your Calendar, simply access the Calendar as you normally would and locate the relevant Event. Events are posted into your Calendar as any normal Outlook meeting is posted, as shown below:

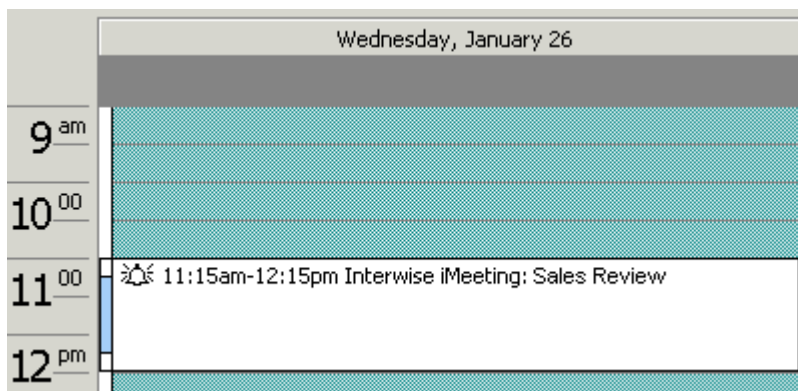


Figure 10: Events in Outlook Calendar

Joining Events

When an Event is scheduled to start, you can double-click the relevant Calendar entry and then click the **Join Event Now** button. You can also access the mail notification you received from the Interwise system and click the relevant link to access the Event. The Participant application is automatically opened upon entering the Event.

➤ **To join an Interwise Event:**

- 1 Display the Outlook Calendar.
- 2 Locate and double-click the Event you want to join.
- 3 In the displayed Outlook window, click **Join Event Now** from the Interwise toolbar. Your browser is then opened automatically and you enter the Event. According to how the Event has been configured, you may be prompted to select an audio device (microphone and speakers/a headset OR your telephone) with which to listen and speak during the Event.

OR,

If you want to join the Event using your telephone only, click **Dial-in Instructions** (this button is only displayed if the Event is configured to allow the use of telephones). This displays the Dial-in Instructions page, which guides you through the dial-in process.



Note: When clicking **Join Event Now**, you may be prompted to enter your first name, last name and email address if the Interwise system does not recognize your email address, OR your user name and password if the Interwise system is configured accordingly.

Alternatively, you can click the link in the email invitation to access the Event. However, this link is not a personal link, and you WILL be prompted to enter your first name, last name and email address.

Updating iMeeting Events

As with any regular Outlook meeting, you can update and delete an iMeeting as required.




Note: Events created in Outlook can only be modified in Outlook – they cannot be modified via the ICC.

➤ **To update an iMeeting Event:**

- 1** Access the relevant Event in your Outlook Calendar and double-click on it to open the Meeting window, as shown on page 8.
- 2** Modify the details as required and re-send the iMeeting notification to the relevant invitees,

OR,

Click  to delete the iMeeting. You can also send notification to the invitees that the iMeeting has been canceled.