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AT Conference Plugin for Microsoft Outlook® User Guide

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1. Introduction

The AT Conference Plugin for Microsoft Outlook® makes it easy to add conference access information to your emails and appointments. It creates customizable command buttons that, when selected, add conference access information to the body of your forms. No more looking up conference phone numbers, passwords, or URLs. No more typo's that delay the start of your meetings.

For added convenience the Plugin is easily updated via an E-Z fill form.

This document provides information on how to customize and use the AT Conference Plugin for Microsoft Outlook®.

2. Entering of Conferencing Data - (Installation / Update)

AT Conference utilizes an E-Z fill form in order to facilitate easy one time entry of the necessary conferencing parameters. These parameters are passed straight through to the Outlook Plugin eliminating the need to utilize the customization tools available within the Outlook Tools Option.


This simple procedure can be used at the time of initial installation as well as an update if codes or dial-in numbers change.

Vista and Windows 7 machines must have Internet Explorer 8 installed or User Account Control must be turned off during the installation.

Info on turning on/off UAC can be found at the following URL:

<http://www.howtogeek.com/howto/windows-vista/disable-user-account-control-uac-the-easy-way-on-windows-vista/>

2.1. First Time Installation

 **Download Plugin for Microsoft Outlook® - New Installation**

Complete the form below and click "Install Plugin" to begin the installation process. Your conferencing account details can be found on your welcome email or wallet card. [Click here](#) if you need to retrieve your audio participant code.

Enter your Information - All Fields are Required

First Name:

Last Name:

Company:

Email:

Phone:
Enter numbers and dashes only: 111-222-3333

Conferencing Account Details

Toll-Free Dial-In Number:
Enter numbers and dashes only: 111-222-3333

International Toll Dial-In Number:
Enter numbers and dashes only: 111-222-3333

Audio Participant Code:
Enter numbers only: 123456789

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2.1.1. Please enter the following information to register the Plugin for Outlook. Registration is used only for notification of product updates.

- First Name
- Last Name
- Company Name
- E-Mail
- Work Phone Number

2.1.2. Using either the welcome e-mail sent at the time of account sign up or the wallet card enter in the following data into the E-Z fill form.

- Toll Free Dial-In Number
- International Toll Dial-In Number
- Audio Participant Code

2.1.3. Click the Install Plugin button for a first time installation. The installation process will begin.

2.2. Update of Conference Information

Plugin for Microsoft Outlook® - Update Existing Installation

Complete the form below and click "Update Plugin" to begin. Your conferencing account details can be found on your welcome email or wallet card. [Click here](#) if you need to retrieve your audio participant code.

Enter your Information - All Fields are Required

Toll-Free Dial-In Number:
Enter numbers and dashes only: 111-222-3333

International Toll Dial-In Number:
Enter numbers and dashes only: 111-222-3333

Audio Participant Code:
Enter numbers only: 123456789012

Update Plugin

[Privacy Policy](#) | AT Conference will not share your information with any third parties for marketing purposes.

2.2.1. Using either the welcome e-mail sent at the time of account sign up or the wallet card enter in the following data into the E-Z fill form.

- Toll Free Dial-In Number
- International Toll Dial-In Number
- Audio Participant Code

2.2.2. Click the Update Plugin button to revise any conference information. The update process will begin.

3. Using the AT Conference Plugin for Outlook® in Emails

The screenshot shows the Outlook interface for an email titled "Sample E-Mail Invitation - Message (HTML)". The "AT Conference" menu is highlighted in the top ribbon, with a red box around it and a white arrow pointing to it. The menu options are: Schedule, Web Conference - One Time Code, Audio Conference, Web Conference, and AT Conference. A white arrow also points to the "AT Conference" option. Below the menu, the email header shows "From: Support at AT Conference", "To: sample@atconference.com", and "Subject: Sample E-Mail Invitation". The main body of the email contains the following text:

=====
CONFERENCE ACCESS INFORMATION
=====

The conference will be held on 7/29/2010 at 1:00 PM Eastern Time
It will last 30 Minutes.
Double Click the attached Invitation file to add this to your calendar.

Audio Conference Details:

Domestic Toll Free: 866-555-5555
International Toll: 857-555-5555
Participant Code: 1234567

Web Conference Details:

Click [HERE](#) to Join the Web Conference.
Participant Code: 1234567

If this is your first meeting with Web Conferencing, we recommend that you perform a system check to ensure a successful conference.
Click [HERE](#) to begin the check

Any questions please contact customer support at 1-877-480-4300

At the bottom, it says "Conferencing services provided by AT Conference" and "Conference Call Services Web Conferencing LEARN MORE about us at www.ATConference.com". A red box highlights the main body text, and a blue callout box with a white arrow points to it, containing the text: "Conference access information as added to the body of the e-mail."

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Outlook 2007 / 2010

In Outlook 2007 and 2010 the Plug In buttons are viewed via the AT Conference tab.



Outlook 2002 / 2003

The Plugin adds the AT Conference Toolbar to the Email window of Outlook.



Clicking on a button adds the appropriate conferencing information to body of the Email.

The Buttons are ordered in a typical usage sequence from left to right but can be also used in any sequence.

1. Schedule - | Schedule
2. Audio Conference - | Audio Conference
3. Web Conference - | Web Conference
4. Web Conference - One Time Code - | Web Conference - One Time Code

Clicking on a button adds the appropriate information to 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 add conference access information.
3. If the Plugin for Outlook® Bar is not visible then select View/Toolbars/AT Conference Plugin for Outlook.
4. Select the appropriate button(s) on the Plugin for Outlook® Bar and the access information is added to the bottom of the email.
5. If you selected a schedule button a Schedule form is presented. See the Schedule Description section below.
6. Send email.

Note: For Outlook 2002 SP3 a security warning will be presented when you send the email. Select 'Yes' to continue and send the e-mail.

3.1. Schedule Description

The Schedule form is shown when a Schedule button is selected. This form collects schedule information in a similar format to the Outlook Appointment form. This information is added to the e-mail in the format provided by the button text field configuration. When the e-mail is sent, an iCalendar file is created. The file will open in an Outlook Meeting Notice form. Recipients can open the file, automatically add the meeting to their calendar and can select Accept, Tentative, or Decline.

The screenshot shows a 'Schedule' dialog box with the following fields and options:

- Location:** Teleconference
- Start time:** 11/30/2006 3:00 PM
- End time:** 11/30/2006 3:30 PM
- Meeting Options:**
 - Reminder:** 1 hour
 - Save as Default Values**
 - Add this meeting to my calendar**
- Buttons:** OK, Cancel, Remove

3.1.1. Location

Specifies the location of the conference.

3.1.2. Start time

Specifies the start date and time. Changing the start date or time will automatically change the end date or time, maintaining the same duration for the conference. The start date and time cannot be earlier than the present time.

3.1.3. End time

Specifies the end date and time. Changing the end date or time does not affect the start date and time, thus altering the duration of the call. The end date and time cannot be earlier than the start date and time.

3.1.4. Reminder

Selecting the Reminder checkbox and entering a reminder time will override the recipients default reminder time. The recipients default reminder will be used if the checkbox is unchecked.

3.1.5. Add this meeting to my calendar

If this checkbox is checked the Addin will save this appointment to the originator's calendar.

3.1.6. Save as Default Values

Check this box to save the Meeting Options values and use them by default when the Schedule form is opened.

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3.1.7. OK

Select OK to add the schedule information to the e-mail.

3.1.8. Cancel

Select Cancel to not add the information to the e-mail or not make changes to information already on the e-mail.

3.1.9. Remove

This is only available if schedule information has previously been added to the e-mail. Select this button to remove the schedule information.

3.2. Audio Conference Description

The Audio Conference button enters into the body of the e-mail or appointment meeting the following information. The entries are based on the information as provided upon initial installation or subsequent update.

3.2.1. Domestic Toll Free

Toll free number to be dialed within the domestic US, Canada, US Virgin Islands and Puerto Rico.

3.2.2. International Toll

Toll number for which International participants can dial in directly or any other participants who do not have access to toll free dialing.

3.2.3. Participant Code

The code which all participants will need to enter to participate in the conference.

3.3. Web Conference Description

The Web Conference button enters into the body of the e-mail or appointment meeting the following information. The entries are based on the information as provided upon initial installation or subsequent update.

3.3.1. Link to join the Web Conference

A direct hyperlink to take the participant to the Start or Join a Web Conference page.

3.3.2. Participant Code

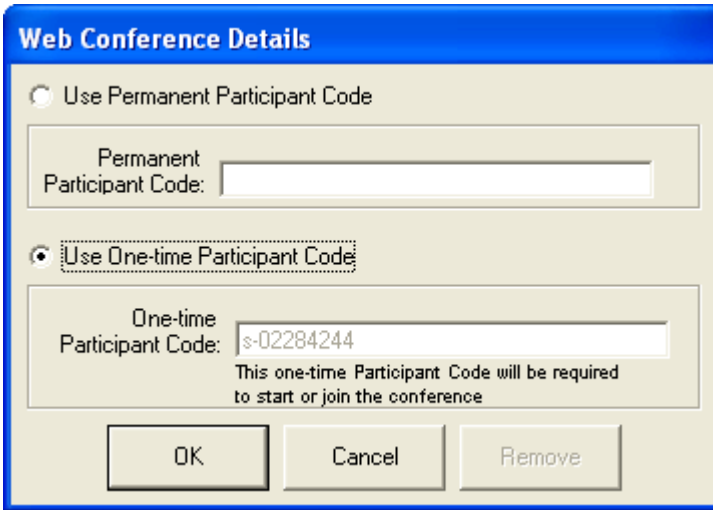
The code which all participants will need to enter to participate in the conference. If the link is used the participant code will auto-populate in the participant code field.

3.3.3. System Check

A direct hyperlink to a system check that participants can use to verify their computers settings prior to attending a web conference.

3.4. Web Conference - One Time Code Description

The Web Conference Details form is shown when the Web Conference – One Time Code button is selected. This form obtains a One-time Participant Code from the providers server if this option is selected. The Participant Code replaces the #ParticipantCode# variable in the button text field.



The image shows a dialog box titled "Web Conference Details". It contains two radio button options. The first option, "Use Permanent Participant Code", is unselected. Below it is a text field labeled "Permanent Participant Code:" which is empty. The second option, "Use One-time Participant Code", is selected. Below it is a text field labeled "One-time Participant Code:" containing the value "s-02284244". Below the text field is a note: "This one-time Participant Code will be required to start or join the conference". At the bottom of the dialog box are three buttons: "OK", "Cancel", and "Remove".

3.4.1. Use Permanent Participant Code

Select this option to use your Permanent Participant Code. The code will be automatically entered into the text field. You can change the value of the Permanent Participant Code for this conference.

3.4.2. Use One-Time Participant Code

Select this option to obtain a One-time Participant Code. The code, obtained from the providers server will be automatically entered into the text field when this option is selected.

4. Using the AT Conference Plugin for Outlook® in Meeting/Appointment Invitations

The screenshot shows the Outlook Appointment form for 'Untitled - Appointment'. The 'AT Conference' menu is open, showing options: Audio Conference, Web Conference, Web Conference - One Time Code, and AT Conference. Red arrows point to the 'AT Conference' menu item and the 'Audio Conference' option. Below the form, the appointment details are shown: Subject: Sample Outlook Calendar Invitation, Location: (empty), Start time: Thu 7/29/2010 8:00 AM, End time: Thu 7/29/2010 8:30 AM, and an 'All day event' checkbox. A red box highlights the conference access information in the body of the invitation, with a red arrow pointing to it from a text box on the right.

=====
===== CONFERENCE ACCESS INFORMATION =====
=====
Audio Conference Details:

Domestic Toll Free: 866-555-5555
International Toll: 857-555-5555
Participant Code: 1234567

Web Conference Details:

Click <http://www.atconference.com/web-conferencing/login.php?schedid=1234567> to Join the Web Conference.
Participant Code: 1234567

If this is your first meeting with Web Conferencing, we recommend that you perform a system check to ensure a successful conference.
Click <http://www.atconference.com/browsercheck.php> to begin the check

Any questions please contact customer support at 1-877-480-4300

Conferencing Services Provided by AT Conference. <http://www.atconference.com>

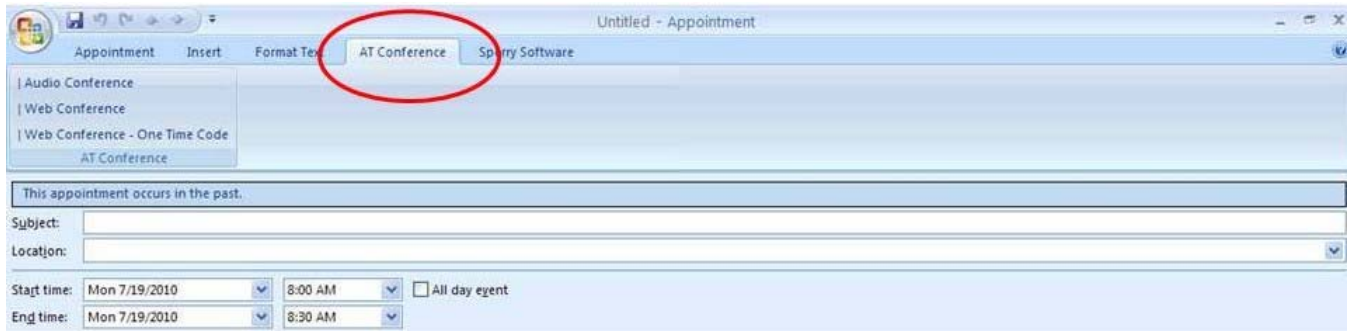
Go to <http://www.atconference.com/outlook> to learn more about conferencing.

Conference access information as added to the body of the calendar invitation.

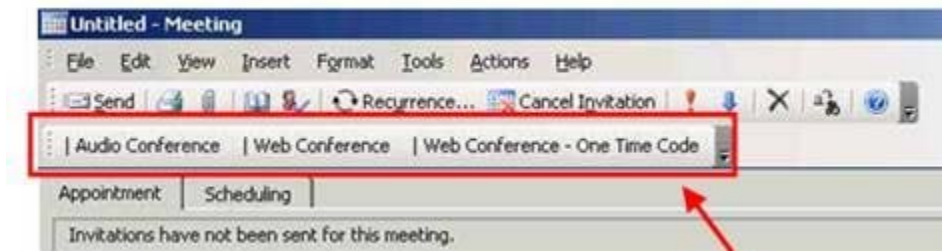
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Outlook 2007 / 2010 - Ribbon Control

In Outlook 2007 and 2010 the Plug In buttons are viewed via the AT Conference tab.



Outlook 2002 / 2003



Clicking on a button adds the appropriate conferencing information to body of the Email.

The Buttons are ordered in a typical usage sequence from left to right but can be also used in any sequence.

1. Audio Conference - | Audio Conference
2. Web Conference - | Web Conference
3. Web Conference – One Time Code - | Web Conference - One Time Code

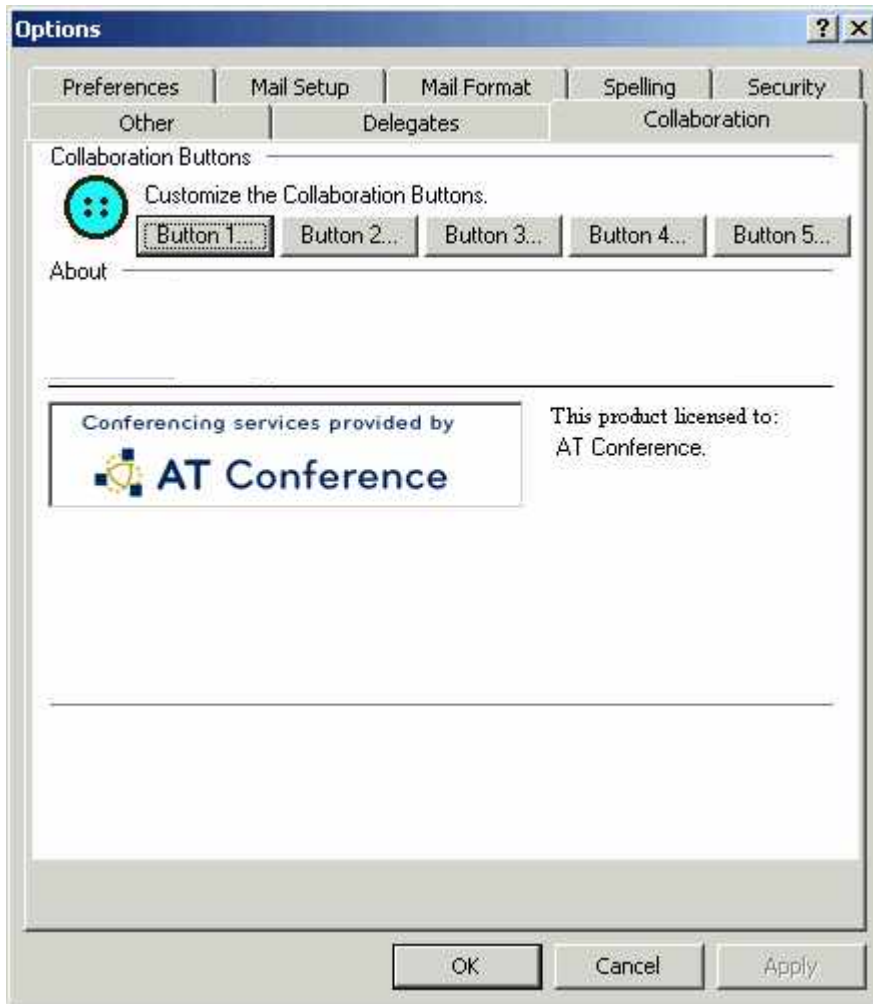
The Plugin adds the AT Conference Toolbar to the Appointment/Meeting window of Outlook. Clicking on a button adds the Text information to the location and body of the Meeting/Appointment.

- 4.1. Open a new meeting/appointment.
- 4.2. Enter the information you would like to include in the notice. You do not need to include conference access information.
- 4.3. Select the appropriate button(s) on the Tool Bar. The access information will be added to the body of the appointment.
- 4.4. Send the Meeting notice.

5. Customizing Your Access Information

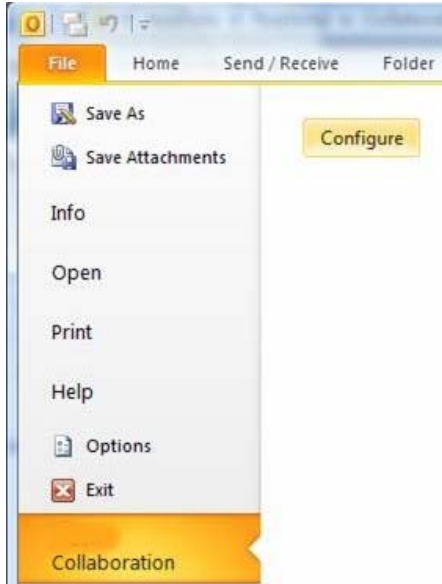
Outlook 2002 / 2003 / 2007

You can customize the AT Conference Plugin Buttons using the Collaboration Tab. Select Tools/Options on the Menu Bar of Outlook. 2002/2003/2007 Select the Collaboration Tab.



Outlook 2010

You can customize the AT Conference Plugin Buttons from the File/Collaboration/Configure button in Outlook.



5.1. Buttons

You can define up to four buttons to display in Outlook. There are two types of buttons. A Text / Hyperlink button can place multiple lines of text and up to two hyperlinks on the Appointment and E-mail forms. A Schedule button will place Meeting Schedule information on an E-mail form.

5.1.1. Text / Hyperlink Button

A Text / Hyperlink Button Type presents the configuration window shown below. This button type is used to add text and up to two hyperlinks to the body of an E-mail or Appointment.

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Customize Collaboration Button 3

Button Appearance

Show this button

Caption | Web Conference

Tooltip | Add Web Conference Details

Text / Hyperlink 1

Position Below the Logo Use Fine Print (Times New Roman 8)

Text | Web Conference Details:
Click **HERE** to Join the Web Conference.
Participant Code: 1126879

Create a Hyperlink using the selected text.

URL Address | http://wip3.webdialogs.com/brands/INF/INF_AmericanTeleconnect/?schedid=1126879
(http://www.mydomainname.com)

NOTE: A Hyperlink is only valid in HTML formatted E-mails. The selected text is replaced with the URL Address in Appointments and non-HTML E-mails.

Text / Hyperlink 2

Position Below the Logo Use Fine Print (Times New Roman 8)

Text | If this is your first meeting with Webconferencing, we recommend that you perform a system check to ensure a successful conference.
Click **HERE** to begin the check.
Any questions please contact customer support at 1-877-480-4300

Create a Hyperlink using the selected text.

URL Address | http://www.atconference.com/browsercheck.php
(http://www.mydomainname.com)

NOTE: A Hyperlink is only valid in HTML formatted E-mails. The selected text is replaced with the URL Address in Appointments and non-HTML E-mails.

OK Cancel

5.1.1.1. Button Appearance

Check the 'Show this button' checkbox if you want this button to be loaded on the Outlook forms.

The Caption and Tooltip have been predefined and cannot be changed.

5.1.1.2. Text / Hyperlink 1

This is the first set of text added to the form if this button is pressed. . The button will add the text below the logo if the Position Below the Logo checkbox is checked. Checking the Use Fine Print box will change the font size to small.

To create a hyperlink within the text, highlight the hyperlink text and check the 'Create a Hyperlink...' checkbox. You must enter a URL for the hyperlink in the format of http:// or https://.

A hyperlink is only valid in HTML formatted E-mails. On Appointment Forms or Plain Text/RTF formatted E-mails, the hyperlink text is replaced with the hyperlink URL. Enter your text so it makes sense in both environments.

5.1.1.3. Text / Hyperlink 2

This is the second set of text added to the form if this button is pressed. Leave the text field empty if you do not need a second set. Typically this field is only used if you need two hyperlinks in your button.

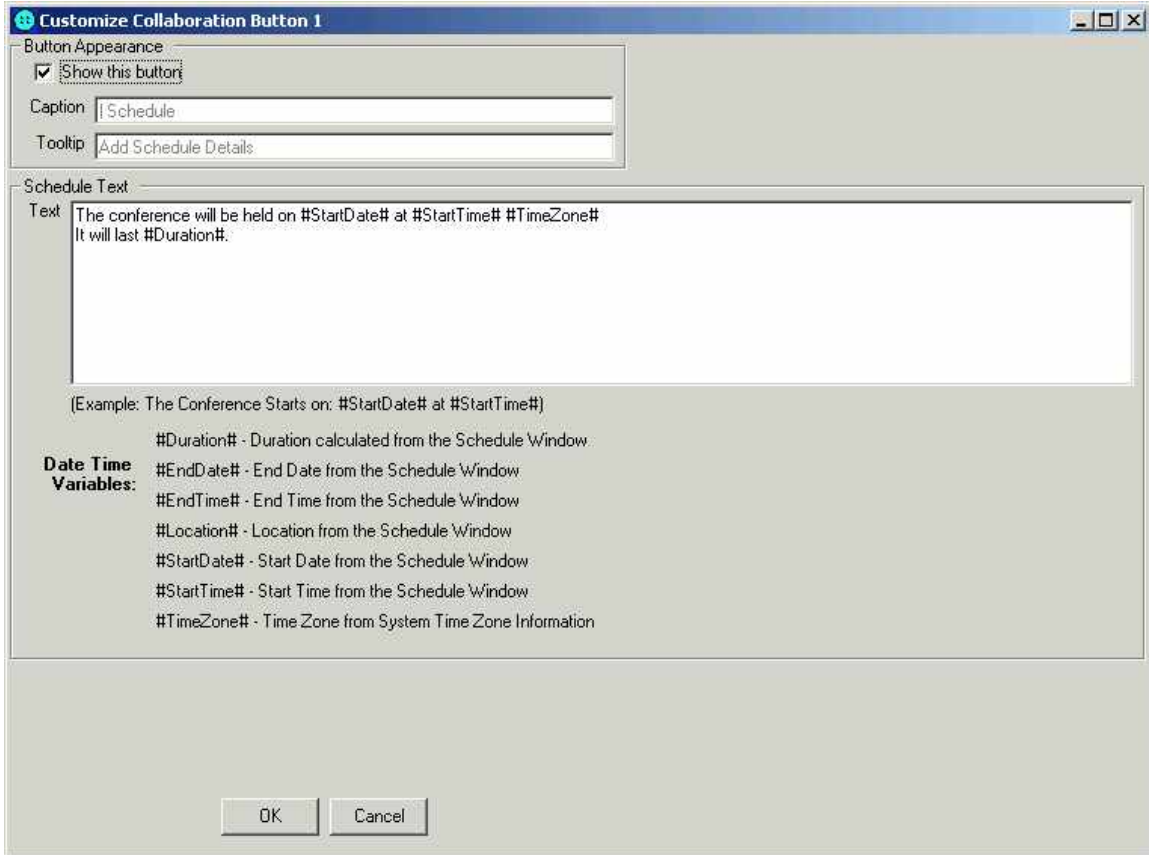
The rules for Text / Hyperlink 1 also apply to this line.

5.1.1.4. OK, Cancel

Select 'OK' to save the changes or 'Cancel' to discard them.

5.1.2. Schedule Button

A Schedule Button Type presents the configuration window shown below. This button type will present the Schedule form and add the schedule information to the body of an E-mail. It will also attach the invitation.ics iCalendar file to the email. This button type will not be loaded on Appointments.



5.1.2.1. Button Appearance

See Text/Hyperlink Button Type

5.1.2.2. Schedule Text

This text is added to the E-mail body after the Schedule form has been completed. The **Date Time Variables** are replaced with values from the schedule form as the text is added to the form.

5.1.2.3. OK, Cancel

Select 'OK' to save the changes or 'Cancel' to discard them.

5.1.3. One-Time Code Button Type

Selecting the One-Time Code Button Type formats the button window as shown below. This button type will present the form used to schedule a One Time Participant Code.

Customize Collaboration Button 4

Button Type
 Text / Hyperlink Schedule WebDialogs One Time Participant Code

Button Appearance
 Show this button
Caption: Web Conference - One Time Code
Tooltip: Add One Time Participant Code - Web Conference Details

Moderator Edit
 Check to give the moderator edit access to the Button Text.
NOTE: This entry applies to all buttons.

WebDialogs
Participant Code: 1126879
Participant Code Variable: The string #ParticipantCode# in the Text and URL fields is replaced with the Participant Code on your forms when the Button is selected.

Text / Hyperlink 1
Text: Web Conference Details:
Click **HERE** to Join the Web Conference.
Participant Code: #ParticipantCode#
 Create a Hyperlink using the selected text.
URL Address: http://wip3.webdialogs.com/brands/INF/INF_AmericanTeleconnect/?schedid=#ParticipantCode#
http://www.myWebDialogspage.com/?schedid=#ParticipantCode#
NOTE: A Hyperlink is only valid in HTML formatted E-mails. The selected text is replaced with the URL Address in Appointments and non-HTML E-mails.

Text / Hyperlink 2
Text: If this is your first meeting with Web Conferencing, we recommend that you perform a system check to ensure a successful conference.
Click **HERE** to begin the check.
If you have any questions or need assistance, contact AT Conference at 877-480-4300.
 Create a Hyperlink using the selected text.
URL Address: http://www.atconference.com/browsercheck.php
http://www.myWebDialogspage.com/?schedid=#ParticipantCode#
NOTE: A Hyperlink is only valid in HTML formatted E-mails. The selected text is replaced with the URL Address in Appointments and non-HTML E-mails.

OK Cancel Advanced...

5.1.3.1. Button Appearance

See *Text/Hyperlink Button Type*

5.1.3.2. WebDialogs

Enter your AT Conference Permanent Participant Code in the Participant Code field.

5.1.3.3. Text / Hyperlink fields

The Text / Hyperlink fields have the same functionality as the fields in the Text/Hyperlink Button. Additionally these fields can use the variable #ParticipantCode# as a placeholder for the One Time Participant Code created when selecting this button. See *Text/Hyperlink Button Type*

5.1.3.4. OK, Cancel

Select 'OK' to save the changes or 'Cancel' to discard them.

6. Remove the AT Conference Plugin for Outlook® Toolbar

There are two methods you can use to remove the Plugin for Outlook® Toolbar. You can temporarily remove the toolbar from use through the Customization form. Or you can permanently remove the toolbar by uninstalling it.

6.1. Temporarily Remove the Toolbar

The toolbar can be removed from the Outlook Email and Appointment forms separately. To remove the toolbar from the Email form open a new email form, select Tools/Customize. On the Customize form, uncheck AT Conference Plugin for Outlook® checkbox. The Plugin for Outlook® Toolbar will disappear. To re-instate the tool bar, return to the Customize form and check the Plugin for Outlook® checkbox.

To remove the toolbar from the Appointment form open a new appointment form, select Tools/Customize. On the Customize form, uncheck AT Conference Plugin for Outlook® checkbox. The Plugin for Outlook® Toolbar will disappear. To re-instate the tool bar, return to the Customize form and check the Plugin for Outlook® checkbox.

6.2. Permanently Remove the Toolbar

Caution should be taken when permanently removing the AT Conference Plugin for Outlook®. You will have to re-install the addin if you want to use it at a later date. To permanently remove the toolbar use Add/Remove programs from the Control Panel. Select AT Conference Plugin for Outlook® from the list of installed programs. Select Remove and follow the directions on the screen.

7. Installation Notes

7.1. System Requirements

- Supported Operating Systems: Windows 2000, Windows Server 2003, Windows Server 2008, Windows 98, Windows XP, Windows Vista, or Windows 7. The latest Service Pack must be installed.
- Outlook Versions: 2002, 2003, 2007 Or 2010. The latest Service Pack must be installed.
- Internet Explorer 6, 7 or 8
- System dlls, including Dot NET 3.0, will be installed if not present.

7.2. Internet Access

The addin requires access to the internet to register the product with the JCS Web Service. This is done once. Internet access is not required after the product has been registered.

8. Limitations

- 2002 SP3 will present a security warning when sending an e-mail that contains schedule information from the Schedule button. Select 'Yes' to continue and send the email.
- Logos can only be added to HTML formatted E-Mail forms. Email forms using Plain Text or RTF formatting and Appointment forms use the Logo Text Field.

9. Known Issues

9.1. Multiple Command Bars

Under the following conditions two AT Conference Plugin for Outlook® Command Bars will be shown on an email form:

1. Word is being used as the e-mail editor.
2. No Word documents are open.
3. Outlook is opened and the first thing done is to open a new email.
4. The Schedule button is used on the new email and the email remains open (not Sent or Closed).
5. All subsequent new emails will contain two AT Conference Plugin for Outlook® Bars.
6. Closing the initial email returns the Addin to normal operation.

9.2. Installing Using the E-Z-Fill Form

Vista and Windows 7 machines must have Internet Explorer 8 installed or User Account Control must be turned off during the installation.