



PO Box 2939
Southampton, NY 11969

Phone: 877-797-3339

FAX: 631-287-3785

Email: support@lawconferencing.com

Plugin for Microsoft Outlook® User Guide

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Law Conferencing

1. Introduction

The Law Conferencing 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 Law Conferencing Plugin for Microsoft Outlook®.

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

Law Conferencing 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.

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2.1. First Time Installation

2.1.1. Go to <http://www.lawconferencing.com/outlook-install-new.php> and 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 your wallet card, fill 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

2.2.1. Go to <http://www.lawconferencing.com/outlook-install-update.php> and 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.

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3. Using the Law Conferencing Plugin for Outlook® in Emails

The Plugin adds the Law Conferencing 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 - 
2. Audio Conference - 
3. Web Conference - 
4. 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/Law Conferencing Plugin for Outlook.
4. Select the appropriate button(s) on the PlugIn for Outlook® Bar and the conference 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 2000 SP3 and 2002 SP3 a security warning will be presented when you send the email. Select 'Yes' to continue and send the e-mail.

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Sample E-Mail Invitation - Message (HTML)

File Edit View Insert Format Tools Actions Help

Send Accounts Attach as Adobe PDF

Arial 10

Schedule | Audio Conference | Web Conference | Web Conference - One Time Code

From... support@lawconferencing.com

To... sample@lawconferencing.com

Subject: Sample E-Mail Invitation

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

The conference will be held on 2/3/2009 at 9:30 AM 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: 111-222-3333
International Toll: 444-555-6666
Participant Code: 98989898

Web Conference Details:

Click [HERE](#) to Join the Web Conference.
Participant Code: 98989898

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 1-877-797-3339

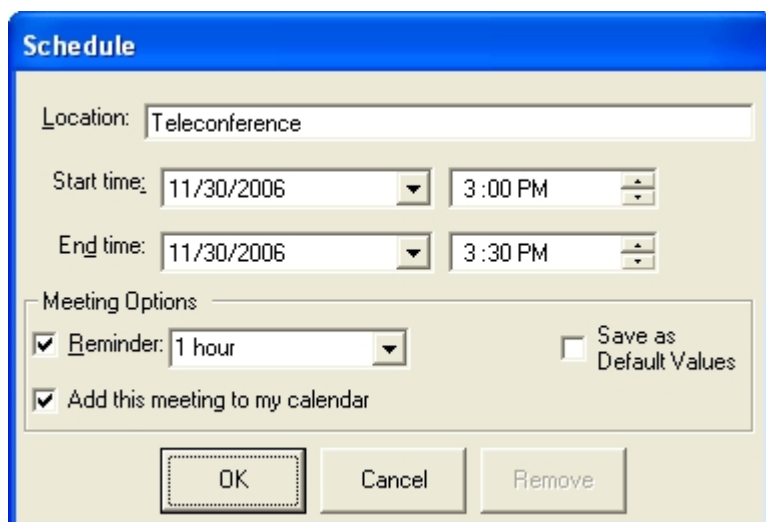
Tool Bar with 4 buttons

Conference access information as added to the body of the e-mail

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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.



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.

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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.

Web Conference Details

Use Permanent Participant Code

Permanent Participant Code:

Use One-time Participant Code

One-time Participant Code:

This one-time Participant Code will be required to start or join the conference

OK Cancel 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

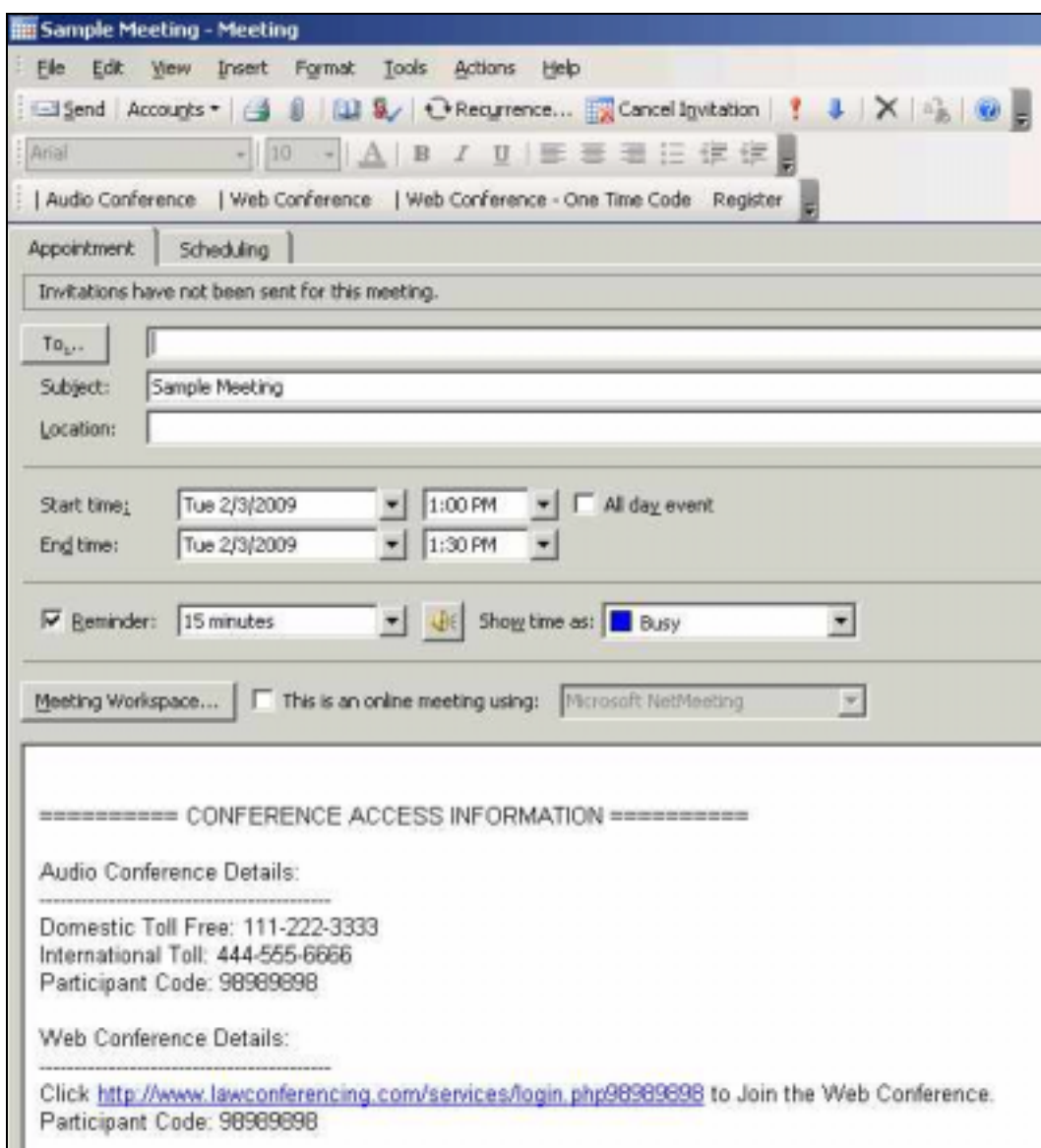
Select this option to obtain a One-time Participant Code. The code, obtained from the providers server will be automatically entered into the text field when this option is selected.

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4. Using the Law Conferencing Plugin for Outlook® in Meeting/Appointment Invitations

The Plugin adds the Law Conferencing 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.

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



The screenshot shows the Outlook Appointment window for a meeting titled "Sample Meeting". The window includes a menu bar (File, Edit, View, Insert, Format, Tools, Actions, Help) and a toolbar with buttons for Send, Accounts, Recurrence, and Cancel Invitation. The appointment details are as follows:

- Invitations have not been sent for this meeting.
- To: (empty)
- Subject: Sample Meeting
- Location: (empty)
- Start time: Tue 2/3/2009, 1:00 PM
- End time: Tue 2/3/2009, 1:30 PM
- Reminder: 15 minutes
- Show time as: Busy
- This is an online meeting using: Microsoft NetMeeting

The body of the appointment contains the following text:

```
===== CONFERENCE ACCESS INFORMATION =====  
  
Audio Conference Details:  
-----  
Domestic Toll Free: 111-222-3333  
International Toll: 444-555-6666  
Participant Code: 98989898  
  
Web Conference Details:  
-----  
Click http://www.lawconferencing.com/services/login.php98989898 to Join the Web Conference.  
Participant Code: 98989898
```

5. Customizing Your Access Information

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



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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.

Customize Collaboration Button 3

Button Appearance

Show this button

Caption: Web Conference

Tooltip: Add Web Conference Details

Location Text for Appointment Form

Text: (meeting room, teleconference numbers, web URL, passcode)

Text / Hyperlink 1

Position Below the Logo Use Fine Print (Spt)

Text: Web Conference Details:
Click **HERE** to Join the Web Conference.
Participant Code: 1234567

Create a Hyperlink using the selected text.

URL Address: http://www.lawconferencing.com/services/login.php/?schedid=1234567
(http://www.mydomainname.com)

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

Text / Hyperlink 2

Position Below the Logo Use Fine Print (Spt)

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.

Create a Hyperlink using the selected text.

URL Address: https://www.conferenceservers.com/browser?brand=lawconferencing
(http://www.mydomainname.com)

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

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.

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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.

Customize Collaboration Button 1

Button Appearance

Show this button

Caption: Schedule

Tooltip: Add Schedule Details

Location Text for Invitation File

Text: (meeting room, teleconference numbers, web URL, passcode)

Schedule Text

Text: The conference will be held on #StartDate# at #StartTime# #TimeZone#. It will last #Duration#. Double Click the attached invitation file to add this to your calendar.

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

#Duration# - Duration calculated from the Schedule Window

Date Time Variables:

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

OK Cancel

5.1.2.1. Button Appearance

See Text/Hyperlink Button Type

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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 Appearance

Show this button

Caption: Web Conference - One Time Code

Tooltip: Add One Time Participant Code - Web Conference Details

WebDialogs

Participant Code: 1234567

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.

Location Text for Appointment Form

Text: (meeting room, teleconference numbers, web URL, passcode)

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://www.lawconferencing.com/services/login.php/?schedid=#ParticipantCode#
(http://www.ny/webDialogPage.com/?schedid=#ParticipantCode#)

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

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.

Create a Hyperlink using the selected text.

URL Address: http://www.conference servers.com/browser?brand=lawconferencing
(http://www.ny/webDialogPage.com/?schedid=#ParticipantCode#)

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

OK Cancel

5.1.3.1. Button Appearance

See Text/Hyperlink Button Type

5.1.3.2. WebInterpoint

Enter your WebInterpoint 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

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#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 Law Conferencing Plugin for Outlook® Toolbar

There are two methods you can use to remove the Law Conferencing 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 Law Conferencing checkbox. The Law Conferencing Toolbar will disappear. To re-instate the tool bar, return to the Customize form and check the Law Conferencing checkbox.

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

6.2. *Permanently Remove the Toolbar*

Caution should be taken when permanently removing the Law Conferencing 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 Law Conferencing Plugin for Outlook® from the list of installed programs. Select Remove and follow the directions on the screen.

7. Limitations

- Outlook 2000 SP3 and 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.
- Outlook 2000 with Word as the editor does not provide the ability to create command bars on the email form. If you want to use the Collaboration Addin in your Outlook 2000 emails, you must configure the email settings to not use Word as the editor (Outlook / Tools / Mail Format / uncheck "Use Microsoft Word to edit e-mail messages")
- 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.
- Outlook 2000 does not support iCalendar files.
 - The Addin will create a vCalendar file in Outlook 2000.
 - If you are using Outlook 2000 and receive an iCalendar file from an Outlook 2002 or 2003 user, you may not be able to utilize the file to add the meeting to your calendar.
- Outlook 2000 does not properly support reminders.
 - The Reminder fields are disabled on the Schedule form in Outlook 2000.

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8. Known Issues

8.1. Multiple Command Bars

Under the following conditions two Law Conferencing 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 Law Conferencing Plugin for Outlook® Bars.
6. Closing the initial email returns the Addin to normal operation.