

# InterCall Centres Integration with Lotus Notes User's Guide



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InterCall, a subsidiary of West Corporation, in partnership with WebEx Communications, Inc provides InterCall Centres web conferencing services. Because InterCall Centres are powered by WebEx™, this guide makes several references to the company name, platform and features.

## Lotus Notes Integration

Lotus Notes integration provides a convenient way for you to schedule, start, or join online meetings using Lotus Notes. Using Integration to Lotus Notes, you can perform these activities without the need to use your web conferencing service website – that is the site on which you normally schedule and join your online meetings.

Integration to Lotus Notes is an add-in program for Lotus Notes, which you download from your web conferencing service website, and then install on your computer. Once you install Integration to Lotus Notes, new options in appear in Lotus Notes, allowing you to quickly schedule an online meeting.

When scheduling a meeting, you can invite attendees using any of your Lotus Notes address books. Attendees whom you invite to a meeting need not use the Integration to Lotus Notes to join the meeting.

Integration to Lotus Notes also provides quick access to the following on your web conferencing service website:

- + My WebEx, which includes your personal list of meetings, user profile and other account options.
- + Any meeting templates that you created to store your preferred meeting settings.

To provide security for your meetings, Integration to Lotus Notes uses 128-bit SSL (Secure Sockets Layer) encryption for all data it sends to and retrieves from your web conferencing service website.

## System Requirements

Before installing WebEx Integration to Lotus Notes, ensure that your computer meets the following system requirements:

- + Windows 2000 or XP
- + Intel x86 (Pentium 400MHZ+) or compatible processor
- + Microsoft Internet Explorer 5, 6, Mozilla 1.6 or later, or Netscape 7.x
- + JavaScript and cookies enabled for the browser
- + 56K or faster Internet connection
- + IBM Lotus Notes version 6.0 or 6.5

## Installing WebEx Integration to Lotus Notes

To install WebEx Integration to Lotus Notes on your computer, you must first download the setup program from your web conferencing service site. Before installing Integration to Lotus Notes, ensure that:

- + Your computer is connected to the Internet
- + You have the following information handy:
  - The web address, or URL, for your web conferencing service site
  - Your user name and password
  - Your Lotus Notes user name and password.

Important:

- + You must be logged in as an administrator on your Windows 2000 or XP computer. If you do not have an administrator account for your computer, have your system administrator login to your computer for you. Once setup is complete, you do not need to log in as an administrator to use Integration to Lotus Notes.
- + You must have either Designer or Manager access to your organisation's Lotus Notes (Domino) server. If you do not have either of these access levels, ask your system administrator to modify your Lotus Notes user account.

### To install Integration to Lotus Notes:

- 1 Close Lotus Notes if it is running on your computer.
- 2 Go to [www.intercallcentres.com](http://www.intercallcentres.com)
- 3 Click on the service that you want to use.
- 4 In the new window, select the Resource Centre and look for the Integration to Lotus Notes plug-in.
- 5 Save the setup program to your computer.
- 6 Do either of the following:
  - a. In the Download Complete dialog box, click Open.
  - b. Double-click the setup program, which has the file name notesint.msi.
- 7 Follow the instructions in the setup program.
- 8 After you complete the setup program, start Lotus Notes. A status message will appear on your screen, indicating that the setup program is completing the installation of Integration to Lotus Notes.

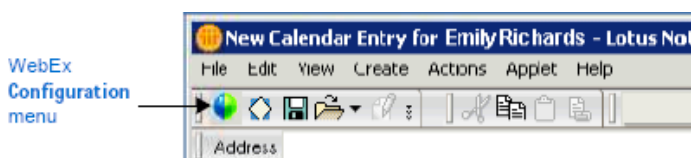
## Overview of Integration to Lotus Notes options

The Integration to Lotus Notes setup program adds the following items to Lotus Notes:

- + WebEx Configurations menu
- + New options on the Calendar Entry/Meeting screen.

### The WebEx Configurations menu

The WebEx Configuration menu appears in the Lotus Notes toolbar as follows:

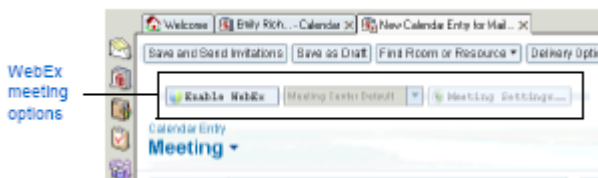


The WebEx Configuration menu includes the following commands:

My WebEx	Access your My WebEx area on your web conferencing service website. For details about My WebEx, refer to the online Help on your site.
Account Settings	Enter your user account information and verify that you can login to your service website.
Meeting Templates	Access the meeting templates that you saved on your WebEx service site. You can choose a new default meeting template, or view details about a template.
Check for Update	Check for updates to WebEx Integration to Lotus Notes. Depending on the configuration of your web conferencing service site, this option may be unavailable.

## WebEx Options on the Calendar Entry/Meeting screen

Options appear on the Calendar Entry/Meeting screen as follows:



Enable/Disable WebEx	Activate or deactivate WebEx online meeting options on the Calendar Entry/Meeting screen.
Meeting Templates	Select the meeting template that you want to use for your online meeting.
Meeting Settings	Set options for your online meeting.

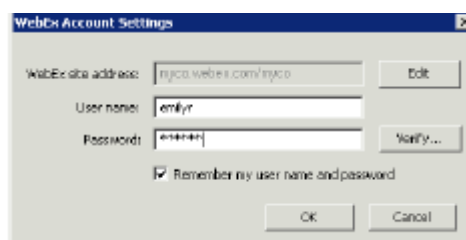
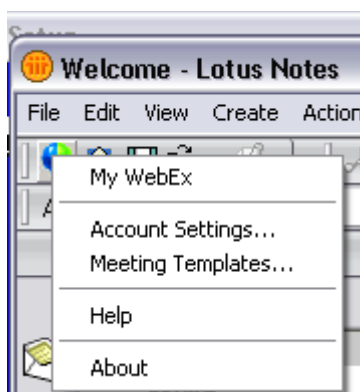
## Specifying your WebEx Account Settings

To schedule an online meeting in Lotus Notes, you must specify the following WebEx account information:

- + URL of your web conferencing service site (example: companyname.webex.com)
- + Account user name
- + Account password.

To specify account information:

- 1 In Lotus Notes, on the toolbar, click the WebEx Configuration button, and then choose Account Settings. The WebEx Account Settings dialog box appears.



- 2 In the WebEx site address text box, enter the URL for your web conferencing service site (example: companyname.webex.com. For MeetingCentre per minute site users, the website URL is intercall.webex.com).
- 3 In the User name text box, enter your user name for your site.
- 4 In the Password text box, enter your password.
- 5 Optional. Click Verify to ensure that your account information is correct.
- 6 Optional. To let Lotus Notes log you in to your site automatically when you schedule a meeting, select the remember my user name and password check box.
- 7 Click OK to save your account settings.

## Scheduling a Meeting

Before scheduling an online meeting using Integration to Lotus Notes, note the following:

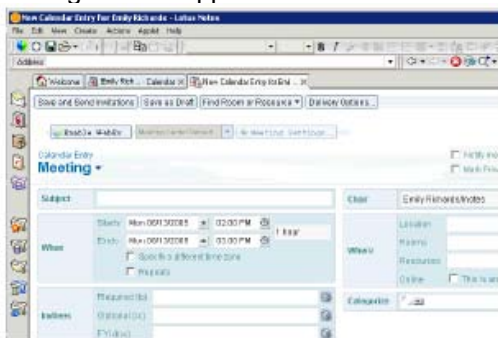
- + Integration to Lotus Notes provides basic options for scheduling a meeting. Thus, some options that appear on your web conferencing service site are not available in Integration to Lotus Notes.
- + Integration to Lotus Notes does not support all of the “repeats” (recurrence) options that are available in Lotus Notes.
- + In any meeting invitations that you send in Lotus Notes, the meeting’s start time appears in the time zone that is set on your computer, not in your site preferences for your site.
- + On your website, all meeting times appear in the time zone that you set in your site preferences, regardless of the time zone that is set on your computer.

## Setting up a scheduled meeting

To schedule an online meeting or meeting using WebEx Integration to Lotus Notes, you open a new meeting entry in Lotus Notes and then specify the information about the meeting as follows.

### Open a new meeting entry in Lotus Notes:

- 1 Ensure that your computer is connected to the Internet.
- 2 In the Lotus Notes, open your Calendar, and then click Schedule Meeting. The Lotus Notes New Calendar Entry/Meeting window appears.



Enter general meeting information:

### Enter general meeting information:

- 1 In the New Calendar Entry/Meeting window, type a topic for the meeting in the Subject box.
- 2 In the Starts and Ends drop-down lists, set the starting and ending times for the meeting, respectively.

Note: You can schedule repeating meetings. However, there are some repeat options that Integration to Lotus Notes does not support.

## Invite attendees to the meeting:

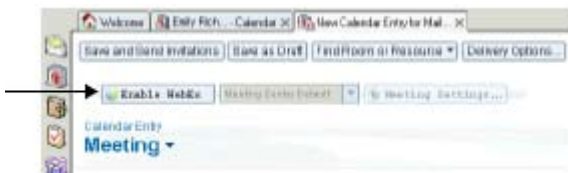
- + In the Invitees section, invite attendees, using the options available in Lotus Notes.

## Set other Lotus Notes options:

- + Optionally, set other options that Lotus Notes provides for meetings, such as delivery options.

## Enable WebEx options:

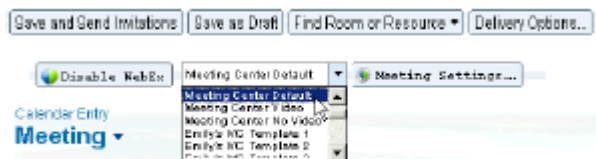
- + At the top of the New Calendar Entry/Meeting screen, click Enable WebEx.



A message appears, indicating that Integration to Lotus Notes is establishing a connection with your web conferencing service website to verify your user account. Wait for a message to close automatically.

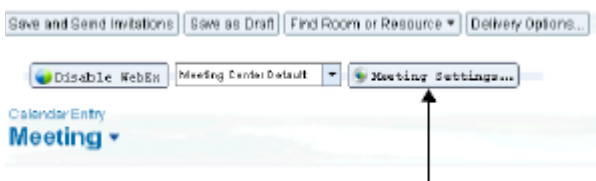
## Select a WebEx meeting template:

- + At the top of the New Calendar Entry/Meeting screen, in the Meeting Templates drop-down list, select the template that you want to use for the meeting.




## Enter information about your online meeting:

- 1 At the top of the New Calendar Entry/Meeting screen, click Meeting Settings.



a. The Meeting Settings dialog box appears.



**Meeting Settings**

Set Meeting Password

Meeting password: \*\*\*\*\* (Required)

Confirm password: \*\*\*\*\*

Exclude password from email invitation

Audio Options

Integrated VoIP: No

WebEx teleconference: Attendees call in

Change Audio Options...

Meeting Type Information

Service type: Meeting Center  Unlisted meeting

Meeting type: Pro meeting

Tracking code: None

Select Tracking Code...

OK Cancel Apply

2 Under Set Meeting Password, do the following:

a. Type a password for the meeting in the Password and Confirm password boxes.

3 Optional. Under Audio Options, click Change Audio Options to select different audio options for the meeting.