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Integrating With Microsoft Outlook and Other Applications

This chapter will teach you how to use two very useful external Connect applications that should help you in the process of creating and attending Connect meetings. These are as follows:

- Adobe Connect Outlook Add-in
- Adobe Connect Add-in for Microsoft Lync

In this chapter we will demonstrate to you different functionalities as well as detailed description of the preceding applications. These applications are very handy when users want to create meeting, attend a meeting, or send invitations to other meeting attendees without the previous need to log in to the Adobe Connect Central application. Note that for the purpose of this chapter we used Microsoft Outlook 2010 and Microsoft Lync 2010 so if you are using older versions of those softwares, things might be slightly different.

Adobe Connect Outlook Add-in

This Add-in is very useful for users who frequently use Microsoft Outlook as their mail client. Outlook Add-in allows users to quickly include Adobe Connect meetings to Outlook calendar and create meeting invitations and appointments. When a user schedules a Connect meeting through Add-in Outlook, an appointment request is created. This request will be included in the calendar of all meeting invitees and a reminder will be created for those users who accept the meeting request. You can download the Adobe Connect Add-in from `http://www.adobe.com/support/connect/downloads-updates.html`.

On this page you should search for the **Microsoft Outlook Add-in** link. When downloading is finished, the user should proceed with installation. The first time Outlook is started after the Add-in installation, a notification dialog box will appear, as shown in the following screenshot:
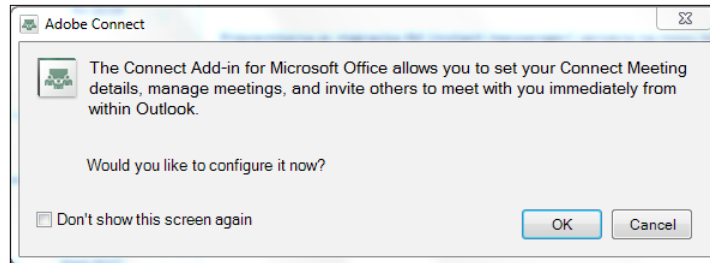
If you don't want to configure settings at this moment and don't want to see the notification dialog box the next time when Outlook starts, you should click on the checkbox next to **Don't show this screen again** and click on the **Cancel** button. On the other side if you want to configure Add-in settings, click on the **OK** button. This action will display the **Edit Adobe Connect Settings** window. In this window you will find options to set the Adobe Connect server as well as to choose or create a meeting room.
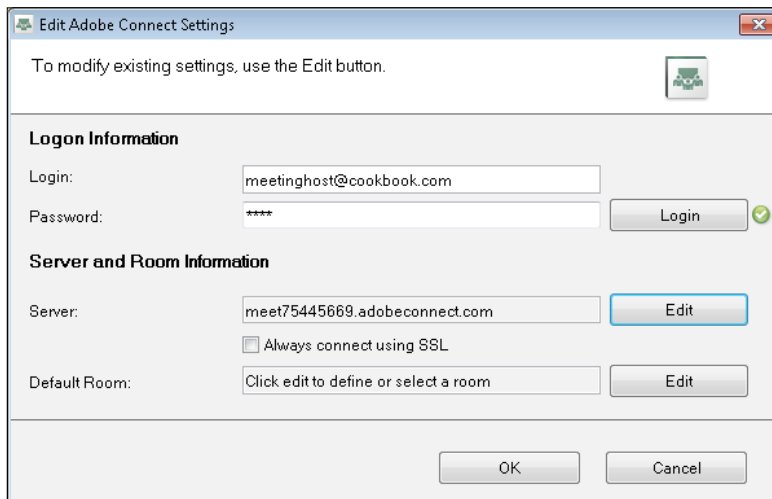
In the **Logon Information** section of this window the user will need to provide login his or her ID and password for a specified Adobe Connect server; but before clicking on the **Login** button, additional settings need to be configured and those are the Connect server and default meeting room. In order to configure server settings the user should click on the **Edit** button on the right-hand side of the **Server** field. This will then take you to the **Change Server** window.
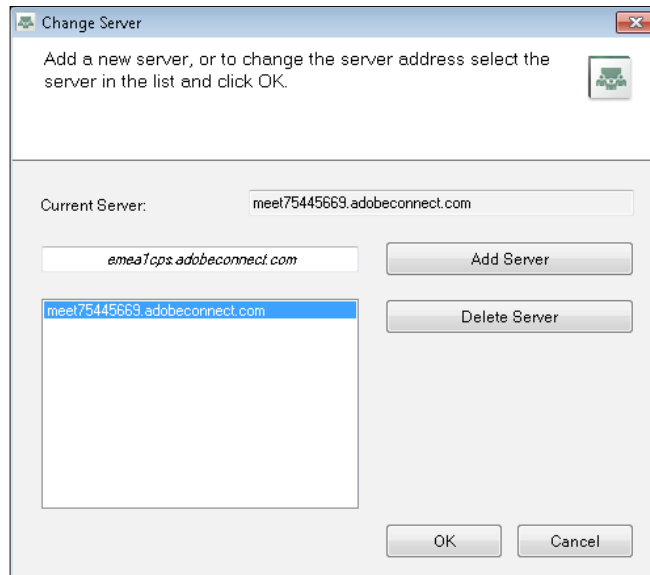
Here you will find functionalities to add a server, delete a server, and mark a specific server as the current server. To add a server and mark it as the current server the user should perform the following steps:

1. Enter the Adobe Connect server URL address in the text field.
2. Click on the **Add Server** button.
3. After this the server is added to server list.
4. Select a specific server from the server list.
5. Click on the **OK** button.

To delete a server perform the following steps:

1. Select a specific server from the server list.
2. Click on the **Delete Server** button.

Once the server is marked as **Current Server**, clicking on the **OK** button will return you to the **Edit Adobe Connect Settings** window and should set the value inside the **Server** field. Since we have now defined the server, the next step would be to configure a default meeting room. For this you should click on the **Edit** button on the right-hand side of the **Default Room** field. The **Edit My Meeting Rooms** window will be shown. Here the user needs to perform the following steps:

1. Change the server.
2. Create a meeting room.
3. Customize meeting room invitations.
4. Select the default meeting room.
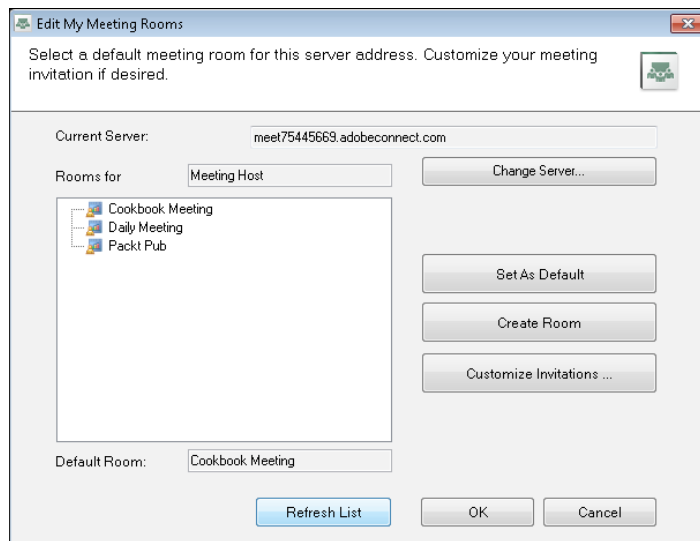
We will go through a basic description of this window before we focus on explaining functionalities. In the **Current Server** field you should see the URL address of the currently selected server. In the **Rooms for** field you can see username of the logged in user. In the meetings list you should find all the meeting rooms associated with the logged-in user and in the **Default Room** field you will see the name of the meeting room, which is set as the default one currently. Now we can proceed with the functionality explanations. If there is a need to change server, perform the following steps:

1. Click on the **Change Server...** button.
2. This click will display the already described **Change Server** window.

To change the default meeting room the user should perform the following steps:

1. Select some meeting room from the meetings list.
2. Click on the **Set As Default** button.
3. After doing this, a new value should be present in the **Default Room** field.

In order to create a new meeting room the user should perform the following steps:

1. Click on the **Create Room** button.
2. The **Create Meeting Room** window will be displayed:
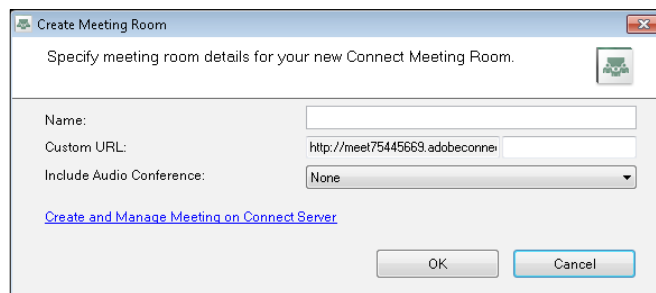
3. In the **Name** text field enter a new meeting room name.
4. In the **Custom URL** field add some custom URL address; this one should begin with a character and should contain only alphanumeric values.
5. Click on the **OK** button.
6. By doing this you've created a new room and this new meeting room should be present in the meetings list.

To change invitation content for a specific meeting room perform the following steps:

1. Select the desired meeting room.
2. Click on the **Customize Invitations...** button.
3. When this is done, the **Customize Invitations** window will be shown.
4. In the **Meeting Invitation** text area you can edit invitation content. In case you want to permanently preserve changes you made, click on the **OK** button, otherwise you can revert changes you made by clicking on the **Reset Invitation Text** button.

As you will see in the following screenshot, in addition to the two buttons mentioned previously, the **Customize Invitations** window also contains a drop-down list where you can switch among different meeting rooms and the **Create Room** button. By clicking on this the user will open the **Create Meeting Room** window. The **Customize Invitations** window also contains the **Edit Audio Conference** button; by clicking on this the **Edit Audio Conference Settings for Meeting** dialog box will be shown. In this dialog box you will find the following text fields:

- **Conference Number**
- **Participant Code**

Fill in the necessary data in order to include this information in your meeting invitations.
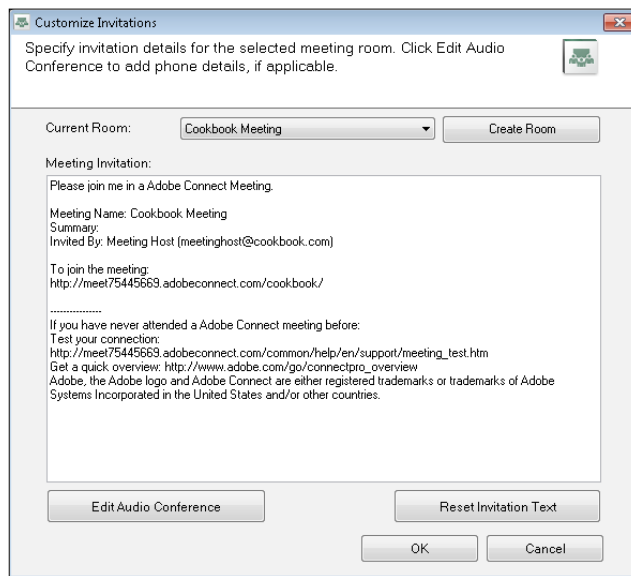
We have now gone through configuration settings of the Adobe Connect Outlook Add-in. Once settings are configured they can be changed any time you need and as many times you need. To edit settings you will need to use the Adobe Connect toolbar, which is available under Outlook's **Add-Ins** main menu.

Since we have configured the add-in, we will now teach you how to use Connect Add-in from Outlook. In the next sections we will cover three scenarios.

Example 1 – creating a meeting

The following is the first way to create an appointment for the default meeting room:
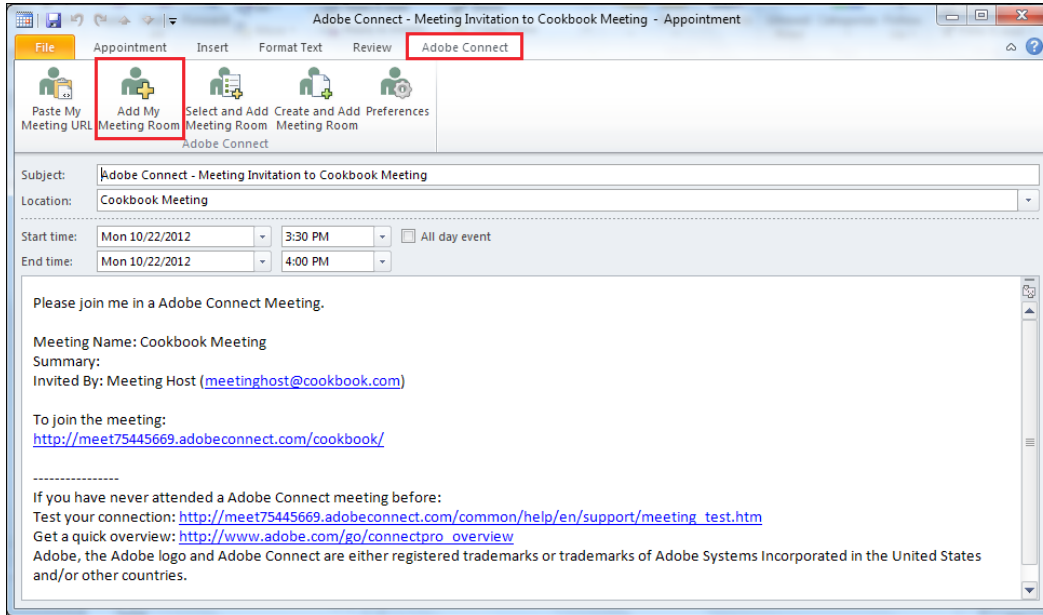
1. Click on Outlook's **Add-Ins** main menu item.
2. Click on the **Add** option, which is displayed as 👥.
3. This will pop up meeting invitation window.
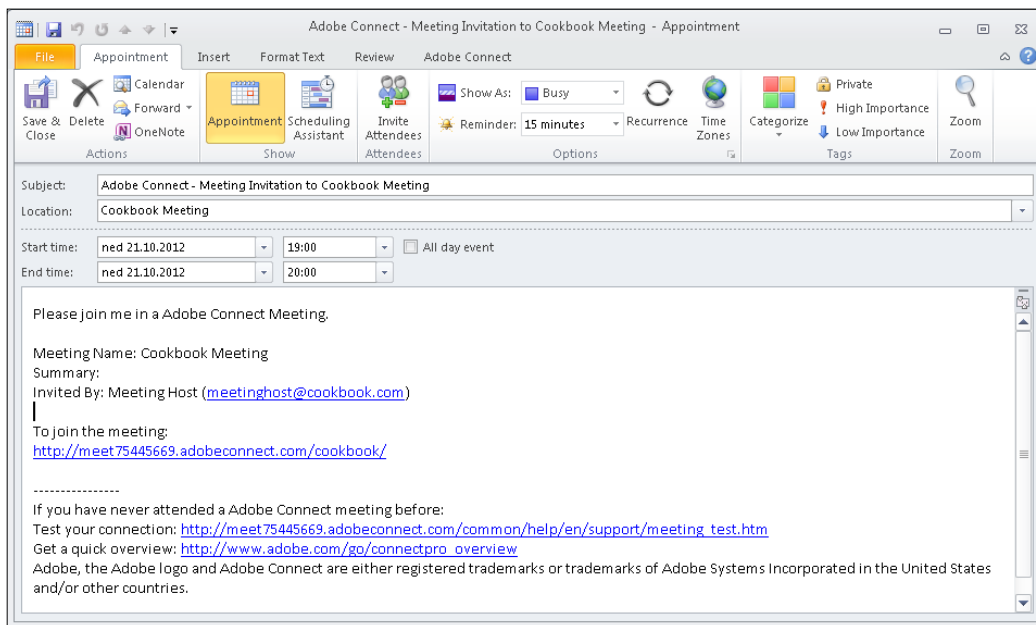
The second way to trigger the same event would be as follows:

1. Click on Outlook's **New Items** toolbar option.
2. Click on the **Appointment** meeting menu option.
3. This will pop up an untitled appointment window.
4. Click on the **Adobe Connect** menu item.

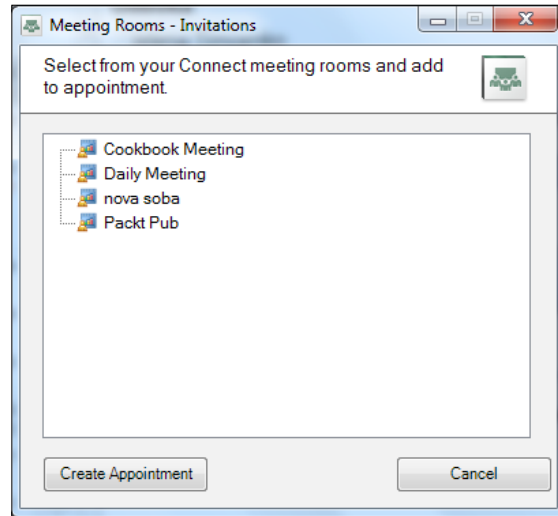5. Click on the **Add My Meeting Room** toolbar option.

Example 2 – creating an appointment

The first way, which is the default one, to create a meeting appointment for different meeting room would be as follows:

1. Click on the Outlook's **Add-Ins** main menu item.
2. Click on the **Select** option, which is displayed as ⬛.

3. This will display the **Meeting Rooms – Invitations** window, as shown in the following screenshot:

4. Select the desired meeting room from the list.
5. Click on the **Create Appointment** button.

The second way to execute the same action is as follows:

1. Click on Outlook's **New Items** toolbar option.
2. Click on the **Appointment** meeting menu option.
3. This will pop up an untitled appointment window.
4. Click on the **Adobe Connect** menu item.
5. Click on the **Select** or **Add Meeting Room** toolbar option.
6. This will now display the **Meeting Rooms – Invitations** window.

Example 3 – creating a meeting and meeting room invitation

This example will demonstrate how to create a new meeting room and create a meeting invitation for a newly created room. To do this you should perform the following steps:

1. Click on Outlook's **Add-Ins** main menu item.
2. Click on the Create option, which is displayed as ![icon].

3. This will display the **Create Meeting Room** window.

4. Fill in all the necessary data.

5. Click on the **OK** button.

6. This will pop up a new window, which contains invitations for this newly created meeting.

Another way to execute the same action would be as follows:

1. Click on Outlook's **New Items** toolbar option.

2. Click on the **Appointment** meeting menu option.

3. This will pop up an untitled appointment window.

4. Click on the **Adobe Connect** menu item.

5. Click on the **Select** or **Add Meeting Room** toolbar option.

6. This will display the **Create Meeting Room** window.

We have now passed through some basic scenarios on how to create Adobe Connect meeting invitations and appointments from Microsoft Outlook, and by doing this we have finished the explanations of Outlook Add-in. We will now switch to Microsoft Lync Add-in.

Adobe Connect Add-in for Microsoft Lync

This Add-in is suitable for those users who use Microsoft Lync (formerly Microsoft Office Communicator) as their instant messaging client. Add-in allows users to quickly send Adobe Connect meeting invitations to their Microsoft Lync contacts. Add-in can be downloaded from `http://www.adobe.com/support/connect/downloads-updates.html`.

Search for the **Lync and Office Communicator Add-in** link. Once the user has downloaded and installed the add-in and after Lync is started, the Add-in toolbar should be visible at the very bottom of the **Microsoft Lync** main window, as shown in the following screenshot:
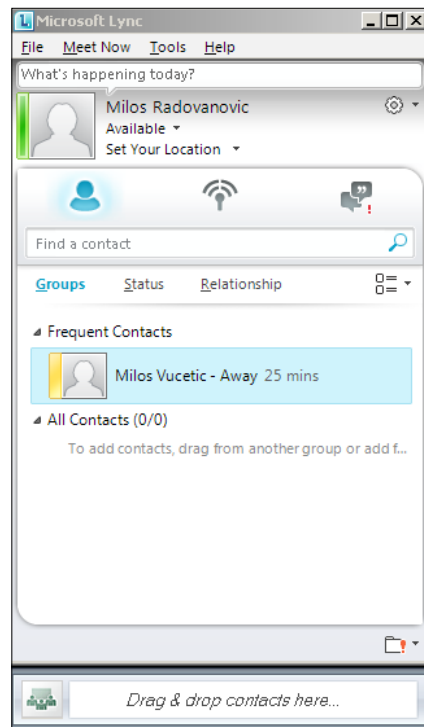
Before the user can start using Connect Add-in for Lync, some additional settings need to be defined. The user should define the URL address of the Adobe Connect server and should also define which meeting room should be used. These settings can be configured in the **Options** window of Add-in. To open this window the user should perform the following steps:

1. Click on the **Tools** menu item in the **Microsoft Lync** window.

2. Click on the **Adobe Connect Add-in Options** menu item.
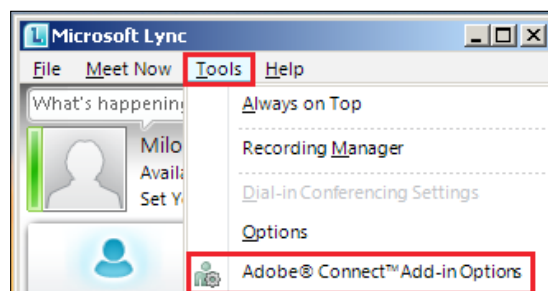
3. Once this is done, the **Adobe Connect Options** window will be displayed. Here you will find text fields to enter credentials as well as a text field to enter the Adobe Connect server's URL address.
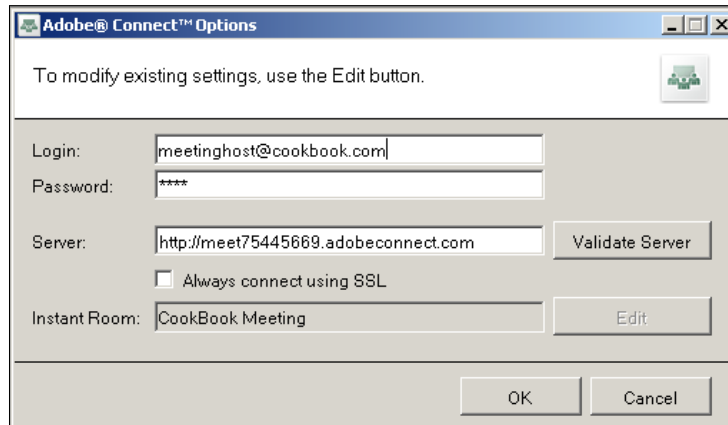
4. Enter your login ID, password, and Adobe Connect server's URL. Note that the server's URL address should start either with `http://` or `https://`. Once this data is entered, the user can validate the server connection by clicking on the **Validate Server** button. If the entered data is correct, the user should be able to see a green checkmark next to the **Validate Server** button, as shown in the following screenshot:
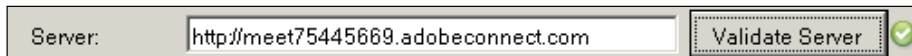
If the data isn't correct, a red cross mark will appear, as shown in the following screenshot:
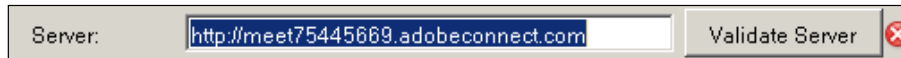
5. If the server was validated successfully, the **Edit** button on the right-hand side of the **Instant Room** field will be enabled. This means that we have configured the Adobe Connect server and now we can proceed with the meeting room configuration. In order to do so, click on the **Edit** button. This will display the **Meeting Rooms** window, as shown in the following screenshot:

Here the user can select an instant meeting room, which will be used later on when meeting invitations are sent. The meetings list is populated based upon the user credentials, which were passed previously, and only the meetings for that user will be present in the meetings list. To select a specific meeting room and use it as the default one, perform the following steps:

1. Select the desired meeting room from the meetings list (in the preceding screenshot, the only meeting room available for this user is **Cookbook Meeting**).

2. Click on the **Set as Instant Meeting Room** button.

3. Click on the **OK** button. By doing this you have configured Add-in for using it with Microsoft Lync.

4. To send meeting invitations to one contact or several contacts from the list, the user should simply select contact(s) and drag-and-drop them in the Add-in toolbar. When this is done, an instant message with invitation content and the meeting room's URL address will be displayed.
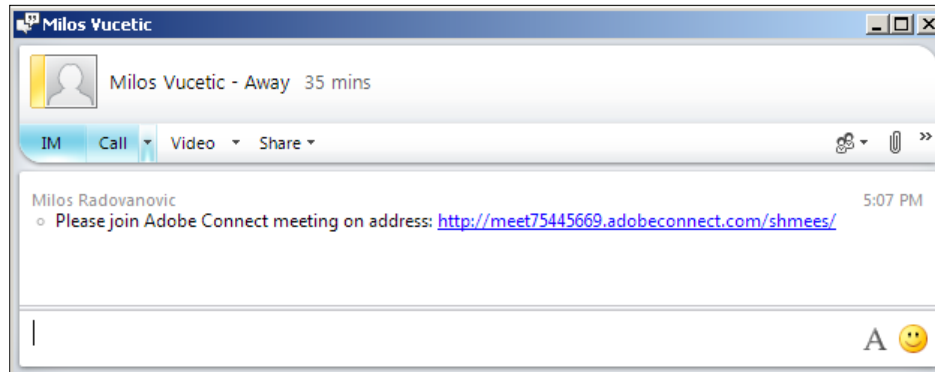
5. To join the meeting room, the selected contact(s) will just need to click on the URL address provided. By sending the meeting invitation, we have finished our explanations of the usage of Adobe Connect Add-in for Microsoft Lync.

Summary

In this chapter you have learned how to use Adobe Connect Outlook Add-in. By using this Add-in the process of meeting management as well as invitation of attendees is simplified for those users who use Microsoft Outlook as their default mail client. Also in this chapter we covered functionalities of Connect Add-in for Microsoft Lync. This one should help users who use Lync as their instant messenger and should simplify the process of sending invitations to user contact(s).