



## APPENDIX **A**

# Resource Manager Microsoft Outlook Add-on

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The Resource Manager Microsoft Outlook Add-on is a separately installed plug-in that allows users to schedule a meeting via the Microsoft Outlook appointment-form interface rather than in the Resource Manager web interface. This section details the Resource Manager Microsoft Outlook Add-on installation and configuration. Topics in this section include:

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## System Requirements

The following are the system requirements for the use of Resource Manager Microsoft Outlook Add-on:

- One of the following supported Microsoft Outlook versions
  - Microsoft Outlook 2000 (with Service Pack 3)—The service pack updates Microsoft Outlook and enables Resource Manager Microsoft Outlook Add-on to modify recurring meetings.
  - Microsoft 2002 (Outlook XP)
  - Microsoft Outlook 2003



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**Note** For support for Microsoft Outlook 2000 running on Windows 2003, refer to Microsoft Knowledge Base number 217640.

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- Microsoft Exchange 2000 Server or 2003 Server
- Dedicated e-mail account for receiving meeting messages including meeting accept and decline messages.
- A server running an installed version of Resource Manager to which the add-on connects.

# Installation

This section includes information about installation on the server-side and the client-side.

## Server-side Installation

A system administrator is permitted to install the Resource Manager Microsoft Outlook Add-on on the controller server domain.

## Client-side Installation

Resource Manager Microsoft Outlook Add-on can be directly installed on a client computer.

### Procedure

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- Step 1** Before installing the Resource Manager Microsoft Outlook Add-on, in the Resource Manager component of Cisco Unified Videoconferencing Manager, perform the following actions:
- Choose **Outlook Scheduling** in **User > My Profile > My Info**.
  - Make sure that User ID, email address, and password settings are the same in My Profile as they are for the Microsoft Outlook server. This does not apply if you are using an external directory.



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**Note** To access your user profile via the Resource Manager Web-interface, use the Resource Manager credentials provided by the system administrator.

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- Step 2** Shut down all applications running on the computer, including Microsoft Outlook.
- Step 3** Run the file **\_outlook\_addon\_setup.msi**.  
The Integration Setup Wizard window for the add-on appears.
- Step 4** Choose an installation location for the add-on, in the Select Installation Folder window.
- Step 5** Follow the wizard instructions to complete the add-on installation process.  
When the installation process is complete, a message appears confirming whether or not the installation was successful.
- Step 6** Start **Microsoft Outlook** on the client machine, after the installation is successfully completed.

# Configuration

To configure Resource Manager Microsoft Outlook Add-on, use the following procedure:

### Procedure

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- Step 1** Start **Microsoft Outlook**.
- Step 2** In **Tools**, choose **Options > Rich Media**.

- Step 3** Choose **Make the CUVCM schedule form the default scheduling form for all new meetings** to enable Resource Manager meeting scheduling from Microsoft Outlook.



**Note** When you schedule a new meeting in Microsoft Outlook Calendar, a Rich Media tab appears between the Outlook Appointment and Scheduling tabs.

- Step 4** Enter the Resource Manager server URL in the Web Site field.

- Step 5** Enter your Resource Manager login ID in the User ID field.

- Step 6** Enter your Resource Manager password in the Password field.



**Note** If you choose **Enable Single Sign-On** when you install Resource Manager, the User ID and Password values are not used for login authentication.

- Step 7** Enter your Resource Manager organization login ID in the Organization field.

The Resource Manager Microsoft Outlook Add-onCisco Unified Videoconferencing Manager application appears.

- Step 8** In the Resource Manager, make sure that the CUVCM icon appears in the Microsoft Outlook Calendar toolbar and in the Microsoft Windows Control Panel in the Add/Remove Programs list.



**Note** When a user account is created by a system administrator in Resource Manager, the user receives an email that includes the following information: server URL, user ID, password, and organization login ID. For LDAP users, the information should match the Microsoft Windows login ID, password, and domain name.

## Scheduling Meetings

The following section contains information about scheduling meetings in Resource Manager Microsoft Outlook Add-onCisco Unified Videoconferencing Manager.

### Accessing the Appointment Form

To access the appointment form, use the following procedure:

#### Procedure

- Step 1** Open the **Calendar** in Microsoft Outlook.
- Step 2** Click the icon in the Microsoft Outlook Calendar toolbar or schedule a meeting as you usually would in Microsoft Outlook, to open a New Appointment.
- Step 3** Use one of the following methods, depending on the system configuration, to open an Resource Manager Microsoft Outlook Add-on **Appointment** used to create a meeting:

- Click **New** to open a new meeting, if the add-on appointment form is configured as the default form.
- Click the icon in the Microsoft Outlook Calendar toolbar, if the add-on appointment form is not configured as the default form.

The Appointment form contains the following tabs:

- Appointment—Same as the default Appointment tab in Microsoft Outlook.
- Rich Media—Enables scheduling of an audio or video meeting.
- Scheduling—Same as the default Scheduling tab in Microsoft Outlook.



**Note** You can schedule, reschedule, and single meeting, recurring meeting, or current meeting in the same way as you would in Microsoft Outlook.

## Using the Rich Media Tab

On the Rich Media tab, you can specify audio and/or video meeting resources for the meeting you are scheduling.

### Procedure

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- Step 1** Choose **This is an online rich media meeting** to activate the Rich Media tab.
- Step 2** Choose a meeting type for the meeting.
- Step 3** You can specify a Meeting ID.  
A meeting ID is automatically generated.
- Step 4** Use the Attendees Settings section in the same way as **User > Meeting Scheduling > Attendees Settings** in the Resource Manager Web-interface, with the following exceptions:
- Choose **Don't include me in the meeting** check box to remove yourself (the meeting organizer) from the meeting.
  - The meeting organizer is always included in the Participant list regardless of whether or not, in the My Profile section, the Don't include me in the meeting check box is chosen.
  - After a meeting is scheduled, a Dial-in Information column appears for each attendee which includes the dial-in method the attendee should use to join the meeting.
- Step 5** Use the Advanced Settings section in the same way as **User > Meeting Scheduling > Advanced** in the Resource Manager Web-interface, with the following exception:
- There is no Time Zone field. The local time zone of the meeting organizer is used.
- Step 6** Click **Send** to schedule a new meeting or click **Send Update** to modify an existing meeting.
- If network resources and required resources are available, the meeting is automatically scheduled and a notification is sent to all participants, along with a request for a response to the meeting invitation.
- If network or other required resources are not available, an unable-to-schedule message appears, along with a reason for the scheduling failure. Email notifications are not sent to meeting invitees.
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# Meeting Notification

Every invitee to an appointment created with the Resource Manager Microsoft Outlook Add-on should receive an email notification that lists meeting details, invited participants, and a request for confirmation of participation.

**Note**

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Email notification format depends on the meeting-creator type. If the meeting-creator is a Web user, email notifications are in HTML format. If the meeting-creator is a Microsoft Outlook user, email notifications are in VCAL format.

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## Responding to a Meeting Invitation

Responding to a meeting invitation updates the meeting information in Resource Manager. To respond, use one of the following actions:

- Click a meeting name in User > My Meetings > Upcoming Meetings to open the Meeting Details window, then click **Accept**, **Tentative**, or **Decline**.
- In the email notification, click **Accept**, **Tentative**, or **Decline**.

**Note**

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If a user does not respond to a meeting invitation sent from Resource Manager Microsoft Outlook Add-on, a red flag appears in User > My Meetings > Upcoming Meetings for that specific user. The server is not updated and the terminal is not called at the time of the meeting. If the user responds, the flag does not appear.

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## Limitations

The following are limitations of the Resource Manager Microsoft Outlook Add-on limitations:

- A meeting scheduled in Microsoft Outlook can only be modified in the Microsoft Outlook interface.
- Once a meeting is scheduled, you cannot modify its recurrence pattern. To modify the recurrence pattern, delete the recurring meeting, and then schedule a new recurring meeting. Modification of the recurrence pattern includes changing parameters of the recurrence:
  - Interval (weekly, monthly, or yearly)
  - Number of recurrences
  - Start and/or end date

