CHAPTER 3

Scheduling Meetings

This section describes how to schedule a meeting by defining the time of the meeting, inviting participants, and defining participant settings. You can schedule a new meeting by configuring the fields in the Meeting Scheduling windows or by loading an existing virtual room template.

Accessing Meeting Scheduling

To access the Meeting Scheduling section, in the User sidebar, click **Meeting Scheduling**.

The Schedule a New Meeting section contains the following tabs

Table 3-1 Schedule a New Meeting tabs

Tab	Description
Meeting	Displays meeting information, such as the meeting type, and the date and time of the meeting, and whether or not the meeting is a recurring meeting.
Invite	Displays a list of available participants and a list of selected participants.
Attendees Settings	Displays the settings for meeting participants. This tab is hidden by default.
Attendees Availability	Displays a calendar with the availability of selected attendees. This tab is hidden by default.
Advanced	Displays advanced options for meeting templates. This tab is hidden by default.

Note The Attendees Settings, Attendees Availability, and Advanced tabs are hidden by default and are activated via Advanced Settings > Look and Feel.

Using the Meeting Tab

On the Meeting tab, you name and define the new meeting.

Step 1 In the User sidebar, click **Meeting Scheduling**.

The Schedule a New Meeting window opens on the Meeting tab by default.

Step 2 In the Subject field, enter a meeting subject.

Step 3 In the Bill To field, select **Host**, **All Participants** or **Organizer.** The cost of the meeting is billed accordingly.

Note The Bill to field is displayed on the Advanced tab by default but can appear on the Meeting tab if configured to do so.

Step 4 If required, edit the meeting ID that appears automatically in the Meeting ID field. If you do not provide a meeting ID, a random meeting ID is generated.

Step 5 In the Description field, enter a description of the meeting for future reference.

Note Meeting ID and Description fields are displayed on the Meeting tab by default but can appear on the Advanced tab if configured to do so.

Step 6 From the Meeting Type list, select a meeting type.

A default meeting type can be set in the Admin > Advanced Settings section.

If you select One Button from the Meeting Scheduling button list on the Look and Feel tab, then on the Meeting tab, the default start time is Now.

If you do not select One Button, when you click Meeting Scheduling, an option menu appears that includes Normal, Recurrence, and Ad Hoc. Choose one of the options to schedule a meeting.

Step 7 To change the Now default start time, click the calendar button beside the Start Time field. In the window that opens, select a start date and precise start time for the meeting.

Step 8 Click **Now**, if you want to return the meeting start-time back to the default Now.

Step 9 After making your selections, click **OK**.

Step 10 Enter a meeting duration time in **Duration**. This value overrides the meeting duration default that appears in the Duration field and which is set in the Admin > Advanced Settings > Default Meeting Settings.

Step 11 To schedule a recurring meeting, click **Recurrence**. In the Recurrence Pattern window that opens, define the recurrence details for the meeting.

Step 12 Click **Resource Availability** to view the MCU resources available in the network for a particular meeting type. The MCU resources are displayed with the number of conferences, and used and available ports, for a given time period of time.

If all required resources are available, the meeting is automatically scheduled and notifications are sent to all participants.

If network resources are available but non-required resources are not, the meeting is automatically scheduled, notifications are sent, and a conflict list is created for the meeting organizer.

Note The format in which Resource Manager sends e-mail notifications depends on the type of meeting creator. If the meeting creator is a web user, the e-mail notification is in HTML format. If the meeting creator is a Microsoft Outlook user, the e-mail notification is in VCAL format.

Step 13 To proceed with configuring other meeting scheduling settings, if required, click **Next**.

Using the Invite Tab

On the Invite tab, you designate required meeting participants.

Procedure

Step 1 In the User > Meeting Scheduling section, click the **Invite** tab.

Note To open the Invite tab directly, you must complete required fields and selections on the previous tab in Meeting Scheduling.

Step 2 To search for person or terminal to invite to the meeting, in the Names field, enter a name.

Step 3 To select the source from which to search for resources or participants, from the Select From list, select Organization Groups, Address Book or All Terminals.

Note The Address Book option is displayed if the Personal address book option is enabled in Admin > Advanced Settings > Look and Feel and there are entries under your Address Book. By default, either the Organization Groups or Terminals option is selected. This is determined by the Invite Attendees By field in the Admin > Advanced Settings > Look and Feel window.

Step 4 The list of Available Participants can include either users or terminals depending on the selection in the Select From list. Use the arrow buttons at the top-right side of the Available Participants section to browse through the list.

Step 5 To move participants to or from Available Participants and Selected Participants, use the arrow buttons between the two sections.

Step 6 To invite a user or terminal, make selections from the Available Participants list, and move them to the Selected Participants list.

Step 7 To add guest participants not included in the Available Participants list, in the lower section of the Invite tab enter the required information about the participant. To add the participant to the Address Book, check **Save to my address book**.

Note To add a user, you must provide at least the email address of the user.

Step 8 To add a terminal, you must at least provide the number for that terminal.

Step 9 To test the settings, click **Test**.

A message appears detailing the test results. If the test fails, you must adjust the meeting settings.

Step 10 To proceed with configuring other meeting scheduling settings, if required, click **Next**.

Using the Attendees Settings Tab

Note The Attendees Settings tab is hidden by default. It can be enabled in the Attendees Settings tab field on the Look and Feel tab.

On the Attendees Settings tab, you set settings for each meeting participant.

Procedure

Step 1 In the Meeting Scheduling section, click the Attendees Settings tab.

Step 2 To grant control privileges to an individual attendee, check the **CTRL** check box. To grant control privileges to all attendees, click the top **CTRL** check box.

If the CTRL check box is not checked, only the Administrator and Meeting Operators have in-meeting control rights. Only profiled users may have control privileges. For guest users and terminals, the CTRL check box is disabled.

Step 3 To assign or change the assignment of a terminal for an attendee, click the **link** for that attendee in the Terminal column.

Step 4 In the Select Terminal window that opens, select a terminal from the list or add an external number. You can browse the list using the arrow button above the list. To add an external number, click **Specify custom terminal**, enter the required terminal name, and then click **OK**.

Step 5 If a terminal is a Dual IP/ISDN terminal and is designated as an ISDN connection for the meeting, check **Dual IP/ISDN**. For non-Dual IP/ISDN terminals, the check box is disabled.

Step 6 Choose **Dial-in** for dial-in attendees. The default dial mode is determined by the Default Dialing Mode field in the Default Meeting Settings window.

Step 7 If a terminal is expected to be dial-in, select **Dial-in** for the terminal.

Note By default the email address of the attendee is displayed in the Email Address column. For user attendees, the user's email address is used, and for terminal/room attendees, the email address of the terminal/room is used. Alternatively, the meeting room that contains the terminal can be displayed in place of the email address, according to the selection in the Display field on the Look and Feel tab.

Step 8 From the View list, select a view and layout for each terminal. You can view available layouts in the Layouts display by clicking on the numbered side-tabs. If you want to see the view that is currently assigned to the terminal, click **Layout** at the top-right of the Layouts display. The views that are available are dependant on the service selected for the meeting.

Step 9 To include a terminal name in a specific subframe of the screen layout at the start of the meeting, drag and then drop the Change Layout icon (located to the right of the View column for each terminal) into the Layouts display.

The terminal name appears in that subframe of the Layouts display.

Step 10 From the Initial Controller list, select a participant as the meeting controller.

Step 11 From the Host list, select a host for the meeting. A host can be either a user or a terminal.

Step 12 To proceed with configuring other meeting scheduling settings, if required, click **Next**.

Note For a Non Video Conference, only Attendee names and email addresses are displayed. For a Point to Point Conference, the attendees list should contain only two terminals.

Using the Attendees Availability Tab

Note The Attendees Availability tab is hidden by default. It can be enabled in the Attendees Availability tab field on the Look and Feel tab.

On the Attendees Availability tab, you can monitor user (attendee) and terminal availability, and in the case of Non Video Conference, room availability. The legend at the top left of the window explains that T means "Terminal" and that U means "User." In the case of a Non Video Conference, R means "Room." Purple represents "Busy" and white represents "Free." A four week time-period is displayed, beginning from the week that the meeting is scheduled to occur (no earlier than the present time). The information on the Attendees Availability tab is read-only.

Using the Advanced Tab

Note The Advanced tab is hidden by default. It an be enabled via the Advanced tab field on the Look and Feel tab.

On the Advanced tab, you can configure advanced meeting options. Defaults for all settings on the Advanced tab are set in Admin > Advanced Settings, on the Default Meeting Settings tab.

Procedure

Step 1 In the Meeting Scheduling section, click the **Attendees Settings** tab.

Step 2 In the Bill To field, select Host, All Participants or Organizer. The cost of the meeting is billed accordingly.

Note The Bill To field is displayed on the Advanced tab by default but can appear on the Meeting tab if configured to do so.

The Reference Code and Password fields are displayed on the Advanced tab by default but can appear on the Meeting tab if configured to do so.

Step 3 In the Reference Code field, enter a reference code for the specified meeting. This code is used to identify a meeting record if the record exists in the external system.

Step 4 For password protection for the meeting, in the Password field, enter a password. All dial-in participants in the meeting must use this password.

If the user accesses the In-Meeting Control window using a conference number and this password, the user is not granted control rights.

Step 5 To set the chair-control password for DTMF control, enter the password in the Chair Control Password field. If a user access the In-Meeting Control window via a conference number and chair-control password, the user is not granted chair-control rights.

Step 6 If you require additional resources for guests, in the Additional Reservations section, enter the number of IP and ISDN guest participants for which the system should reserve resources.

In Total Reservations, the total number of reservations is displayed.

Step 7 In the Terminate Meetings section, check the following options according to your requirements

- At scheduled time—To terminate the meeting according to the termination time selected on the Meetings tab.

Alert n minutes before termination—Enter a value in minutes. The end-of-meeting warning is received by terminals n-minutes before the scheduled termination of the meeting.

- n minutes after all terminals have left—Enter a value in minutes. The meeting terminates n-minutes after the last terminal leaves the meeting.
- n minutes after the host terminal has left—Enter a time in minutes. The meeting terminates n-minutes after the host terminal leaves the meeting.
- Auto Extend—The meeting continues until it is manually ended via the in-meeting control panel or until there is no resource to which to automatically extend the meeting, whichever occurs first.

Step 8 To prevent dial-in terminals from connecting to the meeting, check **Block Dial-in**.

Step 9 To allow uninvited PSTN/ISDN terminals to dial into the meeting, check **Admit unresolved PSTN/ISDN terminals**. An uninvited PSTN/ISDN terminal indicates that the uninvited terminal was not on initial Invite list when the meeting was originally scheduled. Unresolved terminals are not allowed to dial into a meeting if the check box is unchecked but Resource Manager can still dial out to any resolved PSTN/ISDN terminals.

Step 10 If you do not want the meeting to begin without the host, select **Start only when host joins**.

Note The default settings for the fields on the Advanced tab are located in Admin > Advanced Settings > Default Settings.

Step 11 To override the setting for the terminal name to be included in video display at the start of a meeting, check **Overwrite terminal display name**. This option is unchecked by default.

Note The original setting for the display of the terminal name is located in Admin > Advanced Settings > Default Meeting Settings.

Step 12 From the Prioritize list, select the priority by which meetings are scheduled and which is used in meeting templates by default. This is an important factor in creating efficient conferences. Select from the following options:

- Local MCU—A local MCU is selected to save communications costs and save time due to reduced distance of routed calls. This mode also supports dynamic cascading of a live MCU conference and therefore allows the conference to grow in size dynamically.
- Bandwidth—Allocates resources to conserve bandwidth. In some cases, this may cause a meeting to be cascaded to conserve bandwidth, even though a single MCU is available which can host the meeting.
- Delay—Allocates resources that ensure the best quality for the meeting. This implies that calls are directed to a single MCU, whenever possible.

Step 13 From the Required list, select the default resources required for the meeting to be confirmed. A meeting is not allowed if these resources are not available at the time of the meeting. If you select **None**, Resource Manager confirms available network resources and then reports any availability issues regarding attendees, rooms, or terminals.

- None—Only network resources (such as MCU, Gateway, Gatekeeper) are checked. A meeting can be successfully scheduled even if participating users, terminals and rooms have scheduling conflicts.
- All Resources—User, terminal, and room availability, in addition to network resources, are taken into account when scheduling the meeting.
- All Rooms— Room availabilities are taken into account, in addition to network resources.
- All Rooms & Terminals—Room and terminal availabilities are taken into account, in addition to network resources.
- All Terminals—Terminal availabilities are taken into account, in addition to network resources.

Step 14 If you want to change the Default Time Zone for the meeting, select a time zone from the list.

Testing and Completing the Scheduling

When you have completed all selections in the Meeting Scheduling windows, you can complete meeting scheduling by testing, scheduling, and summarizing the meeting invitation.

Testing the Meeting Scheduling

To test the scheduling request, without actually scheduling the meeting, use the following procedure:

Procedure

Step 1 Click **Test** in the Meeting Scheduling window to test the scheduling without actually scheduling the meeting.

Step 2 If the scheduling request fails, change the scheduling parameters and then re-test.

Scheduling the Meeting

After testing is successful and you have modified all settings to suit your requirements, you can actually schedule the meeting in the system, by using the following procedure:

Procedure

Step 1 Click **Finish** in the Meeting Scheduling window to actually schedule the meeting and complete the scheduling process,

Step 2 If the meeting cannot be scheduled, a message appears in which you can choose an alternative time slot for the meeting, if a time slot is available.

Step 3 If no alternative time slot is available, click **Back** to return to the Meeting Scheduling windows where you can modify your selections.

Meeting Summary

If a meeting is successfully scheduled, a Meeting Summary window appears The meeting summary contains the date, time and duration of the meeting, as well as dialing information for all attendees. The Meeting Summary screen can be opened from the Meeting window for an upcoming or past meeting record.

Advanced Concept in Meeting Scheduling

This section provides information about Lecture Mode and Waiting Room modes.

Lecture Mode

Lecture mode is only available to meeting types downloaded from an MCU that contains at least two views. There is no need to manually configure participant layout on the Attendees Settings screen. If the administrator defines these meeting types as being in Lecture mode, then when a user schedules a meeting using one of these meeting type, the host is designated as the lecturer, and the participants and the host see each other.

Waiting Room

If you schedule a meeting and select the option **Start only when Host joins**, then the meeting starts in Waiting Room mode. Terminals that join the meeting cannot see or hear others. When the host terminal joins the meeting, the waiting room mode is removed, and all participants can see and hear each another.

Alternatively, you can take a meeting out of waiting room mode by accessing the In-Meeting Control window as a host or with a chair-control password. This allows you to have control rights to the In-Meeting Control window. Take control of the meeting and then click the waiting room icon to bring the meeting out of waiting room mode.

Scheduling Built-in Meetings

This section provides information about scheduling built-in meeting types.

Schedule Built-in Meeting Types

- **Non Video Conference Meeting Type—**If you choose this meeting type, only users and meeting rooms are scheduled for a meeting. No terminals are involved.
- **Point to Point Meeting Type**—If you choose this meeting type, only two terminals are scheduled for a meeting and there is no use of MCU ports for the meeting.
- **Continuous Presence** or **Voice Activated Meeting Types—**These meeting types are available only if a Sony endpoint with an embedded MCU is defined in the system. To host the meeting on the embedded MCU, you must be one of the meeting attendees and select a Sony endpoint with an embedded MCU.

Endpoint Initiated Ad-hoc Conference

Note An endpoint-initiated conference is only allowed if you choose **Allow Endpoint Initiate Calls** in **Configuration Tool > System Configuration > Scheduling Settings**.

Point to Point Conference

An endpoint (terminal) that is registered to a gatekeeper managed by Resource Manager can initiate a point to point conference by dialing another endpoint (terminal) registered to a gatekeeper managed by Resource Manager.

Multipoint Conference

Note An endpoint initiated multi-point conference is only allowed if you choose **Allow Endpoint Initiate Multipoint Calls** in **Configuration Tool > System Configuration > Scheduling Settings**.

An endpoint (terminal) registered to a gatekeeper that is managed by Resource Manager can initiate a conference via a dial string. The dial string should consist of the meeting type prefix and the actual meeting ID.

For example, a user can create a conference from his endpoint (terminal) by dialing 856789 where 85 is the meeting type and 6789 is the conference ID. Other users can join this conference by dialing 856789 or 6789.

A user can also specify the meeting password and invited participants using the MCU default behavior. For example, a user can create a conference with meeting password 1111 and invite endpoint 5656. The user should dial 856789**5656***1111. By default, ** is the MCU delimiter for inviting an endpoint to a conference, and *** is the MCU delimiter for the meeting password.

Note The MCU delimiters can be different if they are customized through configuration.

Viewing an Endpoint Initiated Meeting

Since endpoint-initiated meetings are created directly from an endpoint, there is no direct user involvement. Resource Manager matches a participating endpoint with its associated user. If a user is found, the endpoint-initiated meeting is displayed in **User > My Meetings**. All endpoint-initiated meetings are also listed in **Admin > All Meetings**.

Advanced Option

An endpoint-initiated meeting is by default 30 minutes long. It is automatically extended for as long as participants are still in the meeting. The priority for an endpoint-initiated meeting is always **Local First**.

Note In order for endpoint-initiated point-to-point conferences not to conflict with endpoint-initiated multi-point conferences, names of endpoints registered to gatekeepers in Resource Manager cannot start with the same prefix as the MCU service or as a meeting type prefix in Resource Manager.

Endpoint Initiated Conference Using Sony Endpoint with Embedded MCU

To create a multi-point meeting on a Sony endpoint with an embedded MCU, go to the Web interface of the Sony endpoint. In the Dial/Disconnect section, choose **Multipoint** in the Line I/F field to create a multi-point conference.