CHAPTER 13

Modifying Default Organization Settings for Resource Manager Users and Meetings

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About Settings Priorities

When configuring advanced settings, note the following priority rules:

- Changes to an individual user profile override default settings
- Settings you make for a meeting during scheduling override settings in a virtual room
- Settings in a virtual room override default meeting settings

How to Define Default Settings for Organization Users

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Defining Which Meeting Types are Available to New Users

Procedure

Step 1 Click **Advanced Settings** in the sidebar menu.

Step 2 Click **Default User Settings**.

Step 3 Select a meeting type in the Available Meeting Types list that you want to make available to new users.

Step 4 Use the right-pointing arrow to move the meeting type to the Selected Meeting Types list.

We recommended that you select all available meeting types.

Non-Video Conference and Point-to-Point meeting types are default meeting types in Resource Manager. They do not exist on the MCU.

Step 5 If you want all users to have access to the selected meeting types, select **Update Meeting Types for All Users Now**.

All user profiles are updated to reflect the new default values.

Step 6 Deselect **Update Meeting Types for All Users Now** if you want only new users to have access to the selected meeting types.

When you save the settings, only default settings in the profiles of new users change.

Step 7 Click **OK** to save your changes.

Defining a Default Time Zone for a User

Procedure

Step 1 Click **Advanced Settings** in the sidebar menu.

Step 2 Click **Default User Settings**.

Step 3 Select a default time zone for the selected meeting types.

Step 4 Select **Update All Users Now** if you want the default time zone to appear for all users.

Step 5 Deselect **Update All Users Now** if you want the default time zone to appear for new users only.

Step 6 Click **OK** to save your changes.

Defining Display Formats

Procedure

Step 1 Click **Advanced Settings** in the sidebar menu.

Step 2 Click **Default User Settings**.

Step 3 Select an option from the Name Display Format list to change the way user names are displayed in meeting-related information and in the meeting video display.

Step 4 Select **Last name** or **First name** from the Sort by list to change the sort order for participant name columns.

Step 5 Click **OK** to save your changes.

Defining Date Display Formats

Procedure

Step 1 Click **Advanced Settings** in the sidebar menu.

Step 2 Click **Default User Settings**.

Step 3 Select an option from the Date Display Format list to change the way dates are displayed in meeting-related information and in the meeting video display.

Step 4 Click **OK** to save your changes.

Defining Your Meeting Display Preferences

Procedure

Step 1 Click **Advanced Settings** in the sidebar menu.

Step 2 Click **Default User Settings**.

Step 3 Click **Display all meeting records on My Meetings screens** to display all meetings within the organization in My Meetings.

Step 4 Click **OK** to save your changes.

How to Define Default Settings for Meetings

On the Default Meeting Settings tab, the Organization Administrator sets which default values are available to users when scheduling meetings or defining virtual rooms.

When a new meeting is scheduled, default settings configured in the Default Meeting Settings tab also appear in the Meeting Scheduling tab.

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Defining a Default Meeting Type

Procedure

Step 1 Click **Advanced Settings** in the sidebar menu.

Step 2 Click **Default Meeting Settings**.

Step 3 Select a default meeting type from the Meeting Type list or all new meeting templates and new meetings.

Step 4 Click **OK** to save your changes.

Defining the Default Cascading Mode

Procedure

Step 1 Click **Advanced Settings** in the sidebar menu.

Step 2 Click **Default Meeting Settings**.

Step 3 Set Allow Cascaded Meeting to **Yes** to enable Resource Manager to automatically create cascaded meetings on the MCUs.

Set to No to instruct Resource Manager to create only meetings no larger than the capacity of a single MCU/EMP card. Resource Manager will not cascade two MCU conferences together to increase conference size or save network bandwidth.

When set to No, the Prioritize field is disabled.

Step 4 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. The options are

- Local MCU
- Bandwidth
- Delay (for more information, see the "Configuring Cascading" section on page 4-1)

Step 5 Click **OK** to save your changes.

Defining How to End a Meeting

Procedure

Step 1 Click **Advanced Settings** in the sidebar menu.

Step 2 Click **Default Meeting Settings**.

Step 3 Select **At scheduled time** to terminate the meeting according to the termination time define for the meeting.

Step 4 Enter a value in the **Alert n minutes before termination** field to indicate the length of time before the scheduled termination of the meeting that terminals receive the end-of-meeting warning.

At the defined length of time before the end of the meeting, an audio alert message is played to the meeting participants. The only way to extend the meeting is to do it manually in the In-meeting Control screen.

Step 5 Select **n minutes after all terminals have left** to terminate the meeting only a defined period of time after the last terminal leaves.

Resource Manager automatically extends the meeting as long as meeting participants are still connected to the meeting, and there is no resource conflict with upcoming scheduled meetings.

Step 6 Enter the required value in the **n minutes after all terminals have left** field.

By default, you cannot automatically extended Resource Manager meetings to last more than 4 hours. Administrators can change this default via Resource Manager Configuration Tool > System Configuration > Scheduling Settings > Maximum Length of Meeting Extension.

Step 7 Click **OK** to save your changes.

Defining the Meeting Default Length

Procedure

Step 1 Click **Advanced Settings** in the sidebar menu.

Step 2 Click **Default Meeting Settings**.

Step 3 Enter the default length of a meeting in minutes in the Duration field.

Step 4 Click **OK** to save your changes.

Defining the Default Dialing Mode

Procedure

Step 1 Click **Advanced Settings** in the sidebar menu.

Step 2 Click **Default Meeting Settings**.

Step 3 Select **Dial-out** or **Dialing-in** from the Default Dialing Mode list.

Step 4 Click **OK** to save your changes.

Defining a Billing Destination

Procedure

Step 1 Click **Advanced Settings** in the sidebar menu.

Step 2 Click **Default Meeting Settings**.

Step 3 Select **Host**, **All Participants** or **Organizer** in the Bill To field.

If the host and the organizer are the same person, the Organizer option does not appear.

The cost of the meeting is billed accordingly.

The selection in the Bill To field determines the default setting in the Virtual Room and Meeting Scheduling screens.

Step 4 Click **OK** to save your changes.

Defining Required Default Resources

Procedure

Step 1 Click **Advanced Settings** in the sidebar menu.

Step 2 Click **Default Meeting Settings**.

Step 3 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.

You can choose to require that participating users, rooms, or terminals cannot be double booked for a meeting before you can successfully schedule a meeting.

Step 4 Click **OK** to save your changes.

Customizing Invitation E-mail

You can customize the content of the invitation e-mail that participants receive when a meeting is scheduled, modified or cancelled.

Procedure

Step 1 Click **Advanced Settings** in the sidebar menu.

Step 2 Click **Default Meeting Settings**.

Step 3 (Optional) Select **Customize the 'meeting invitation' introduction message** and then enter your text to override the introduction message in the initial meeting invitation e-mail.

Step 4 (Optional) Select **Customize the 'meeting update' introduction message** and enter your text to override the introduction message in the meeting update e-mail.

Step 5 (Optional) Select **Customize the 'meeting cancellation' introduction message** and enter your text to override the introduction message in the meeting cancellation e-mail.

Step 6 (Optional) Select **Override IP Terminal Access Information** and enter your text to override default access information for IP terminals.

Step 7 (Optional) Click **Meeting ID** to insert meeting ID placeholders into the text.

Step 8 (Optional) Select **Override ISDN/PSTN/Mobile Terminal Access Information** and enter your text to override default access information for ISDN/PSTN/Mobile terminals.

Default access information for ISDN/PSTN/Mobile terminals consists of access information for all gateways configured in Resource Manager.

Step 9 (Optional) Click **Meeting ID** to insert meeting ID placeholders into the text.

Step 10 (Optional) Select **Hide the Attendees list** to hide the attendees section in the invitation e-mail.

Step 11 (Optional) Select **Hide dial-in information for attendees** to hide only the dial-in access information for each attendee when Hide the Attendees list is deselected.

Step 12 Click **OK** to save your changes.

Modifying the Look and Feel of the Resource Manager Web User Interface

Procedure

Step 1 Click **Advanced Settings** in the sidebar menu.

Step 2 Click **Look and Feel**.

Step 3 Use the **Meeting Scheduling button** list to select either of two different ways to schedule the three types of meetings supported by Resource Manager.

- One Button—When the user clicks Meeting Scheduling in the sidebar menu, the Basic tab appears.
- Sub Menu—When the mouse is over Meeting Scheduling in the sidebar menu, a sub-menu appears that contains three scheduling options: Normal, Recurrence, and Ad-Hoc.

Step 4 Select **Visible** or **Hidden** to determine whether the following fields are displayed or hidden at Meeting Scheduling > Basic:

- PIN
- Waiting Room
- Record Meeting
- Streaming
- Description
- Bill To
- Reference Code

Step 5 Select **Visible to Meeting Organizer** or **Hidden from Meeting Organizer** to determine whether the Attendees Settings tab, the Attendees Availability tab and the Advanced tab are displayed or hidden on the Meeting Scheduling tab.

Step 6 Use the Invite Attendees By field to indicate whether to invite users or terminals by default at Meeting Scheduling > Invite.

Step 7 Select **Visible** or **Hidden** to determine whether the Reserved Ports field is displayed or hidden at **Meeting Scheduling** > **Invite**.

Step 8 Select **Visible** or **Hidden** to determine whether the Reserve Additional Ports field is displayed or hidden at Meeting Scheduling > Invite.

Step 9 Select **Visible** or **Hidden** to determine whether the Attendees Settings tab, the Attendees Availability tab and the Advanced tab are displayed or hidden on the Meeting Scheduling tab.

Step 10 Select **Visible** or **Hidden** to determine whether the PSTN/ISDN and Dial-in columns are displayed or hidden at Meeting Scheduling > Attendees Settings.

Step 11 Determine whether attendee terminal settings are editable or read-only at Meeting Scheduling > Attendees Settings. The Attendee Terminal Settings option determines whether or not a meeting organizer can change the default association between an attending user and his/her default terminal when scheduling a meeting.

Step 12 Select **Visible** or **Hidden** to determine whether the following are displayed or hidden at Meeting Scheduling > Advanced:

- Bill To
- Reference Code
- Customize Reference Code Field Label—Determines the label used for the Reference Code field.
- Enforce Reference Code Entry—Determines whether or not the reference code is mandatory.
- Field Type—Determines the type of content that can be entered in the Reference Code Entry field.
- Field Length—Determines the length of the value entered in the Reference Code field.
- Enforce Full Length—Determines whether or not the full Reference Code field length is used.

Step 13 Select **Visible** or **Hidden** to determine whether the following are displayed or hidden in the In-meeting Control interface:

- Statistics tab
- Extend Meeting option
- Terminal Invitation option
- Advanced Invitation tab
- Terminate Meeting option
- Layout Control—Determines whether the layout control panel is displayed or hidden.
- Hide Meeting Room—Determines whether or not the Meeting Room tab is hidden in the Resource Management section.
- Hide Meeting Notification E-mail for meeting rooms and terminals—Determines whether or not e-mail and time zone fields for meeting rooms and terminals are enabled. If meeting rooms and terminals are enabled, they can directly receive notification e-mails.
- Show My Profile—Determines whether or not the My Profile section is displayed.
- Enable Personal Address Book—Determines whether or not the Address Book section is displayed.
- Play a sound upon scheduling failure—Plays a warning sound in the event of a meeting scheduling failure.
- Use Full Screen Display—Determines whether or not the Resource Manager user-interface is displayed full-screen after login.

Step 14 Click **OK** to save your changes.