



# Cisco TelePresence Management Suite Extension for Microsoft Exchange

## User Guide

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# Introduction

Cisco TelePresence Management Suite Extension for Microsoft Exchange (Cisco TMSXE) is an optional add-on to Cisco TelePresence Management Suite (Cisco TMS). It works as a plug-in to Microsoft Exchange and allows end users to book videoconferences using the same steps as booking traditional meeting rooms and resources. Conferences booked using Cisco TMS will also be synchronized to Exchange calendars.

This guide is intended for end users, in particular those making use of the Cisco form. Administrators should also refer to:

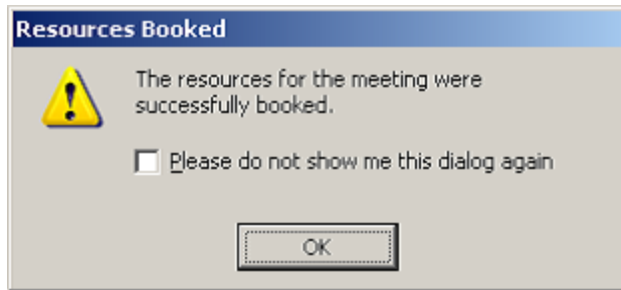
- *Cisco TelePresence Management Suite Extension for Microsoft Exchange Installation Guide* for guidance on installing and configuring the software
- *Cisco TelePresence Management Suite Extension for Microsoft Exchange Administrator Guide* for a software reference, functional overview, and troubleshooting tips

# Creating a new meeting

**CAUTION:** Creating a meeting request from the resource's calendar is not supported. Resource calendars may be used for free/busy information only.

1. Create a new meeting invitation from your calendar. A new invitation can be started :
  - via the **New > Meeting Request** button in your toolbar
  - from the menu by going to **File > New > Meeting Request**
  - by double-clicking a time-slot in your calendar.

Note that if you do not see the **To:** line and button, you have opened an appointment request rather than a meeting request; however, it can be turned into a meeting by inviting one or more users in the **Scheduling** tab.
2. Using the drop-down menus, set the **Start** and **End** time for your meeting. If your meeting will be a recurrent meeting, click the **Recurrence** button to set the options for the meeting.
3. Click the **To:** button to invite attendees. Using the **Show Names** from the drop-down, you can choose from various address books created by the administrator to browse through.
4. Choose the people you wish to invite to the meeting by selecting their name, and clicking the **Required** or **Optional** buttons. Optionally you can type their name into the fields directly.
5. To book a room or video system, do the same as above to select a room/system but put them in the Resources field. You can mix and match people and rooms in a meeting request, including multiple rooms/systems. People go into **Required** or **Optional** fields, rooms/systems go in the **Resources** field. There is no need to try to book MCUs or Gateways, as they will be handled automatically by Cisco TMS.
6. Click **OK** to save the participants and return to the meeting request.
7. Click on the **Scheduling** tab, you can view the free/busy information for all of the meeting's invitees. Ensure everyone is free during the requested time period, or adjust the meeting's start and end times as necessary.
8. When finished, click **Send** to save the meeting and send out the invitations.
9. The booking process from here on varies slightly depending on which booking model and version of Exchange is used. If in doubt what is used in your organization, contact your administrator for assistance.
  - If your booking is rejected by one or more resources:
    - Exchange 2003: The meeting request will stay open.
    - Exchange 2007: Shortly after saving the meeting, you will receive one or more meeting reject notifications. You must reopen your original meeting request or create a new one to reschedule.
    - You will receive an email message from Cisco TMSXE providing additional detail on why the meeting was rejected.
    - Return to step 2 of this process and make any adjustments necessary before resubmitting your meeting request.
  - If your booking is successful:
    - Exchange 2003: When rooms/systems have been successfully booked and the meeting has been saved in your calendar, you will see the dialog below. Note that we recommend *not* opting to hide this dialog.



- Exchange 2007: Shortly after saving the meeting, meeting accept email notifications will arrive from the rooms and people you invited to the meeting.
- As the meeting organizer you will also receive an email message from Cisco TMSXE providing you with videoconference details, including dialing information.
- You can forward this message or copy the information into the meeting details and send out an update to invitees, if desired.

Conference settings such as bandwidth, and encryption will be set using the default parameters defined by the Conference Settings in Cisco TMS defined by the Cisco TMS administrator.

See [Modifying and deleting meetings](#) for additional guidance on sending updates.

## Adding a videoconference master

The videoconference master is the participant in the conference who is considered to be the "chair" and the one who will be prompted to start a manually connected conference, or extend the meeting if more time is needed.

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**Note:** Being the videoconference master relies on functionality not available for all types of endpoints. Therefore, not all endpoints are able to be the videoconference master.

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Cisco TMS will add the first videoconference resource in the **Location** field of your meeting request as the videoconference master. If this endpoint is not able to be the master, Cisco TMS will select the first resource on the list that is able to be the videoconference master.

This selection happens when the conference is booked and again if the location field is modified later.

# Modifying and deleting meetings

## Outlook

Meetings that have not yet started can be modified or deleted directly from your Outlook client if you are the meeting organizer.

### Modifying a meeting or series

1. Open the event in your calendar by double-clicking on it.
2. If the meeting is part of a recurring series, you will be asked whether you wish to edit just this occurrence, or the entire series. Make your selection and click **OK**.
3. Modify the meeting as desired, including changing the time, adding/removing participants, and so on.
4. When complete, click **Send Update** to save the meeting and send the changes to the meeting participants. Do *not* click **Save and Close** as this will only modify your own calendar.

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**CAUTION:** If you have modified the participant list, opt to *Send updates to all attendees* when prompted, or calendars will become out of sync.

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### Adding video resources to an existing meeting series

In order for Cisco TelePresence Management Suite to manage a series of telepresence meetings, it needs to know the recurrence pattern of your meeting series (weekly, monthly, every second Tuesday, and so on). Meetings that do not include video resources are not sent to Cisco TMS.

- If a recurrent meeting changes to include video, make sure to add the video resources to the entire series.
- If only one or some meetings out of a series will include video resources:
  - a. Cancel the occurrences in question using Outlook.
  - b. Re-book them as single meetings that include the video resources.

### Deleting a meeting or series

1. Find the event in your calendar, right-click on it and select **Delete** from the context menu.
2. If the meeting is part of a recurring series, you will be asked whether you wish to edit just this occurrence, or the entire series. Make your selection and click **OK**.
3. The next prompt will ask you whether or not to send a cancellation notice. Select *Send cancellation and delete meeting* and click **OK**. This is required to ensure that the meeting will be deleted from the other participant's calendars, including the rooms/systems.



## Cisco TMS

When a user books a meeting from Outlook that includes one or more Cisco TMS integrated rooms/systems, a Cisco TMS meeting is automatically created with the meeting organizer as meeting owner.

The meeting owner, or a Cisco TMS user with permissions to modify meetings for other users, can modify or delete bookings created in Outlook using Cisco TMS. Refer to the built-in help for assistance on how to do this.

When a meeting has been modified or deleted using Cisco TMS:

- The meeting owner will receive an email message with the updated conference information.
- All affected rooms/systems will have their calendars automatically updated.
- For security reasons, Cisco TMS and Cisco TMSXE do not have permissions to open or modify user calendars. Existing entries in user calendars will therefore not be updated.
- The meeting organizer must update their own calendar entry themselves.
- We recommend sending this update to all invited participants to ensure that their calendars are up-to-date. This is also a convenient time to add updated videoconference information to the meeting details.



# Using the Cisco form

When using regular Outlook booking for videoconferences, Cisco TMS will create the meeting using the default conference settings defined by the administrator. This includes bandwidth restrictions, password settings, encryption, and so on.

If the administrator has made it available to users, the Cisco custom form will show up as a button/tab in all your meeting requests. As a meeting organizer you can use this form to specify additional settings for the conference, override the conference defaults, and invite external video or audio participants.

The screenshot shows the Cisco form in Outlook, titled "Untitled - Meeting". The form is divided into several sections:

- Quality:** A dropdown menu set to "Default".
- Picture Mode:** A dropdown menu set to "Default".
- Reservation Type:** A dropdown menu set to "Default".
- Secure Conference:** A dropdown menu set to "Default".
- Display Option to Extend Meeting:** A dropdown menu set to "Default".
- Web Conference:** A dropdown menu set to "No".
- Billing Code:** A text input field.
- Password:** A text input field.
- Restrict ISDN:** A checkbox that is currently unchecked.
- External Participants:** A large empty text area.
- Notes:** A large empty text area.
- Buttons:** "Add External" button, "Save & Close", "Invite Attendees", "Delete", "Appointment", "Cisco", "Scheduling Assistant", "Free", "Recurrence", "Time Zones", "Categorize", "Spelling", and "Proofing".

To use the form for a new or existing meeting:

1. Select the calendar entry's **Cisco** tab and make changes as desired. Any values left as *Default* will use the default setting as defined in Cisco TMS by the administrator.
2. When you are done changing the settings, use the **Send Update** button when submitting changes to an existing meeting. Do *not* click **Save and Close** as this will only modify your own calendar.

## Description of form fields

A brief description of each setting in the form is included below. For further information on topics discussed here such as bandwidth, refer to the Cisco TMS documentation.

Setting	Description
<b>Quality</b>	The bandwidth to use for the conference. <i>Default</i> will use the default settings in Cisco TMS for ISDN, IP, and Telepresence calls, as configured by the administrator.

Setting	Description
<b>Picture Mode</b>	The video layout to use for a conference with more than two participants: <ul style="list-style-type: none"> <li>■ <i>Continuous Presence</i>: split screen and view all participants continuously.</li> <li>■ <i>Voice Switched</i>: see only the participant currently talking.</li> <li>■ <i>Enhanced CP</i>: the MCU will also use layouts such as 5+1 and 7+1.</li> </ul>
<b>Reservation Type</b>	Options: <ul style="list-style-type: none"> <li>■ <i>Reservation Only</i>: only the rooms are reserved.</li> <li>■ <i>Manual Connect</i>: conference routing is set up, but not automatically launched.</li> <li>■ <i>Automatic Call Launch</i>: the conference is routed and launched automatically.</li> </ul>
<b>Secure Conference</b>	The required encryption level of the conference. Setting to Yes requires that all participants support encryption for the conference to be booked or connected.
<b>Display Option to Extend Meeting</b>	Setting determines whether Cisco TMS will prompt the videoconference master of the conference to extend the meeting when the scheduled meeting is about to end. For more information on how this master is selected, refer to the section <a href="#">Adding a videoconference master</a> .
<b>Web Conference</b>	Whether to request a web conference with the meeting. The options are: <ul style="list-style-type: none"> <li>■ <i>Yes</i>: the meeting will only be booked if a web conference reservation can be included.</li> <li>■ <i>If possible</i>: the meeting will try to include a web conference, but will be booked regardless.</li> <li>■ <i>No</i>: do not request a web conference for the meeting.</li> </ul>
<b>Billing Code</b>	You can supply a billing code for the conference that will be saved with the meeting in Cisco TMS (this may be optional or required depending on Cisco TMS settings defined by your administrator).
<b>Password</b>	Specifying a password here will require dial-in conference participants to enter this password to join the conference, provided it is supported by the Multipoint Control Unit (MCU) being used. If in doubt, confer with your administrator.
<b>Restrict ISDN</b>	If enabled, the conference will use ISDN restrict (56kbps). A restricted call is a call to a 56 kbps network.
<b>Notes</b>	A free text area where notes about the conference can be added that will show up in the <b>Email Message</b> field in Cisco TMS and is included in the confirmation message. If a person is associated with the endpoint being booked, this person will also receive the note by email.
<b>Add External</b>	Use this button to add video or audio participants not listed in Exchange to the Cisco TMS booking. See <a href="#">Adding external participants</a> .

## Adding external participants

Using the Cisco form you can add video or audio participants that are not available in Exchange to your Cisco TMS conference.

- Dial-out participants: enter their contact information to have Cisco TMS automatically connect them to the conference at the scheduled time.
- Dial-in participants: Cisco TMS will reserve the resources needed to host the participants in the conference and provide you with precise dial-in information to forward to the participants.

To add dial-in or dial-out participants to your conference:

1. Open the Cisco tab.
2. Click **Add External** to display a panel where you can define the values for each participant.
3. Click either the **Dial-In** or **Dial-Out** tab.
4. Enter the values appropriate for the type of participant you are adding and click **Add**. The participant will appear in the **External Participants** list.
5. Repeat for each participant you wish to add to the meeting.

To delete dial-in or dial-out participants, select them from the list and click **Delete Selection**.

## Frequently asked questions

### Can I book a videoconference directly from a resource's calendar?

No, when booking video conferences, resource calendars should be used for referencing free/busy information only. Make the booking from your own calendar as the organizer.

### Can I book a meeting using the integrated rooms and not include a video call?

Yes, any meeting that only has one room/system included will automatically be booked as a "Reservation Only" booking, which means no video or routing resources have been scheduled for use.

If you are booking multiple rooms and do not want a videoconference, you can use the Cisco form to set **Reservation Type** to *Reservation Only*.

### Why do I not see any MCUs in my Outlook lists?

The addition of routing resources/Multipoint Control Units (MCUs) is automatic. Cisco TMS schedules these resources based on the number and type of participating systems.

### Can I book a meeting that only has external participants from Outlook?

No. In order to create a videoconference booking in Cisco TMS from Outlook, a minimum of one Cisco TMS integrated system must be included in the booking request.

### Can I book a web conference with no video resources from Outlook?

No. In order to create a videoconference booking in Cisco TMS from Outlook, a minimum of one Cisco TMS integrated system must be included in the booking request.

### Can I book a recording from Outlook?

Yes, you can book a recording device such as the Cisco TelePresence Content Server if the system has been integrated with Exchange. The content server will appear as a room and should be scheduled like any other room. If you need to customize the booking with specific recording aliases, you should create the meeting in Cisco TMS rather than using Outlook.

### Can I book meetings using Outlook Web Access?

Yes, if your Exchange server version is 2007, you can book videoconferences using Outlook Web Access (OWA). Note however that the Cisco form is not available when using OWA.

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## References and related documents

Documents and web sites referenced in this document are listed below.

All product documentation for Cisco TMSXE can also be found on our website:

[http://www.cisco.com/en/US/products/ps11472/tsd\\_products\\_support\\_series\\_home.html](http://www.cisco.com/en/US/products/ps11472/tsd_products_support_series_home.html)

<b>Title</b>	<b>Reference</b>
<a href="#"><i>Cisco TelePresence Management Suite Extension for Microsoft Exchange Release Notes (2.3)</i></a>	D14848
<a href="#"><i>Cisco TelePresence Management Suite Extension for Microsoft Exchange Installation Guide (2.3)</i></a>	D14846
<a href="#"><i>Cisco TelePresence Management Suite Extension for Microsoft Exchange Administrator Guide (2.3)</i></a>	D14847

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## Checking for updates and getting help

We recommend registering your product at <http://www.tandberg.com/services/video-conferencing-product-registration.jsp> in order to receive notifications about the latest software and security updates. New feature and maintenance releases are published regularly, and we recommend that your software is always kept up to date.

If you experience any problems when configuring or using the product, consult the documentation at <http://www.tandberg.com/support/video-conferencing-documentation.jsp> for an explanation of how its individual features and settings work. You can also check the support site at <http://www.tandberg.com/support/> to make sure you are running the latest software version.

You or your reseller can also get help from our support team by raising a case at <http://www.tandberg.com/support/>. Make sure you have the following information ready:

- The software build number which can be found in the product user interface (if applicable).
- Your contact email address or telephone number.
- The serial number of the hardware unit (if applicable).

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