



# Cisco TelePresence Management Suite Extension for Microsoft Exchange

User Guide

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## Getting started

Cisco TelePresence Management Suite Extension for Microsoft Exchange (Cisco TMSXE) integrates with your organization's videoconference management system (Cisco TMS) to let you book videoconferences using Outlook. The extension also replicates bookings from Cisco TMS to Exchange, ensuring that the resource calendars you see in Outlook are always in sync with the videoconference backend.

This guide is intended for organizers who book videoconferences using Outlook.

## Supported clients

Cisco TMSXE can be used with any of the following clients:

- Outlook 2007 Service Pack 2
- Outlook 2010
- Outlook Web Access
- Outlook Web App

## Booking videoconference resources

Setting up a basic videoconference using your organization's default settings works the same as booking any other meeting using Outlook. You book videoconference resources by adding them to the **Resources** field of the meeting request.

Note that you only book the endpoints that will participate in the videoconference; conference routing and other infrastructure needs are handled automatically by Cisco TMS. Usually, the videoconference resource will be an endpoint named after the meeting room it is located in, or a personal endpoint named after the person using it.

See [Creating a new meeting \[p.4\]](#) for more detailed instructions on sending a meeting invitation.

## Using advanced settings

If made available to you by your administrator, the Cisco form shows up as a separate tab in all meeting requests in Outlook. The form contains advanced settings that let you, for example, set a password for your conference, add participants from outside your organization, and specify whether the conference should be launched automatically at the scheduled time.

Note that if you are using one of the web clients (Outlook Web Access or Outlook Web App), these advanced settings are not available.

See [Booking with advanced settings \[p.6\]](#) for detailed instructions.

## Receiving notifications

Cisco TMSXE will send you confirmation of successful bookings, and notify you if one or more of the specified resources could not be booked. Usually, rescheduling the meeting will resolve booking conflicts.

If Cisco TMS is unable to book routing resources for your meeting, you will receive notification of this. Contact your videoconference administrator for assistance with failed conference routing.

## Creating a new meeting

1. Create a new meeting invitation from your calendar or a room calendar by doing one of the following:
  - Click the **New > Meeting Request** button in your toolbar.
  - Go to **File > New > Meeting Request** in the menu.
  - Double-click on a time-slot in your calendar.
2. Add a subject for your conference.
3. Set the **Start** and **End** time for your meeting and use the **Recurrence** button to specify a recurrence pattern, if relevant.
4. Click the **To:** button to invite attendees.
5. Add the people you wish to invite to the **Required** or **Optional** fields.
6. To book rooms or videoconference endpoints, add them to the **Resources** field. Add as many rooms/endpoints as needed. Do not try to book routing resources (MCUs or gateways), these will be handled automatically by Cisco TMS.
7. Click **OK** to save the rooms and participants and return to the meeting request.
8. Click on the **Scheduling** tab to view the free/busy information for all of the meeting's invitees. Ensure that everyone is free during the requested time period, or adjust the meeting's start and end times as necessary.
9. When finished, click **Send** to save the meeting and send out the invitations.
10. The booking will now be processed by the requested resources.
  - If your booking is rejected by one or more resources:
    - Shortly after saving the meeting, you will receive one or more meeting rejection 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:
    - Shortly after saving the meeting, meeting acceptance 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 Cisco TMS administrator, unless you are [Booking with advanced settings \[p.6\]](#).

See [Modifying and deleting meetings \[p.9\]](#) for additional guidance on sending updates.

Note that if you book a meeting with a length of three minutes or less, it will not be processed by Cisco TMSXE.

## 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. Not all endpoints are able to be the videoconference master, as this feature relies on functionality not available for all types of endpoints.

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 both when the conference is first booked and again if the location field is modified later.

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**Note:** If the videoconference master is selected or modified using Cisco TMS, this will not be reflected in the Outlook meeting reservation.

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## Booking with advanced settings

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

If the administrator has made the Cisco custom form available to users, it 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 Outlook 'Appointment' form with the 'Cisco' tab selected. The form is titled 'Untitled - Appointment' and has a ribbon with 'Appointment', 'Insert', 'Format Text', and 'Developer' tabs. The 'Appointment' ribbon includes buttons for 'Save & Close', 'Delete', 'Forward', 'Appointment', 'Cisco', and 'Scheduling'. The 'Options' group contains 'Show As: Busy', 'Reminder: None', 'Recurrence', 'Time Zones', 'Categorize', 'Spelling', and 'Proofing'. The main area is labeled 'V.13' and contains the following settings:

- Bandwidth: Default
- Layout: Default
- Reservation Type: Default
- Secure Conference: Default
- Display Option to Extend Meeting: Default
- Web Conference: Default
- Billing Code: [Text Box]
- Password: [Text Box]
- Restrict ISDN:
- External Participants: [List Box]
- Add External >> [Button]
- E-mail Message: [Text Box]

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.

## Advanced settings

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

Setting	Description
<b>Bandwidth</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.
<b>Layout</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>Automatic Call Launch</i>: the conference is routed and launched automatically.</li> <li>■ <i>One Button to Push</i>: the conference is routed and ready to launch using One Button to Push on supported endpoints.</li> <li>■ <i>Manual Connect</i>: conference routing is set up, and the videoconference master must launch the conference.</li> <li>■ <i>No Connect</i>: routing for the conference is set up, and participants must connect themselves.</li> <li>■ <i>Reservation Only</i>: only the rooms are reserved. No routing is attempted.</li> </ul> <p>The default reservation type will usually be one that includes routing, depending on the defaults configured by your administrator. If routing resources are unavailable, Cisco TMSXE will attempt to book the meeting as <i>Reservation Only</i> instead.</p>
<b>Secure Conference</b>	The required encryption level of the conference. Setting to <i>Yes</i> requires that all participating endpoints support encryption for the conference to be booked or connected.
<b>Display Option to Extend Meeting</b>	This 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.
<b>Web Conference</b>	This setting determines 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 kb/s network.
<b>Email Message</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 &gt;&gt;</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 [p.8]</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.

The screenshot shows the 'Untitled - Appointment' window with the 'Cisco' tab selected. The 'External Participants' dialog box is open, displaying various settings and options for adding participants. The dialog is divided into 'Dial Out' and 'Dial In' sections. The 'Dial Out' section includes a 'Number' field with an example '+1 (555) 9720401' and radio buttons for 'Video ISDN', 'Video IP', 'Telephone', 'Telephone IP', '3G', and 'SIP'. The 'Dial In' section contains a text area for instructions: 'Include country and area code when adding an ISDN number. If you do not know the number, you cannot use Dial Out, and instead the participant must dial into the conference.' There are 'Add' and 'Close' buttons at the bottom of the dialog. The main appointment form in the background shows various settings like Bandwidth, Layout, Reservation Type, Secure Conference, Display Option to Extend Meeting, Web Conference, Billing Code, Password, Restrict ISDN, and E-mail Message.

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**.

# Modifying and deleting meetings

## Outlook

You can modify or delete a meeting directly from your Outlook client if you are the meeting organizer. Note that you cannot modify meetings that have already started using Outlook.

### 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 to ensure all calendars are kept in sync.

### 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 delete 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 resource calendars.

## Cisco TMS

When a user books a meeting from Outlook that includes one or more Cisco TMS resources integrated with Exchange, 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, if Cisco TMS is configured to send this notification.
- 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. Therefore, existing entries in user calendars will 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.

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