



# **Cisco Smart+Connected Meeting Spaces User Guide**

Release 2.1

May, 2013

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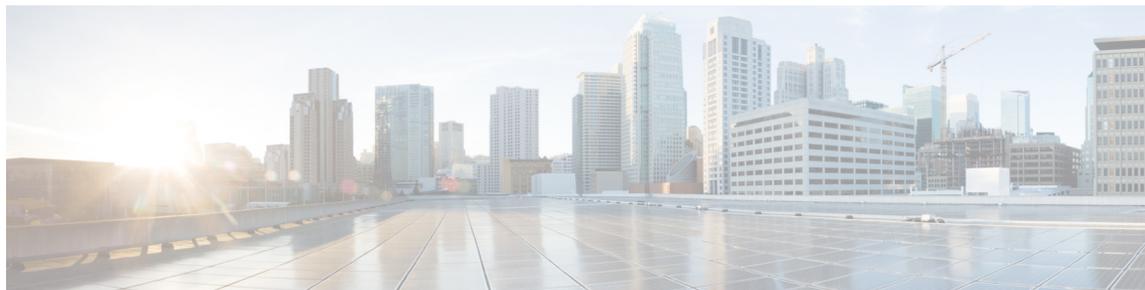
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## Preface

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This preface describes the audience, organization, and conventions of the *Cisco Smart+Connected Meeting Spaces User Guide* and provides information about the related documentation and, how to obtain documentation and submit a service request.

- [Audience, page vii](#)
- [Organization, page vii](#)
- [Conventions, page viii](#)
- [Related Documentation, page viii](#)
- [Obtaining Documentation and Submitting a Service Request, page viii](#)

## Audience

This guide is meant for users of the Cisco Smart+Connected Meeting Spaces application.

## Organization

Chapter	Description
<a href="#">Chapter 1, “Getting Started”</a>	Provides an overview of the Cisco Smart+Connected Meeting Spaces application. It also describes how to view the availability of the conference rooms and book them using the signage or IP phones placed at the actual resource space, in addition to the traditional reservation techniques such as email/calendaring client.
<a href="#">Chapter 2, “Smart+Connected MS Web Portal”</a>	Provides an overview of the Cisco Smart+Connected Meeting Spaces web portal.
<a href="#">Chapter 3, “Booking Rooms Using the Portal”</a>	Describes how to book conference rooms using the portal. It describes the procedure you must follow to book rooms using the Quick Reservation and New Reservation method.

Chapter	Description
<a href="#">Chapter 4, “Managing Meetings Using the Portal”</a>	Describes how to view, accept, decline, and delete meetings and specify your preferences for conference room booking and other settings.
<a href="#">Chapter 5, “Managing the Conference Room Resources”</a>	Describes how to send messages to the signage, control the devices in a conference room, and release the conference rooms.

## Conventions

This document uses the following conventions:

Convention	Description
<b>Boldface</b>	Commands, command options, and keywords are in <b>boldface</b> .
<i>Italics</i>	Arguments for which you supply values are in <i>italics</i> .
Option > Option	Used to describe a series of menu options.



### Note

Means *reader take note*. Notes contain helpful suggestions or references to material not covered in this guide.



### Caution

Means *reader be careful*. In this situation, you might perform an action that could result in equipment damage or loss of data.

## Related Documentation

- *Cisco Smart+Connected Meeting Spaces & Cisco Smart+Connected Digital Signage Installation Guide*
- *Cisco Smart+Connected Meeting Spaces Administrator Guide*
- *Release Notes for Cisco Smart+Connected Meeting Spaces*
- *Cisco Service Delivery Platform Administrator Guide*
- *Cisco Service Delivery Platform Installation Guide*

## Obtaining Documentation and Submitting a Service Request

For information on obtaining documentation, submitting a service request, and gathering additional information, see *What’s New in Cisco Product Documentation* at: <http://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html>.

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## Getting Started

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Cisco Smart+Connected Meeting Spaces (Smart+Connected MS) is a solution that leverages the Cisco Service Delivery Platform (SDP). This solution enables viewing of the conference room details on IP phones, signage, and Smart+Connected MS web portal and also allows booking of meetings rooms using these devices.

- [About the Smart+Connected Meeting Spaces, page 1-1](#)
- [Smart+Connected Meeting Spaces Feature Matrix, page 1-2](#)
- [Viewing the Conference Room Availability, page 1-3](#)
- [Features Available in Signage, page 1-8](#)
- [Booking the Conference Rooms, page 1-9](#)

## About the Smart+Connected Meeting Spaces

The Smart+Connected MS is a solution that leverages the Service Delivery Platform (SDP). It provides features for conference room management and signage-based messaging using IP phones. The Smart+Connected MS leads to enhanced user experience, enhanced enterprise communication, and enhanced meeting room resource utilization as the updated meeting room information is widely available and easily accessible to the employees and the administrator. It leads to better resource management and energy savings that translate to reduced energy bills and more environment-friendly corporate practices.

The Smart+Connected MS solution allows you to do the following:

- Using Digital Signage/IEC
  - Book conference rooms and TelePresence rooms.
  - View detailed floor plans with the locations of the conference rooms.
  - View the conference room schedule in different views—Building level, Floor level, and Conference Room level.
  - View the news content associated with the location.
- Using IP Phones
  - Quickly book the conference room and TelePresence room wherever the IP phone is located based on the room availability.
  - Control the meeting room devices and equipment.
  - Save energy by manually releasing a room for the duration it is unoccupied, in addition to the energy savings made when the solution automatically switches off devices.

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- Configure multiple devices to suit your meeting and presentation needs using a single menu selection.
- Create a case to resolve a fault in a conference room, and convey the same to the others in the organization by sending messages to the IP phone in the room. Creating a case also notifies the administrator of the building who tries to resolve the fault.
- Using the Smart+Connected MS web portal
  - Search for the available conference rooms and TelePresence rooms based on your requirements such as room setup, room size, location, and so on and book them. Rooms that closely meet your search criteria are displayed if no exact match is found.
  - View the current and upcoming meetings that you are part of or have organized.
  - Accept, decline, or tentatively accept meeting invites.
  - View all the scheduled meetings as a day, week, or month based calendar view.
  - Book conference rooms easily by holding down the mouse key and dragging across the required time slot in the calendar view.
  - Book conference rooms instantly using the Quick Booking option. Reservation is made simpler as you can key in the number of participants. Booking duration options range from 30 (the default duration) to 60 minutes. Location is by default the one specified in your Preferences.
  - Use the detailed booking option where you can request for change in the room setup, book equipment, add meeting agenda and notes, and so on.
  - Edit the details of the meetings you have organized.
  - Save drafts of the bookings and edit them later.
  - Save your preferred settings such as favorite rooms, location, and time zone.

In addition, the solution can help in energy savings by automatically switching devices to a standby mode when the meeting room is unoccupied and based on the configuration, turn them back on before the actual occupancy.

The overall configuration, maintenance, and content creation for the Smart+Connected MS solution is managed by the administrator through a web application. As an end user, the Smart+Connected MS helps you to effectively utilize and manage office resources using the digital signage/IEC, IP phones, and the web application. You can view the availability of the conference rooms/TelePresence rooms and book them using digital signage/IEC, search for and book available meeting spaces using the Smart+Connected MS web application, control the conference room resources and customize the settings using IP phones, save energy by releasing the conference room ahead of the booking schedule, send messages to the digital signage/IEC from the conference room/TelePresence room, and so on.

For more information, see: [Chapter 5, “Managing the Conference Room Resources”](#)

## **Smart+Connected Meeting Spaces Feature Matrix**

You can view/access the various features of the Smart+Connected MS application using touchscreen and non-touchscreen IP phones and signage and the web portal. Some additional features are available when using touchscreen signage and touchscreen IP phones. For more information, see the [“Features Available in Signage” section on page 1-8](#) and the [“Features Available in IP Phones” section on page 5-3](#) in [Chapter 5, “Managing the Conference Room Resources”](#).

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## Viewing the Conference Room Availability

To book a conference room, you first need to check the availability of the rooms. You can do this by viewing the display on the Smart+Connected solution enabled signage. The three types of views on the signage are as follows:

- **Building View**—Displays the schedule for all the conference rooms in the building categorized at the floor level.
- **Floor Level View**—Displays the plan for the current floor with the location of the conference rooms, the availability status, and the schedule. For touchscreen signage, you can book a room on the current floor or navigate to other floors and book any room located there.
- **Conference Room View**—Displays the schedule of the primary conference room and the other rooms associated to the signage. For touchscreen signage, you can use the signage to check the available meeting slots and book the room for those slots.

The view is displayed for a specific preset duration of time, after which the other content added to the signage, if any, appears in a sequence.

- [Building View, page 1-3](#)
- [Floor Level View, page 1-4](#)
- [Conference Room View, page 1-7](#)

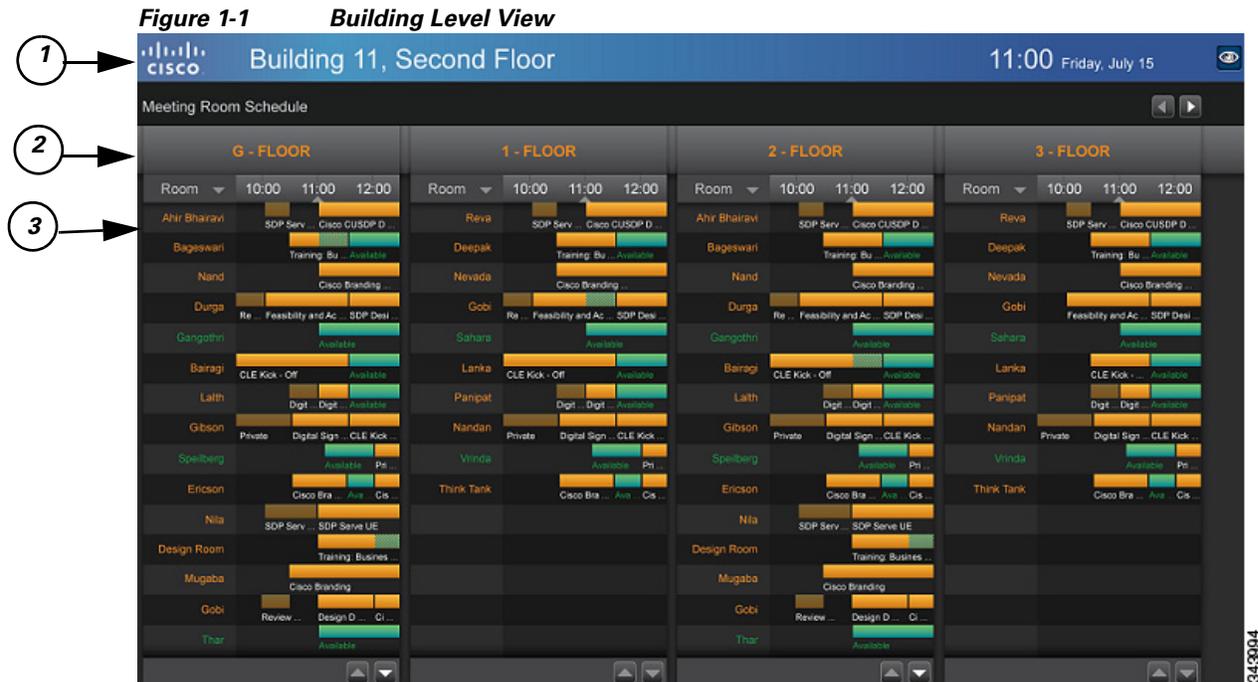
### Building View

The building view displays the following information:

- **Location, Time, and Date**—These details are shown as the header on the signage screen. The location includes the building and floor name. The time and date are also displayed.
- **Floors**—The floors in the building are displayed as columns with the conference rooms on each floor listed as rows below the floor name. If there are several floors in the building, the screen displays a certain number of floors, and then the view changes to the next few floors. For touchscreen signage, you can also use the left and right arrow buttons to navigate to the required floor.
- **Meeting Room Schedule**—The schedule is available for three hours for all the conference rooms on each of the floors. The rooms are listed in alphabetical order. The available rooms and time slots are shown in green and the unavailable rooms and time slots are shown in orange. If the number of rooms is more than what can be shown in the initial view, the remaining rooms will be shown in the next flip. For touchscreen signage, you can also use the up and down arrow buttons to navigate to the required conference room.

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Figure 1-1 shows the building view displayed on the signage.



## Understanding the Building View

Table 1-1 lists the main areas of the building view.

**Table 1-1 Building View**

Number	View Area	Description
1	Location, Time, and Date	The name of the building and the floor where the signage is placed along with the current time and date.
2	Floors	The floors in the building are displayed as separate columns that contain rows listing the various conference rooms.
3	Meeting Room Schedule	The availability/non-availability of conference rooms is shown for hourly time slots.

## Floor Level View

The floor level view displays the following information:

- **Location, Time, Date, and Logo**—These details are shown as the header on the signage screen. The location includes the building and floor name. The time, date, and the Meeting Spaces logo are also displayed.
- **Floor Plan**—It is a map of the floor and appears towards the top-left corner, and occupies more than 75% of the signage display area. The conference room/TelePresence room names appear as per the location on the floor map, and are indicated with a red dot to show a reserved status and a green dot to show an available status. There is a user location indicator titled “You Are Here”.

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- **Schedule**—The meeting details for each of the conference room/TelePresence room on the floor are shown at the top-right corner of the display. The schedule can list the details of 10 conference rooms at a time. If there are more than 10 rooms on the floor, the display cycles through the rooms every few seconds. The rooms are listed in the alphabetical order, and the room details are available for three hours. The icons for the available rooms are shown in green, the icons for the unavailable rooms are shown in maroon, and the icons for the rooms that will be available soon are shown in yellow. There are scrolling bars for the different booking slots for each room. These bars too appear in green, maroon, and yellow indicating the meeting room status. Rose color bars appear for the past time slots for which meetings have got over. For touchscreen signage, you can select any of the available conference rooms, and make a booking for the required time slot by tapping it.



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**Note** You can book any room plotted in the floor plan, if it is available, by tapping it. The Booking Details pop-up dialog opens.

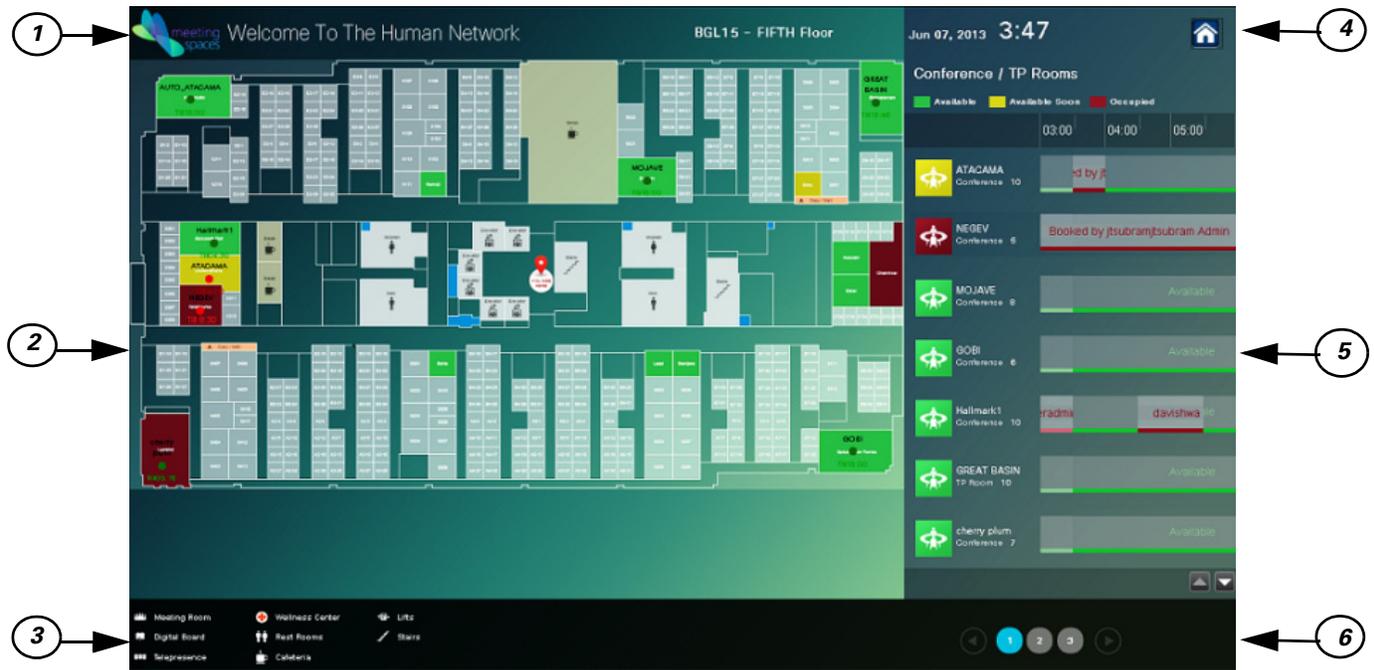
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- **Legend**—The legend is located at the bottom-left corner of the display. It displays the icons that are used in the floor plan. For example, Meeting Room.
- **Floor Navigation**—The floor navigation buttons appear towards the right side of the footer section. There are numbered buttons for each floor in the building and only three buttons are displayed at a time. The left and right arrow buttons allow you to scroll to the numbered buttons for the other floors. The button for the floor for which the plan is currently displayed is highlighted. For touchscreen signage, you can tap any of the buttons and navigate to all the floors in the building where the signage is located.
- **News Content**—At the bottom of the signage screen, there is a section for the news content that is associated to the location. The title of the news items is displayed.
- **Home Icon**—For touchscreen signage, you can click the home icon and select any of the other content you want to view.

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Figure 1-2 shows the floor view displayed on the signage.

**Figure 1-2 Floor Level View**



## Understanding the Floor View

Table 1-2 lists the main areas of the floor view.

**Table 1-2 Floor View**

Number	View Area	Description
1	Location, Time, Date, and Logo	The name of the building and the floor where the signage is placed along with the current time and date. The Meeting Spaces logo is also shown.
2	Floor Plan	The floor layout with the schedule data of the conference rooms superimposed. The green dots indicate that the room is available and red dots indicate that the room is currently booked.
3	Legend	The interpretation of the symbols used on the floor plan.
4	Home Icon	The icon used to change the view, if any other content is added for the signage device.
5	Meeting Room Schedule	The availability/non-availability of conference rooms on the floor is shown for hourly time slots.
6	Floor Navigation	The arrow and numbered buttons that you can use to view the plans for the other floors in the building.

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## Conference Room View

The conference room view displays the following information:

- **Date & Time**—These details are shown as a header on the signage screen.
- **Occupancy Status & Temperature**—The status and temperature of the conference room is displayed in the top right corner of the view. The word “Occupied” appears next to the name of the conference room along with time slot of the booking, if the room is occupied. The subject of the meeting, room temperature, and information about whether the air conditioner is on/off is also displayed.
- **Primary Room Schedule(s)**—The detailed schedules of the one or two primary conference rooms with which the signage is associated are displayed as separate columns for each room. The schedule is displayed as a rolling 9-hour window, which is constantly updated to show the latest room schedule. The room name is displayed as the column header followed by rows depicting availability the room. The available and unavailable time slots are displayed in different colors. For booked slots, the subject of the meeting is also displayed. For touchscreen signage, you can book any of the primary room(s).

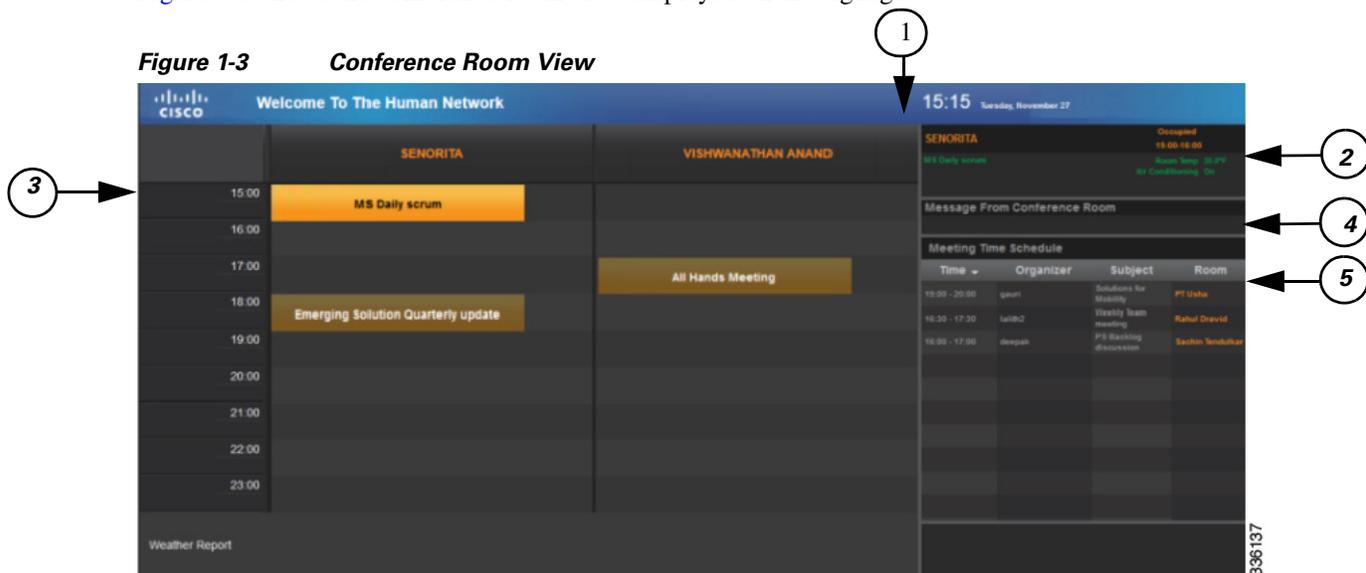


### Note

If a conference room has been booked using the mail client, the subject of the meeting and the attendee list is displayed on the signage. These details are not displayed if the administrator enables the ‘Hide Subject’ and ‘Hide Attendees’ options for the conference room. When the ‘Hide Subject’ option is enabled, the subject of the meeting is displayed in the format “Booked by <name of the meeting organizer>”.

- **Conference Room Message**—All the messages that are sent to the signage using the IP phones in the conference rooms with which the signage is associated (primary conference rooms) are shown at the right hand side of the view. News content appears at the bottom of the display.
- **Meeting Time Schedule**—The schedule of other rooms in the zone where the signage is located is shown at the right side of the display. The names of the rooms are displayed in a chronological order of meetings. The available and unavailable rooms and slots are displayed in different colors. The meeting subject is also shown for each booked slot. For touchscreen signage, you can click the up and down arrow buttons to navigate to the desired conference room in case there are several rooms.

Figure 1-3 shows the conference room view displayed on the signage.



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## Understanding the Conference Room View

Table 1-3 lists the main areas of the conference room view.

**Table 1-3** Conference Room View

Number	View Area	Description
1	Date & Time	The current date and time is displayed on the top right corner.
2	Occupancy Status & Temperature	The details like whether the room is occupied/unoccupied. Also displayed is the temperature of the primary conference room and whether the airconditioner is on/off.
3	Primary Room(s) Schedule	The hourly schedule of the primary room(s) associated to the signage.
4	Conference Room Message	The message send to the signage using an IP phone in a conference room.
5	Meeting Time Schedule	The details of meetings to be held in the conference rooms associated with the signage, such as time, organizer, subject, and room name.

## Features Available in Signage

Table 1-4 lists the features that are available/can be accessed using the following devices:

- Touchscreen signage
- Non-touchscreen signage

**Table 1-4** Features Available in Signage

Features	Touchscreen Signage	Non-Touchscreen Signage
Floor and Building Name	Not shown in Conference Room View	Not shown in Conference Room View
Date & Time	Y	Y
Temperature at Location	Shown only in Conference Room View	Shown only in Conference Room View
Conference Room Name	Shown only in Conference Room View	Shown only in Conference Room View
Conference Room Message	Shown only in Conference Room View	Shown only in Conference Room View
Meeting Room Schedule	Y	Y
News Content (Shown as a footer)	Not shown in Building View	Not shown in Building View
Floor View Navigation	Not available in Conference Room View	N

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**Table 1-4**      *Features Available in Signage*

Features	Touchscreen Signage	Non-Touchscreen Signage
Room List Scrolling	Y	N
Booking Rooms	Not available in Building View	N

Y=Yes, N=No

## Booking the Conference Rooms

Apart from booking the conference rooms using the traditional methods, you can use the touchscreen signage located in a building to book the available conference rooms in the building through the conference room and floor plan layout views. You can view the conference room schedule details using any of the three signage views. You can also book the conference rooms using the Smart+Connected MS user portal and the IP phones located in the conference rooms.



### Note

Some of the signage within a premise can be without the touchscreen. Although you cannot use them to book the conference rooms, you can view the room availability as the display is similar to that in the touchscreen signage.

- [Using the Signage, page 1-9](#)
- [Using the IP Phones, page 1-10](#)
- [Using the Smart+Connected MS Web Portal, page 1-11](#)

## Using the Signage

You are allowed to book a conference up to three hours in advance.

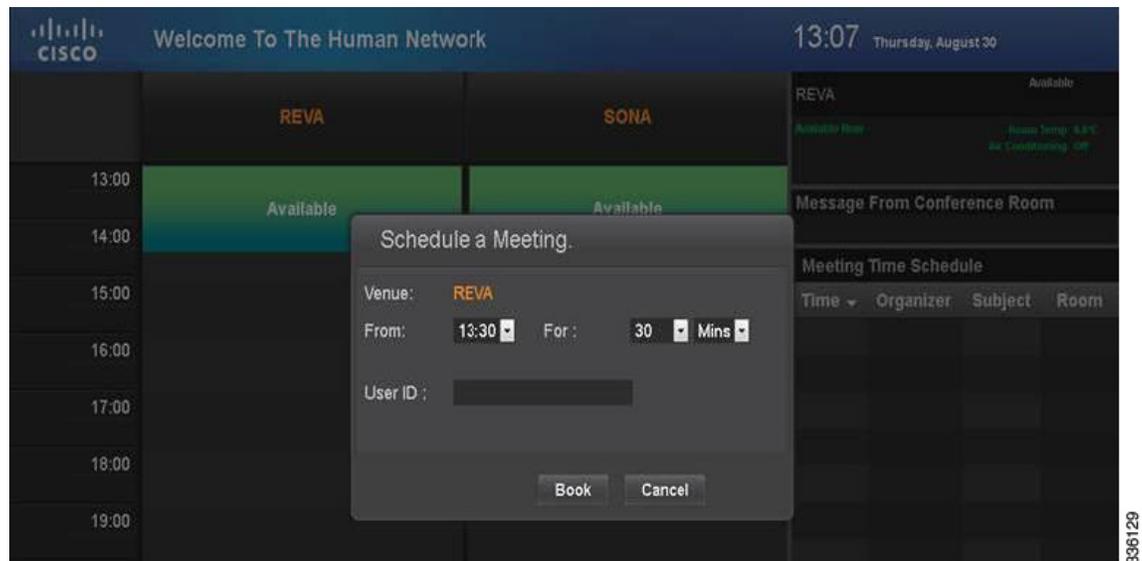
To book a conference room using the touchscreen signage, perform the following steps:

- Step 1** Tap the time slot for which you want to book the conference room from the schedule that is displayed on the signage.
- The Schedule a Meeting dialog box appears. The start time of the booking is automatically displayed in the From drop-down list depending on the slot that you have selected. You can change the time by choosing another option from the drop-down list.

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Figure 1-4 shows how to book a room using the signage.

**Figure 1-4 Booking Room Using Signage**



- Step 2** Choose the duration for which you want to book the room from the first For drop-down list. Choose the Minutes option from the second For drop-down list. The time of the next meeting is displayed below the drop-down list, so that you can avoid selecting a time slot that clashes with it.
- Step 3** Enter your User ID with the help of the virtual keyboard that is displayed on the screen, and tap **Accept**. User ID is the ID that uniquely identifies a user in the corporate directory (LDAP).
- Step 4** Tap **Book** to book the conference room or tap **Cancel** to close the dialog box.

If you tap **Book**, a dialog box appears informing you that the meeting schedule request has been received, and that you need to check your email to know the booking status.

A meeting is scheduled in Microsoft Exchange for the conference room, and an automatic acceptance mail is sent to you from the conference room stating that your meeting request has been accepted. The status of the conference room and the meeting details for the room are updated when the signage page is refreshed. The subject of the meeting will be displayed as: “Booked by <your name>”.

## Using the IP Phones

You can book a conference room using a touchscreen IP phone in the room only if the status of the room is “Available” at that time. If the room is occupied or a meeting is in progress, the option for booking the room is unavailable. After the booking is done, the schedule of the conference room is updated in the signage displays.

### Using Touchscreen IP Phones to Book a Conference Room

To book a conference room using touchscreen IP phone, perform the following steps:

- Step 1** On the IP phone, press the **Services** button.

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The list of available services appears.

**Step 2** Tap the service that has been created for the Smart+Connected MS in Cisco Unified Communications Manager (CUCM).

The Smart+Connected MS service screen appears.



**Note** For this guide, it is assumed that the name of the Smart+Connected MS service configured in CUCM is 'S+CC Service'.

**Step 3** Tap the book room  icon. Choose the duration for which you want to book the room from the drop-down list that appears.



**Note** This room booking feature will be available only if the "Room Booking" feature is added to the configuration that is associated to the location.

**Step 4** Enter your user ID to book the room. The room is reserved for the selected time slot. The following room reservation details are displayed on the IP phone:

- “Booked by <your name>”
- Time slot of the booking



**Note** The booking of conference rooms feature is not available in non-touchscreen IP phones.

## **Using the Smart+Connected MS Web Portal**

You can book conference rooms by using the Smart+Connected MS web portal. For more information, see [Chapter 3, “Booking Rooms Using the Portal”](#).



## Smart+Connected MS Web Portal

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This chapter describes the Smart+Connected MS web portal and explains the user interface and the portal tabs.

- [About the Smart+Connected MS Web Portal, page 2-1](#)
- [Understanding the User Interface, page 2-2](#)
- [Portal Tabs, page 2-3](#)

### About the Smart+Connected MS Web Portal

The Smart+Connected MS web portal allows you to search for, book, and set up the conference rooms for meetings, book resources for the meeting rooms, send out invites to the attendees, and manage your meetings. You can apply your preferred settings to customize the booking experience, save the search results to use them for future bookings, and set certain conference rooms as your favorites so that they show up whenever you search for rooms.

The portal displays the daily, weekly, and monthly meeting calendar, which is up-to-date and synchronized with your enterprise calendaring system. You can use the calendar to quickly view all the meetings that you are a part of, whether as the attendee or the organizer. You have the option of accepting, declining, or deleting the meetings from the calendar itself. The recurring meeting feature allows you to create a single reservation for multiple meetings that you have to repeatedly organize over a period of time. This saves you the inconvenience of creating separate reservations on a daily, weekly, or monthly basis. You can add the WebEx meeting option which allows the attendees to log in remotely over web if they cannot be physically present in the meeting room.

### Logging In

You can log in to the Smart+Connected MS web portal using any of the browsers certified for the application. The portal can be accessed using `http://host-name:domain-port/calendar`. You can log in using your enterprise login credentials.

To log in to the Smart+Connected MS web portal, perform the following steps:

- 
- Step 1** Enter the URL in the address field of the web browser, and click **Enter**.  
The Smart+Connected MS login page appears.
  - Step 2** Enter the username and password.

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**Step 3** Click **Login**.

The Smart+Connected MS home page appears.

After logging in, if you do not use the portal for a while, your browsing session will time out. In such a situation, you must re-log in to the portal.

## Logging Out

To log out of the portal, click the Logout option displayed in the top right corner of the page, next to your username.

## Understanding the User Interface

Figure 2-1 shows the home page of the Smart+Connected MS web portal.

**Figure 2-1** Smart+Connected MS Home Page

The screenshot displays the Cisco Smart+Connected Meeting Spaces home page. The top navigation bar includes 'My Booking' and 'Preferences' tabs, and the user is logged in as 'Super Administrator (superadmin)'. The main content area shows a calendar view for 'Today' (6 Jun 2013) with various meeting slots. A legend at the bottom identifies meeting types: Upcoming meetings (blue), My meetings (teal), Current meetings (green), and Tentative meetings (yellow). On the right, there is a 'Saved Drafts' section with four meeting entries. The top navigation bar also includes 'Quick Reservation' and 'New Reservation' buttons. Callout numbers 1 through 7 point to specific UI elements: 1 (My Booking), 2 (Day View), 3 (Calendar grid), 4 (Legend), 5 (Logout), 6 (Quick Reservation), and 7 (Saved Drafts).

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Table 2-1 list the main areas of the home page.

**Table 2-1 Home Page**

Number	View Area	Description
1	Portal Tabs	Displays the two main tabs of the web portal that allow you to create
2	Calendar Tabs	Displays the tabs that you can click to change the calendar view.
3	Meeting Calendar	Displays all your meeting for the day, week, or month. Click any meeting in the calendar to edit, delete, accept, or decline it.
4	Meeting Legend	Displays the meaning of the different background colors for the meetings displayed in the calendar.
5	Username/Logout Option	Displays the username through which you have logged in to the portal and the option that you can click to log out of the portal.
6	Reservation Buttons	Displays the buttons you can click to create a quick or detailed reservation.
7	Draft List	Displays the reservation drafts that you have saved. Edit or delete any draft by clicking the required icon.

## Portal Tabs

The Smart+Connected MS web portal has two main tabs:

- [My Booking, page 2-3](#)
- [Preferences, page 2-5](#)

## My Booking

The My Booking tab allows you to book meetings rooms, and view, search for, edit, and accept/decline meetings.

You can change the calendar view of your meetings as per your preference using the three sub-tabs: Day View, Week View, and Month View. The meeting legend is displayed below the calendar and lists the meeting status that each of the colors in the calendar signify. You can click any meeting invite in the calendar and accept, tentatively accept, decline, or delete it depending on the existing status of the meeting. For the meetings that you have organized, you can click on the meeting instance in the calendar and choose the Detailed Edit or Delete option. For the recurring meetings you organize, you have the option of editing and deleting the entire series of meetings or any single occurrence. The  icon displayed in the bottom right corner of a meeting instance indicates that it is a recurring meeting.



### Note

The background color of the recurrence icon depends of the status of the meeting instance. For more information, see the “Meeting Legend” section on page 2-5.

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The Quick Reservation and New Reservation buttons allow you to book meeting rooms instantly or opt for a detailed booking process where you can avail yourself of the various features that enhance the entire meeting experience.

- [Day View, page 2-4](#)
- [Week View, page 2-4](#)
- [Month View, page 2-4](#)
- [Meeting Legend, page 2-5](#)
- [Quick Reservation, page 2-5](#)
- [New Reservation, page 2-5](#)
- [Saved Drafts, page 2-5](#)

### **Day View**

The meeting calendar appears with the Day View tab selected by default. The current date is displayed on the top along with the left and right navigation buttons. Click these buttons to view the meetings scheduled for the other dates. Click the Today link to go back to the current date view.

The 24 hour slots in the day are displayed as a row each. Only a certain number of hours are seen at a time. Use the vertical scroll bar to move the view up and down and see the remaining time slots and meetings. The meetings, if any, for the time slots appear with various background colors depending on the meeting status. The subject and duration of each meeting is displayed. For more information, see the [“Meeting Legend” section on page 2-5](#).

**Note**

When the meeting calendar is in the day or week view, you can click and hold down the mouse key and drag across the time slots to book a meeting for the selected time period. Click Yes in the New Reservation dialog box that appears asking you to confirm if you want to initiate a booking. This opens the booking wizard.

### **Week View**

Click the Week View tab to view the meeting schedule for entire week. The days of the week appear as separate columns with the current date column selected. The 24 hour slots for each day appear as rows and the meetings, if any, are displayed for these slots. Use the left and right navigation buttons to view the calendar for other weeks. Clicking the Today link takes you back to the current week. Only a certain number of hours are seen at a time. Use the vertical scroll bar to move the view up and down and see the remaining time slots and meetings.

### **Month View**

The Month View has columns for the seven weekdays and lists all dates in the current month similar to a traditional calendar. The current date is highlighted. Use the left and right navigation buttons to view the calendar for the other months. Clicking the Today link takes you back to the current month. Click any meeting to accept, tentatively accept, decline, or delete it. Click any date to initiate a new booking for that day.

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## Meeting Legend

The meeting legend can be found below the calendar view. It conveys the meaning of the different colors used for the meetings shown in the calendar.

-  Meetings to which you have been invited but have not yet begun.
-  Meetings that you have organized and can edit/cancel.
-  Meetings currently going on which you are a part of.
-  Meetings that you are not sure about attending and have tentatively accepted.



### Note

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Past meetings appear with a brown background.

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## Quick Reservation

The Quick Reservation button is displayed in the top right corner. You can use this option to quickly book a conference room using a single screen interface. The process is simple and fast. It can come in handy when you want to book a room on a short notice and are hard pressed for time or when you simply want to book a meeting space without inviting any participants for the meeting. For more information, see the [“About Quick Reservation” section on page 3-1 in Chapter 3, “Booking Rooms Using the Portal”](#).

## New Reservation

The New Reservation option allows you book conference rooms, send invites to attendees, request change in room setup, book equipment for the room, and provides several other features such as adding WebEx, and so on. For more information, see the [“About New Reservation” section on page 3-2 in Chapter 3, “Booking Rooms Using the Portal”](#).

## Saved Drafts

This pane lists the reservation drafts that you have saved as separate rows. Details such as the meeting date, meeting subject, duration, and venue, are shown. The edit icon  allows you to edit the draft. To discard the draft, click the delete icon .

Only a certain number of drafts appear at a time and the remaining are listed on subsequent pages. Click the page number and the arrow buttons displayed below the drafts list to view the other drafts.

## Preferences

The second main tab in the Smart+Connected MS web portal, the Preferences tab, allows you to specify your meeting preferences such as the time zone, your location, and favorite rooms. The application saves these details and customizes the settings to suit your requirements. For more information, see the [“Configuring Meeting Preferences” section on page 4-4 in Chapter 4, “Managing Meetings Using the Portal”](#).



## Booking Rooms Using the Portal

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This chapter describes the two methods you can use to book the conference rooms using the Smart+Connected MS user portal.

- [About Quick Reservation, page 3-1](#)
- [About New Reservation, page 3-2](#)
- [Creating a New Reservation, page 3-2](#)
- [New Reservation Use Case, page 3-8](#)

### About Quick Reservation

Quick Reservation is a method that assists you in quickly booking the conference rooms for impromptu meetings. It can come handy when you simply want to book a meeting space without using any extra features.

### Create a Quick Reservation

To create a quick reservation, perform the following steps:

- 
- Step 1** Log in to the Smart+Connected MS portal.  
The home page appears with the My Booking tab selected by default.
  - Step 2** Click **Quick Reservation** in the top right corner of the page.  
The Quick Booking page appears. The current date is displayed on the top.
  - Step 3** From the Meeting Type drop-down list, choose an option depending on the purpose of the meeting. If you choose TelePresence, the application will find rooms that have the TelePresence feature and display them in the search results.
  - Step 4** From the Duration drop-down list, choose the meeting duration. The available options are divided into 15 minute slots with 1 hour being the maximum duration you can specify.
  - Step 5** From the Location drop-down lists, choose the country, state, city, campus, and building where you want to book the room. (Optional) To further narrow the search, you can also choose the floor where you want to book the room. By default, the current location that you specify on the Preferences tab is displayed.
  - Step 6** In the No. of Participants field, enter the number of meeting attendees.
  - Step 7** Click **Search**.

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The conference rooms that meet your criteria or closely match it are listed in the Resources pane with the following details:

- The room(s) you add as your favorite on the Preferences tab appears on the top of the list. A star icon is displayed next to the conference room name.
- A green icon is displayed before the name of rooms that meet your search criteria completely.
- An orange icon is displayed before the name of rooms that match closely with your search criteria but are not available for selection for the specified time.
- Miniature icons depicting the facilities available in the each room are also shown. For example, projector, signage and so on.
- Seating capacity of each room is displayed next to the room name.

Only a certain number of results are displayed per view. Use the left and right navigation buttons to view the other available rooms.

The pane on the right shows the availability of each meeting room for the all of the 24 hour slots in the day represented as a column each. The slots which are busy appear in blue. If the room is booked partially during any one-hour slot, the blue color appears only for that fraction of the slot indicating that the room is partially busy. The duration that you specify for your booking is highlighted for all rooms by a grey vertical bar. Only a certain number of slots are seen in the view and you can use the horizontal scroll bar to view the other time slots.

**Step 8** Click the radio button for the room(s) that you want to book. The button turns blue indicating that the room is selected.

**Step 9** Click **Book**.

You are taken to the home page where the new booking appears in the calendar view. A message appears at the top of the page informing you that the meeting reservation is completed successfully.

## About New Reservation

The New Reservation feature in the Smart+Connected MS user portal helps you to not only search for and book available conference rooms but offers other features that enhance the overall meeting experience. It allows you to filter the room search results, book equipment and other supplies that you require during the meeting, request for arranging the room layout as desired, invite members of your organization and external participants for the meeting, save your searches and the booking drafts, and review your booking summary before confirming a booking.

## Creating a New Reservation

The New Reservation process is a detailed procedure that involves the following screens:

- [Reservation Details, page 3-3](#)
- [Rooms and Participants, page 3-5](#)
- [Services, page 3-7](#)
- [Summary, page 3-7](#)

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## Reservation Details

Reservation Details is the first screen of the New Reservation wizard. To make a new booking and to specify the booking details, perform the following steps:

**Step 1** Log in to the Smart+Connected MS portal.

The home page appears with the My Booking selected by default.

**Step 2** Click **New Reservation** in the top right corner of the page.

The Reservation Details screen appears.

**Step 3** Enter the subject of the meeting in the Subject field.

This is the subject of the meeting invite sent to the participants over email. It is also displayed whenever the meeting appear in the calendar and as the subject of the saved draft.



**Note** All the fields marked with the star symbol are mandatory. If you proceed to the next page without providing all the required inputs, you will get an error message. The fields where you are required to provide the inputs are highlighted in red.

**Step 4** From the Meeting Type drop-down list, choose the required option.

**Step 5** Enter the agenda of the meeting in the Meeting Agenda field.

The text you enter here will be sent as the message body of the meeting invite email.

**Step 6** By default, the Date field is populated with the current date. To change the date, click inside the Date field. Choose a meeting date from the calendar that appears.

**Step 7** By default, the next half-hour slot is taken as the meeting duration. To change the duration, click inside the Starts at and Ends at fields.

The hour and minute selection dialog box appears for both these fields.

- a. Choose an hour slot from the AM or PM list in the Hour column.
- b. Choose any of the 5-minute intervals in the Minute column.
- c. Click **Done**.

When you choose a meeting start time that exceeds the end time, the end time field gets automatically updated to show a time that is an hour more than the start time.

**Step 8** Choose any or all of the following options by clicking the radio button for them:

- All day event (9 am to 5 pm)—For meetings that extend for the entire working day.
- Add WebEx Meeting—For hosting a meeting via WebEx.



**Note** Enter the password, which the attendees will use to log in to the WebEx meeting, in the WebEx password field if you choose this option.

- Recurrence—For repeating the booking on a daily, weekly, or monthly basis. Recurring booking is useful when you need to organize a meeting with the same agenda, room setup, and attendees repeatedly. For example, daily status meetings or weekly team meetings.

Perform the following steps to make a recurring booking:

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- a. From the Repeats drop-down list, choose **Daily**, **Weekly**, or **Monthly** based on the frequency of the meeting event.
  - b. If you opt for the Daily recurrence, choose any option ranging from 1 to 10 from the Repeats every drop-down list. Proceed to Step e.
  - c. (Alternatively) If you opt for the Weekly recurrence, choose any option ranging from 1 to 10 from the Repeats every drop-down list. For example, if you want the meeting to recur every alternate week, choose 2. You can also choose particular days of the week, all of the seven days, or only weekdays for the meeting to recur by clicking the radio button for any of these options. Proceed to Step e.
  - d. (Alternatively) If you opt for the Monthly recurrence, you can choose to repeat the meeting at any interval ranging from 1 to 12 months. To repeat the monthly booking on the selected date of the month, click the **day of the month** radio button and enter the date in the field that appears. To repeat the booking on a certain weekday of a particular week, click the **day of the week** radio button. From the first drop-down list, choose the week number and from the second drop-down list, choose the weekday.
  - e. Click inside the Starts On field. Select a date from the calendar that appears. This will be the start date of the meeting.
  - f. For specifying the end of the recurrence, enter the number of times you want to repeat the meeting in the Ends After occurrence field. Alternatively, click the End By radio button and click inside the field. Click a date for ending the recurrence in the calendar that appears.
  - g. Click **Done**.
- Confidential—For hiding the subject of the meeting and the meeting organizer's name on the signage/IP phones whenever the schedule for the meeting room is displayed. These meeting will be displayed with subject "Booked".

To deselect the All day event, Add WebEx meeting, and Mark as Confidential options, click the selected radio button again. It will turn grey indicating that the option is deselected. To deselect the Recurrence option, click the radio button again and click Remove in the dialog that pops up.

**Step 9** Click the edit  icon for the Primary Location field. Choose the country, state, city, campus, building, and floor from the location drop-down list for each of these options. By default, the current location that you specify on the Preferences tab is displayed.

**Step 10** Enter the required seating capacity in the Room Size field.

**Step 11** (Optional) Click the edit  icon for the Secondary Location field. From the location drop-down list for each of these options, choose the country, state, city, campus, building, and floor. Click the  icon to add multiple secondary locations.

The Secondary Location details can be entered when attendees are expected to attend the meeting from different location/meeting rooms.

**Step 12** Click a room layout style image in the Room Setup area to have the room arranged as desired.

The setup and de-setup time and the minimum notice period is displayed for the chosen setup.



**Note** Rooms which can be arranged in the type of setup that you request will be displayed in the search results. Ensure that the duration before the meeting starts is equal to or more than the minimum notice period. For example, if the current time is 11 am and the auditorium type of setup requires 2 hours, you should choose the meeting start time as 1 pm or any slot after that.

**Step 13** Click **Save and Proceed** to go to the Room and Attendees screen.

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- Step 14** (Optional) Click **Save Draft** if you do not wish to book a conference room currently and want to use the information you have specified at a later time. The draft can be retrieved from the Saved Drafts list that appears in the Reservation Details screen the next time you make a new booking.
- Step 15** (Optional) Click **Cancel** if you want to cancel the booking process.  
Click **Yes** in the Confirm Cancel dialog that opens. You are re-directed to the home page.
- 

## Rooms and Participants

Rooms and Participants is the second screen of the New Reservation wizard. It displays the list of available rooms that meet the criteria that you specified in the Reservation Details page. This screen also lets you add the participants for the meeting.

To add rooms and participants, perform the following steps:

- Step 1** The Resources pane on the left side of the Rooms and Attendees screen displays the search results for the location you specified.

The following details are displayed for the conference rooms:

- The room(s) you add as your favorite on the Preferences tab appears on the top of the list. A star icon is displayed next to the conference room name.
- A green icon is displayed before the name of rooms that meet your search criteria completely.
- An orange icon is displayed before the name of rooms that match closely with your search criteria but are not available for selection for the specified time.
- Miniature icons depicting the facilities available in the each room are also shown. For example, projector, signage and so on.
- The seating capacity of each room is displayed next to the room name.

Only a certain number of rooms are listed per view. To see the other rooms (if any) or to go back to the initial list of rooms, click the left and right navigation buttons.

The pane on the right shows the availability of each meeting room for the all of the 24 hour slots in the day represented as a column each. The slots which are busy slots appear in blue. If the room is booked partially during any one-hour slot, the blue color appears only for that fraction of the slot indicating that the room is partially busy. The duration that you specify for your booking is highlighted for all rooms by a grey vertical bar. Only a certain number of slots are seen in the view and you can use the horizontal scroll bar to view the other time slots.

- Step 2** (Optional) Click the left and right navigation buttons beside the meeting date displayed above the Resources pane to view the meeting rooms available on the other dates. Once you know which rooms are available for the other times and dates, you can change the meeting date or time by clicking the edit  icons next to the date and time displayed in the top of the page. For recurring meetings, you can edit only the time from this page. The edit date icon is unavailable for recurring meetings and what you see is the  icon indicating that it is a recurring meeting. After you change the date or time, click the Update Results link to get the search list updated based on the changed date and time.

For a more detailed edit and to change the date of a recurring meeting, click the Modify Search link provided at the top right side of the Rooms and Attendees page. This takes you back to the Booking Details page, which is populated with all the settings that you configured previously.

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**Step 3** Click the radio button for any available room(s) to choose it. It will turn blue indicating that the room is selected. To deselect any of the selected rooms, click the selected radio button again. It will turn grey indicating that the room is deselected.

If you choose a room which is smaller than the room size that you specified in the Booking Details page, and click the Skip to Summary or the Save and Proceed button you get a message informing you of this that asks you if you want to choose another room.




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**Note** Choosing a room is not mandatory for booking a meeting. But if you want to proceed to the Services screen, choosing at least one room is mandatory.

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**Step 4** Click the  button to add the participants for the meeting.

The Select Participants dialog box appears.

**Step 5** Enter the names of the attendees in the Required Participants field and Optional Participants field. You can choose any option from the list of names that appears when you type the first four alphabets of a user's name. It displays the names of all the users in the database whose name starts with the alphabet characters that you entered. The names of the various users that you select are separated by semi-colons.

**Step 6** Enter the email addresses of the people who are not a part of the company database, but that you want to invite for the meeting in the Visitors field.

**Step 7** Click **Done** to close the Select Participants dialog box and return to the Room and Participants screen.

The names of the participants that you have chosen appear in the Resources pane along with their usernames. Your name is included by default in the Participants list as you are the organizer of the meeting. A green icon appears before their names if the users are available during the time that you have selected for the meeting. The red icon before an invitee's name indicates that the person is busy during the time of the meeting.

**Step 8** The right pane displays the availability/non-availability of each of the attendees, similar to the room availability pane mentioned in [Step 1](#).

**Step 9** Click the cancel  icon against any name to remove the person from the Participants list.

**Step 10** (Optional) To filter your room search, do the following:

- a. Click the  icon in the Resources pane.
- b. Enter the location for which you want to search the conference rooms in the Location Name field.
- c. Click the icon(s) for the features you want in the conference rooms. The icons that you select appear dimmed.
- d. Click **Filter**.

The search result shows the rooms that meet the additional requirements.

**Step 11** Once you have entered all the details that you want in the Rooms and Participants screen, you can click any of the following buttons:

- **Skip to Summary**—The new booking process ends and you are taken to the Summary screen where you can confirm the reservation.
- **Save and Proceed**—This saves all the settings and takes you to the Services screen where you can book resources for the conference room.
- **Save Draft**—The settings chosen in this screen and the previous screen are saved and appear in the Saved Drafts list in the Reservation Details screen and in the home page. Drafts are saved with the same name as the meeting subject. You can select any draft from the drafts list and proceed further/edit it any time that you want.

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- **Back**—This takes you back to the Reservation Details screen where you can edit and modify the initial parameters based on which the Smart+Connected MS application searches for the conference rooms.
  - **Cancel**—This cancels the booking process and re-directs you to the home page.
- 

## Services

This is the third screen of the New Reservation wizard. It is not a mandatory step in the booking process unless you want to book some additional things required for your meeting. This page does not appear if you click the Skip to Summary button after selecting the room and adding participants for the meeting.

To book resources for the meeting, perform the following steps:

- 
- Step 1** From the Resources pane, choose an item by clicking it.
- The equipment is added as a row to the table in the right pane which has the following columns:
- **Resource Name**—The name of the selected item.
  - **Notes**—Any additional requirements or specifications can be added here. For example, if you order a projector and need a special connecting cable for your laptop, you can mention it in this field.
  - **Location**—Enter the location for which you want the item to be supplied.
  - **Available Quantity**—The number of units of the item that are in stock and ready for use.
  - **Required Quantity**—Enter the number of the items that you want in this field. The number should not be more than the quantity available.
  - **Action**—Shows a cancel  icon that you can click to delete an individual item from the table. The entire row for the item is removed as a result of this action.
- Step 2** Repeat the procedure in [Step 1](#) for any additional resource(s) that you want. You can also choose an item already in the list if you want it for another location(s).
- Step 3** (Optional) To delete all the resources from the list and start the selection afresh, click **Delete All**.
- Step 4** Once you have entered all the details that you want in the Services page, you can click any of the following buttons:
- **Save and Proceed**—This saves all the settings and takes you to the Summary screen.
  - **Back**—This takes you back to the Rooms and Participants screen where you can change the conference rooms selection and modify the attendee list.
  - **Cancel**—This cancels the booking process and re-directs you to the home page.
- 

## Summary

This is the last screen of the New Reservation wizard. It appears when a user opts to finish the new booking process either from the Rooms and Participants page or the Services pages. The page displays all the meeting, room, equipment, and attendee details. Before the final confirmation screen is displayed, the entire booking summary is displayed. The booking takes place only after you verify the details from the summary and confirm.

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To confirm the booking, perform the following steps:

- 
- Step 1** Verify that the following details displayed in the Summary screen are per your booking requirements:
- **Subject**—Helps the participants know the purpose of the meeting. The  icon appears if it is a WebEx meeting.
  - **Date**—The date of the meeting. For recurring meetings, the date of the first meeting followed by dates of the other occurrences is displayed.
  - **Time**—The start and the end time of the meeting.
  - **Organizer**—Your username is displayed.
  - **Mark as Confidential**—Shows Yes if you have chosen the Mark as Confidential option in the Reservation Details screen; otherwise the value shown is No.
  - **Meeting Type**—Whether the meeting is a normal, team, presentation, or TelePresence meeting.
  - **Room Setup**—The room setup type is shown if you have chosen to re-arrange the room layout.
  - **Meeting Rooms**—The names of the meeting rooms along with the detailed location including the floor, building, campus, city, state, and country. The icons for the features available in the rooms are also shown. For example, A/V controls, TelePresence, and so on.
  - **Participants**—The names of the people that you have invited for the meeting.
  - **Resources**—The name of the items, the location for which they are ordered, the quantity that you require during the meeting, and the meeting notes.

**Step 2** Click **Confirm Reservation**.

This takes you to the page that confirms that the booking is done and the participants will be notified through email. It displays the entire summary again.




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**Note** You also receive emails whenever the invitees accept, tentatively accept, or decline the meeting request that you send to them.

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**Step 3** Click **Home** to return to the home page.

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## New Reservation Use Case

User A is an entrepreneur who resides in Dallas, USA and the marketing team is based in New Delhi, India. The following example describes how User A and the team coordinate using the Smart+Connected MS user portal.

1. User A logs in to the Smart+Connected MS user portal and uses the New Reservation option to organize a meeting for discussing the India strategy with the team. For more information about the New Reservation process, see the [“Creating a New Reservation” section on page 3-2](#).
2. Because the team is overseas and a personalized and interactive approach is required, User A chooses the TelePresence type of meeting and specifies the pre-launch task outline and objectives in the Agenda field. User A adds the main points of discussion in the Meeting Notes. When the team gets the meeting invitation through email, the message body displays the plan outline, objectives, and points of discussion. The team members get a basic idea about the purpose of the meeting. For more information, see the [“Reservation Details” section on page 3-3](#).

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3. To devise an effective plan and get regular inputs, User A schedules the meeting on Tuesday and Friday every two weeks for the critical 3-month period before the product launch using the Recurrence option.
4. The sales staff conducting the door-to-door surveys has already conveyed the inability to report to the main office every week. User A uses the Add WebEx meeting option. These team members can join the meeting using the link and password provided in the email invite.
5. Because the TelePresence facility is required for both the offices, User A enters the details of the Dallas campus in the Primary Location field and the details of the Bangalore campus in the Secondary Location field. If all the members on the India team, including the field staff attend the meeting, the total strength would be 30. Therefore, User A specifies 30, as the room size for the secondary location.
6. User A chooses the room from the search results and adds the participants by choosing their names from the automatic suggestions based on the list of company employees. For inviting an external member of the board and a marketing strategy expert whose names are not included in the database, the entrepreneur enters their email addresses in the Visitors field. For more information about choosing rooms and inviting participants, see the [“Rooms and Participants” section on page 3-5](#).
7. The global sales head pops into the entrepreneur’s office and suggests aggressive planning and very regular discussions. User A clicks Modify Search. This re-directs to the Booking Details page and the entrepreneur changes the frequency of the meeting to every one week.
8. User A then proceeds to book the laptop chargers and optical mice that the team may require during the meeting. This is delivered to the meeting room that is booked for India. For more information about booking resources, see the [“Services” section on page 3-7](#).
9. After verifying all the meeting details from the summary, User A confirms the booking. Invites are sent to all the participants by email. User A is notified through email whenever any of the participants accept, tentatively accept, or decline the invite. For more information about the meeting summary, see the [“Summary” section on page 3-7](#).
10. The marketing head in India, User B, wants to invite a few additional stakeholders for the first meeting. User B logs in to the Smart+Connected MS web portal, clicks the first meeting instance in the calendar and chooses the Edit Series option. User B adds another meeting room and a few more participants. For more information on editing meetings, see the [“Editing Meeting Details” section on page 4-3 in Chapter 4, “Managing Meetings Using the Portal”](#).
11. The corporate communication manager, User C, leaves for India to close the deals with the media agencies there. User C goes to the Preferences page in the portal and changes the time zone to GMT+5.30. This ensures that the calendar is in sync with the local time, that is, all the meeting invites are displayed in India time. For more information on changing your preferences, see the [“Configuring Meeting Preferences” section on page 4-4 in Chapter 4, “Managing Meetings Using the Portal”](#).
12. Once the initial meetings are conducted, work is assigned to all of the team members. A marketing executive, User D, realizes that all-day meetings are scheduled every Tuesday and Friday to supervise the market research activities and the executive would have to skip the meetings. User D logs in to the portal, clicks the meeting instance, and then clicks Decline. User A receives e-mails about the invite being declined and is therefore informed that User D would not attend the meetings. For more information on viewing meetings and accepting/declining meetings, see the [“Viewing Meetings” section on page 4-1 and “Accepting/Declining Meetings” section on page 4-3 in Chapter 4, “Managing Meetings Using the Portal”](#).



## Managing Meetings Using the Portal

---

This chapter explains how you can manage your meetings and set the meeting preferences using the Smart+Connected MS web portal.

- [Viewing Meetings, page 4-1](#)
- [Setup/De-Setup and Services Requests, page 4-1](#)
- [Using Saved Drafts, page 4-2](#)
- [Editing Meeting Details, page 4-3](#)
- [Accepting/Declining Meetings, page 4-3](#)
- [Deleting Meetings, page 4-4](#)
- [Configuring Meeting Preferences, page 4-4](#)

### Viewing Meetings

You can view all of your meetings using the calendar in the Smart+Connected MS web portal home page. For more information, see the [“Day View” section on page 2-4](#), [“Week View” section on page 2-4](#), and [“Month View” section on page 2-4](#) in Chapter 2, [“Smart+Connected MS Web Portal”](#).

The saved drafts are listed on the right hand side of the home page. For more information, see the [“Saved Drafts” section on page 2-5](#) in Chapter 2, [“Smart+Connected MS Web Portal”](#).



**Note**

You can also view all the meetings that you are a part of in your Microsoft Outlook calendar as the Smart+Connected MS meetings are synchronized with the Microsoft Exchange. You can accept, decline, join, edit, and delete the meetings from your mail client.

### Setup/De-Setup and Services Requests

If you are the facilities administrator, you will automatically get room setup and/or de-setup requests as email invites based on the time set by the Smart+Connected MS portal administrator. These service requests are similar to the other meeting invites and appear in the calendar when you log in to the Smart+Connected MS web portal. For the resource requests that the other portal users place while they book meetings, you receive emails similar to meeting invites informing you about the item and quantity required, and the time and place where the item is required.

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## Using Saved Drafts

During the process of booking a meeting, you can save the details you have entered and use them to organize a meeting at a later time. The Save Draft option is available in the Booking Details, Rooms and Attendees, and Services page. The changes that you make in any of these pages and the pages before them are saved as drafts. Once you organize a meeting using a draft, the draft is removed from the list of drafts.

To use a saved draft, perform the following steps:

- 
- Step 1** Log in to the Smart+Connected MS portal.
- The home page appears with the My Booking tab selected by default. The Saved Drafts list displayed in the right hand corner.
- Step 2** The list of saved drafts shows the most recently saved drafts on top followed by the previous ones. Only a certain number of drafts are shown per view. Click any of the page numbers to view the other drafts. To scroll through the drafts page list, click the following buttons:

-  Scroll the page list to the next page.
-  Scroll the page list to the last page.
-  Scroll the page list to the previous page.
-  Scroll the page list to the first page.




---

**Note** You can also use a saved draft from the list displayed in the Reservation Details page.

---

- Step 3** Click the edit  icon for the draft that you want to use.
- The Reservation Details screen appears populated with all the details that you entered earlier.
- Step 4** Make the required changes in the Booking Details page. Click **Save and Proceed**.
- The Rooms and Attendees page appears.




---

**Note** Instead of clicking Save and Proceed, you can click Save Draft in the Reservation Details or the Rooms and Participants screen. This replaces the existing draft with the current version, which you can use later.

---

- Step 5** Make the required changes or provide the additional details in the Rooms and Attendees page. Click **Save and Proceed**.
- The Services page appears.
- Step 6** Enter the required details in the Services page. Click **Save and Proceed**.
- The booking summary appears.
- Step 7** Click **Confirm Booking**.
- The Summary screen appears. You are informed that the booking is done. The draft is removed from the lists of drafts.
-

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## Editing Meeting Details

You can edit the meetings, which you have organized, from the meetings displayed in the calendar view in the home page. The invitees get an email informing them that the meeting has been edited. This email contains all of the updated details.

To edit a meeting, perform the following steps:

- 
- Step 1** Log in to the Smart+Connected MS portal.  
The home page appears with the My Booking tab selected by default.
- Step 2** In the calendar, click the meeting that you want to edit.  
The Edit Meeting dialog box appears.
- Step 3** Click **Detailed Edit**. For recurring meetings, click **Edit Occurrence** to edit the single instance of the meeting, that is, the one that you have clicked. Click **Edit Series** to make changes that apply to all the meetings instances.  
The Reservation Details screen opens.
- Step 4** Make the required changes in the Reservation Details, Rooms and Participants, and/or the Services screen and proceed to the Summary page. Click **Confirm Reservation**.
- 

## Accepting/Declining Meetings

You can accept, tentatively accept, or decline any meeting you have received using the calendar view in the Smart+Connected MS user portal home page.

To accept or decline a meeting, perform the following steps:

- 
- Step 1** Log in to the Smart+Connected MS portal.  
The home page appears with the My Booking tab selected by default. The list of meetings that you have organized appears in a pane on the right hand side of the page.
- Step 2** Click the meeting instance in the calendar view.  
The Meeting Details dialog box appears.
- Step 3** Review the meeting details, and click **Accept**, **Decline**, or **Tentative** based on your decision to attend the meeting.  
Clicking the Decline button removes the meeting from your calendar view. You can decline tentative or accepted meetings anytime later if you want. Alternatively, you can accept a meeting that you had marked earlier as tentative.



---

**Note** For recurring meetings, the Accept/Decline/Tentative option will apply to the entire series and not just the occurrence you clicked in the calendar.

---

- Step 4** (Alternatively) If you do not want to make any of the choices mentioned in [Step 3](#), click **Done** or click the cancel  icon in the top right corner to close the Meeting Details dialog box.
-

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## Deleting Meetings

You can delete the meetings that you have organized from the calendar in the home page. The invitees get an email informing them that the meeting is cancelled. The schedule of the room that you booked for the meeting is updated and the room is made available for booking again.

To delete a meeting, perform the following steps:

- 
- Step 1** Log in to the Smart+Connected MS portal.  
The home page appears with the My Booking tab selected by default.
- Step 2** Click the meeting you want to delete in the calendar.  
The Meeting Details dialog box appears.
- Step 3** Click **Delete**. For recurring meetings, click **Delete Occurrence** to delete the single instance of the meeting, that is, the one that you have clicked. Click **Delete Series** to delete all the recurrences.  
The deleted meeting(s) is removed from the calendar.
- 

## Configuring Meeting Preferences

You can configure settings such as your preferred rooms, time zone, and location using the the Preferences tab. This is the main tab in the portal along with the My Booking tab.

To configure your meeting settings, perform the following tasks:

- 
- Step 1** Log in to the Smart+Connected MS portal.  
The home page appears with the My Booking tab selected by default.
- Step 2** Click the Preferences tab.  
The My Preference page appears.
- Step 3** From the Time Zone drop-down list, choose your preferred time zone.  
All the meetings in the calendar view in the home page are displayed in your preferred time zone. The schedule of meeting rooms and participants while booking are also displayed in the preferred time zone. The meeting invites are visible to attendees based on the time zone that they choose.
- Step 4** From the Locale drop-down list, choose the required option.  
This determines the date format displayed to you in portal.
- Step 5** Perform the following steps in the Location area:
- Click the edit  icon.  
A dialog appears.
  - From the first drop-down list in the dialog, choose the country. From the second drop-down list, choose the state.
  - Click **Done**.  
The chosen country and state are listed next to the Country and State text fields.
  - Choose the city from the first drop-down list in the Location area.

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Another drop-down list appears.

- e. Choose the campus from the second drop-down list. Repeat the procedure to choose the building, and floor from the drop-down lists that appear.

The locations you choose here will be automatically populated every time you try to create a booking using the New Reservation wizard or the Quick Reservation option.

**Step 6** Perform the following steps in the Favorite Rooms area:

- a. Repeat the procedure mentioned in [Step 5](#) to choose the country, state, campus, building, floor, and meeting room from the drop-down lists.

- b. Click **Add room as Favorite**.

The room appears under the Favourite Rooms area.

- c. (Optional) Click the cancel  icon for any of the rooms, which appear under the Favourite Rooms area, to remove them from the list.

The rooms that you add as favorites appear with a star icon in the room search results and are displayed on the top of the list.

**Step 7** Click **Save**.

---



## Managing the Conference Room Resources

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This chapter describes how to control the various devices and equipment in a conference room using the IP phones at that location. It also describes how to achieve energy savings and send preconfigured messages to the signage outside of a conference room, from inside the conference room.

- [Using the IP Phones, page 5-1](#)
- [Features Available in IP Phones, page 5-3](#)
- [Managing the Conference Room Resources, page 5-3](#)
- [Releasing the Conference Rooms, page 5-12](#)
- [Sending Messages to the Signage Using the IP Phones, page 5-12](#)

### Using the IP Phones

You can use the touchscreen and non-touchscreen IP phones that are located in a conference room to control the devices that are available in that room, to report faults in the devices, and to send messages to the signage.

- [Touchscreen IP Phones, page 5-2](#)
- [Non-Touchscreen IP Phones, page 5-2](#)

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## Touchscreen IP Phones

Figure 5-1 displays sample output from a touchscreen IP phone located in a conference room.

**Figure 5-1 Touchscreen IP Phone**



Figure 5-1 displays details, such as the temperature of the room where the IP phone is located, the current date and time, and the meeting room schedule. Tap any of the icons displayed at the bottom of the screen to control the various devices in that room. In Figure 5-1, the icons for the lights, air conditioner, room mode, and reporting faults are seen. You can tap the left and right arrow icons to scroll to the other options. You can also press the keys located on the phone to navigate up and down in a list, or to choose and activate an option.

## Non-Touchscreen IP Phones

Figure 5-2 displays sample output from a non-touchscreen IP phone that is located in a conference room.

**Figure 5-2 Non-Touchscreen IP Phone**



The Figure 5-2 displays the name of the conference room, 'Senorita', on the top followed by the list of the options that help you control the conference room devices. You can select the required option from the list by pressing the number displayed against the menu item using the number pad of the phone. Alternately, you can use the phone navigation keys to navigate up and down the list and select a specific item.

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## Features Available in IP Phones

Table 5-1 lists the features that are available/can be accessed using the following devices:

- Touchscreen IP phones
- Non-Touchscreen IP phones

**Table 5-1**      **Features Available in IP Phones**

Features	Touchscreen IP Phone	Non-Touchscreen IP Phone
Date & Time	Y	Y
Temperature at Location	Y	N
Conference Room Name	Y	Y
Listing of Room Reservations	Y	N
Booking Rooms	Y	N
Releasing Rooms	Y	N
Reporting Faults	Y	Y
Sending Messages to Signage	Y	Y
Setting Room Modes	Y	Y
Controlling Blinds	Y	Y
Controlling Lights	Y	Y
Controlling Air-conditioner	Y	Y
Controlling A/V Equipment	Y	Y

Y=Yes, N=No

## Managing the Conference Room Resources

This section explains how to control the resources that are in a conference room using an IP phone. You can change the settings of lights, window blinds, the airconditioner, and audio and visual equipment. Multiple devices can be simultaneously controlled using the room mode options. You can use the IP phone to report the problems that occur in the conference room, so that a case is created in the trouble ticketing system.

- [Controlling the Lights, page 5-4](#)
- [Controlling the Window Blinds, page 5-5](#)
- [Controlling the Airconditioner Settings, page 5-7](#)
- [Controlling the Audio & Video Equipment, page 5-8](#)
- [Reporting Faults for the Location, page 5-9](#)
- [Activating the Room Modes, page 5-10](#)

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## Controlling the Lights

The Light Control feature allows you to control the lights and/or the dimmer at a particular location through the IP phone that is available at that location. You can control the lights by switching them on or off, and by adjusting the brightness using a predefined list of brightness options that are available.

The light dimmer option will be available only if a dimmer is added to the configuration for the location.



### Note

If the Light Control feature is not available for a location, the “Light controls are not available for this location” message appears.

The following default light control options are available:

- Lights Off—Turns off the lights.
- Lights On—Turns on the lights.

The following dimmer control options are available:

- 3% Brightness—Adjusts the brightness to 3%.
- 30% Brightness—Adjusts the brightness to 30%.
- 50% Brightness—Adjusts the brightness to 50%.
- 75% Brightness—Adjusts the brightness to 75%.
- 100% Brightness—Adjusts the brightness to 100%.



### Note

The icons displayed on the touchscreen IP phones represent the actual state of the device. For example, when a light is on, you see the light icon as yellow. When you turn off a light or it is already off, the light icon appears grey.

- [Using the Touchscreen IP Phone, page 5-4](#)
- [Using the Non-Touchscreen IP Phone, page 5-5](#)

## Using the Touchscreen IP Phone

To control the lights using a touchscreen IP phone, perform the following steps:

**Step 1** On the IP phone, press the **Services** button.

The list of services that are available for the IP phone appears.

**Step 2** Tap **S+CC Service**.

The S+CC Service screen appears.



### Note

For this guide, it is assumed that the name of the Smart+Connected MS service configured in CUCM is ‘S+CC Service’.

**Step 3** Tap the lights  icon.

Multiple light icons with numbers, such as 1, 2, and so on appear. You also have an icon to control all the lights together.

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**Note** Similar text-based options appear for the non-touchscreen IP phones.

---

- Step 4** Tap the icon for the required light.  
The various light control icons appear.
- Step 5** Tap the required light control icon to activate it.
- Step 6** Tap **Back** to go back to the previous screen.
- 

## Using the Non-Touchscreen IP Phone

To control lights using a non-touchscreen IP phone, perform the following steps:

- 
- Step 1** On the IP phone, press the **Services** button.  
The list of services that are available for the IP phone appears.
- Step 2** Choose **S+CC Service**.  
The S+CC Service screen appears.
- Step 3** Choose **Lights Control** from the list using the navigation keys on the IP phone.  
The list of available lights, such as Light1, Light2, and so on appears. You also have the Lights All option to control all the lights at a time.
- Step 4** Select the required light option.  
The list of light control options appears.
- Step 5** Navigate to the desired light option using the navigation keys.
- Step 6** Press the **Select** button to activate the light control option.
- Step 7** Press the **Back** button to go back to the previous screen, or press **Exit** to return to the S+CC Service screen.
- 

## Controlling the Window Blinds

The Blinds Control feature allows you to control the window blinds in a conference room. You can select either one blind or all of the blinds to open or close them.

If there is more than one blind, additional options, such as Blind1, Blind2, and so on appear. You also have the option to control all the blinds at a time.

The default window blinds options are as follows:

- Blinds Open—Opens the window blinds.
- Blinds Close—Closes the window blinds.
- Blinds Stop—Stops the window blinds.

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- [Using the Touchscreen IP Phone, page 5-6](#)
- [Using the Non-Touchscreen IP Phone, page 5-6](#)

### Using the Touchscreen IP Phone

To control the window blinds using a touchscreen IP phone, perform the following steps:

- 
- Step 1** On the IP phone, press the **Services** button.  
The list of services that are available for the IP phone appears.
- Step 2** Tap **S+CC Service**.  
The S+CC Service screen appears.
- Step 3** Tap the blinds  icon.  
Multiple blind icons with numbers, such as 1, 2, and so on appear. You also have an icon to control all the blinds together.
- Step 4** Tap the icon for the required blind.  
The various blind control icons appear.
- Step 5** Tap the required blind control icon to activate it.  
The blind is set to the selected state.
- Step 6** Tap **Back** to go back to the previous screen.
- 

### Using the Non-Touchscreen IP Phone

To control blinds using a non-touchscreen IP phone, perform the following steps:

- 
- Step 1** On the IP phone, press the **Services** button.  
The list of services that are available for the IP phone appears.
- Step 2** Choose **S+CC Service**.  
The S+CC Service screen appears.
- Step 3** Choose **Blinds Control** from the list using the navigation keys on the IP phone.  
The list of available blinds, such as Blind1, Blind2, and so on appears. You also have the Blinds All option to control all the blinds at a time.
- Step 4** Choose the required blind.  
The list of blind control options appears.
- Step 5** Navigate to the required blind control option using the navigation key.
- Step 6** Press the **Select** button to activate the selected blind control option.
- Step 7** Press the **Back** button to go back to the previous screen, or press **Exit** to return to the S+CC Service screen.
-

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## Controlling the Airconditioner Settings

The airconditioner control feature allows you to set the temperature of the conference room as per your preference.



**Note** If a thermostat is not associated to the location, a warning message appears informing you that the thermostat control (set points) is not available for the location.

The default temperature control options are as follows:

- Air-con On—Changes the airconditioner settings to the Occupied mode.
- Air-con Off—Changes the airconditioner settings to the Energy Savings mode.
- Temperature Range—The list of temperature set options that are available for the location.

The temperature set options are based on the minimum and maximum values that are entered when associating the VAV device for the location.

For example, if the minimum temperature value is 21 and the maximum temperature is 25, the temperature set points will be in increments of 1, that is from 21 to 25. The unit of temperature may be Fahrenheit (°F) or Celsius (°C) depending on the unit that is selected when associating the VAV/VRV device for the location.

- [Using the Touchscreen IP Phone, page 5-7](#)
- [Using the Non-Touchscreen IP Phone, page 5-7](#)

## Using the Touchscreen IP Phone

To control the temperature using a touchscreen IP phone, perform the following steps:

**Step 1** On the IP phone, press the **Services** button.

The list of services that are available for the IP phone appears.

**Step 2** Tap **S+CC Service**.

The S+CC Service screen appears.

**Step 3** Tap the air conditioner  icon.

The various temperature control icons  appear.

**Step 4** Tap the required temperature control icon.



**Note** The value that you provide here will be used to set the temperature set point value. Once this is done, the occupancy status of the conference room will be set as “Occupied”.

**Step 5** Tap **Back** to go back to the previous screen.

## Using the Non-Touchscreen IP Phone

To control the temperature using a non-touchscreen IP phone, perform the following steps:

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- 
- Step 1** On the IP phone, press the **Services** button.  
The list of services that are available for the IP Phone appears.
- Step 2** Choose **S+CC Service**.  
The S+CC Service screen appears.
- Step 3** Choose **Aircon** from the list using the navigation keys on the IP phone.  
The list of temperature control options that are available for the location appears. For example: 16 degree, 20 degree and so on.
- Step 4** Choose the required temperature control feature.
- Step 5** Press the **Back** button to go back to the previous screen, or press **Exit** to return to the S+CC Service screen.
- 

## Controlling the Audio & Video Equipment

The A/V Control feature allows you to control the projector equipment using the IP phone at the location. You can configure a room for a personal computer presentation or a meeting using the IP phone.

If the A/V Control feature is enabled for a location and the A/V devices are not added/configured correctly, the “Controls are not available for this location” warning message appears.

The A/V Control options that are available are as follows:

- Projector On—Allows you to switch on the projector and bring down the projector screen.
- Projector Off—Allows you to switch off the projector and roll up the projector screen.
- [Using the Touchscreen IP Phone, page 5-8](#)
- [Using the Non-Touchscreen IP Phone, page 5-9](#)

## Using the Touchscreen IP Phone

To control the audio and video equipment using a touchscreen IP phone, perform the following steps:

- 
- Step 1** On the IP phone, press the **Services** button.  
The list of services that are available for the IP phone appears.
- Step 2** Tap **S+CC Service**.  
The S+CC Service screen appears.
- Step 3** Tap the A/V controls  icon.  
The icons for switching on  and switching off  the projector appear. Tap the required icon.
- Step 4** Tap **Back** to go back to the previous screen.
-

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## Using the Non-Touchscreen IP Phone

To control the audio and video equipment using a non-touchscreen IP phone, perform the following steps:

- 
- Step 1** On the IP phone, press the **Services** button.  
The list of services that are available for the IP phone appears.
- Step 2** Choose **S+CC Service**.  
The S+CC Service screen appears.
- Step 3** Choose **A/V Control** from the list using the navigation keys.  
The projector on and off controls are listed.
- Step 4** Navigate to the required A/V control option.
- Step 5** Press the **Select** button to activate the selected option.
- Step 6** Press the **Back** button to go back to the previous screen, or press **Exit** to return to the S+CC Service screen.
- 

## Reporting Faults for the Location

The Fault Reporting feature allows you to report the faults at the location to the case management system. You can select a fault from a predefined list for the meeting room. After you select a fault and enter your employee ID, a case is created in the case management system. After you report a fault, you receive a confirmation message with a unique case number. The case is routed to the appropriate team for resolution in the case management system.

In the absence of a case management system like Remedy, the Smart+Connected MS solution can be configured to use email as a mechanism to raise the cases. In this scenario, when a case is raised from the IP phone, an email will be sent to the configured email ID with the fault item details.

- [Using the Touchscreen IP Phone, page 5-9](#)
- [Using the Non-Touchscreen IP Phone, page 5-10](#)

## Using the Touchscreen IP Phone

To report a fault using a touchscreen IP phone, perform the following steps:

- 
- Step 1** On the IP phone, press the **Services** button.  
The list of services that are available for the IP phone appears.
- Step 2** Tap **S+CC Service**.  
The S+CC Service screen appears.
- Step 3** Tap the create case  icon.  
The list of available faults appears.
- Step 4** Choose a fault.
- Step 5** Enter your User ID using the keypad.

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- Step 6** Tap **Submit**. A case is created in the case management system for the selected fault and:
- A confirmation message is displayed on the IP phone with the case ID, in case the Remedy case management tool is used.
  - A confirmation email is sent, in case the an email-based case management option is used.
- Step 7** Tap **Back** to go back to the previous screen.
- 

## Using the Non-Touchscreen IP Phone

To report a fault using a non-touchscreen IP phone, perform the following steps:

- 
- Step 1** On the IP Phone, press the **Services** button.  
The list of services that are available for the IP phone appears.
- Step 2** Choose **S+CC Service**.  
The S+CC Service screen appears.
- Step 3** Choose **Create Case** from the list using the navigation keys on the IP phone.  
The list of available faults appears.
- Step 4** Choose a fault.  
The Fault Reporting screen appears.
- Step 5** Enter your **User ID** using the keypad.
- Step 6** Press the **Submit** button. A case is created in the case management system for the selected fault and:
- A confirmation message is displayed on the IP phone with the case ID if the Remedy case management tool is used.
  - A confirmation email is sent if an email based case management tool is used.
- Step 7** Press the **Back** button to go back to the previous screen, or press **Exit** to return to the S+CC Service screen.




---

**Note** The case is not created if the Product Category1, Product Category2, and Facilities do not match the categories that are specified in the case management system.

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## Activating the Room Modes

The Room Mode feature allows you to configure various devices in a conference room for presentations and meetings by choosing a single option from the IP phone. This feature controls the lights, blinds, projector, and projector screen at the location of the IP phone. There are three different room modes with predefined settings for the devices. You can choose either a presentation mode for the night or a presentation mode for the day. After the presentation is over, you can opt for the normal mode to return the devices to the non-presentation state.

After a Room Mode is applied, you can change the status of any device by going back to the S+CC Service screen. The change made does not affect the status of other equipment.

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### **Using the Touchscreen IP Phone**

To activate room modes for a conference room using a touchscreen IP phone, perform the following steps:

- 
- Step 1** On the IP phone, press the **Services** button.  
The list of services that are available for the IP phone appears.
- Step 2** Choose **S+CC Service**.  
The S+CC Service screen appears.
- Step 3** Tap the room modes  icon.  
The room mode icons that appear are as follows:
- a. Presentation Mode–Day: Lights 3%, blinds closed, projector on, and the projector screen is down.
  - b. Presentation Mode–Night: Lights dimmed to 3% if they are on (or not turned on if they are already off), projector on, and the projector screen is down.
- The Normal Mode is available as a toggle option in the touchscreen IP phones. You can tap the icon for the selected mode to change the settings to Normal Mode (Lights off, projector off, and the projector screen is up).
- Step 4** Choose a room mode.
- Step 5** Tap **Back** to return to the previous screen.
- 

### **Using the Non-Touchscreen IP Phone**

To activate the room modes for a conference room using a non-touchscreen IP phone, perform the following steps:

- 
- Step 1** On the IP phone, press the **Services** button.  
The list of services that are available for the IP phone appears.
- Step 2** Choose **S+CC Service**.  
The S+CC Service screen appears.
- Step 3** Choose the **Room Modes** option from the list by using the navigation keys on the IP phone.  
The room mode options that appear are as follows:
- a. Presentation Mode–Day: Lights 3%, projector on, and the projector screen is down
  - b. Presentation Mode–Night: Lights dimmed to 3% if they are on (or not turned on if they are already off), projector on, and the projector screen is down
  - c. Normal Mode–Lights Off, projector off, and the projector screen is up
- Step 4** Navigate to the required room mode option, and press **Select** to activate it.

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**Step 5** Press the **Back** button to return to the previous screen, or press **Exit** to return to the S+CC Service screen.

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## Releasing the Conference Rooms

If you do not want to use the room for the entire duration of the reservation, you can release the room on completion of the meeting using the IP phone in the conference room. The room is shown in a different color on the IP phone and signage display so that other users know that it is available. They cannot reserve the conference room till the duration of your booking ends but can use the room without actually booking it. After a room is manually released, the following settings are automatically applied:

- The projector is switched off (if it was switched on).
- The projector screen is rolled up (if it was rolled down).
- The airconditioner reverts to the Energy Saving mode.

### Using the Touchscreen IP Phone

To release a room early using a touchscreen IP phone, perform the following steps:

- 
- Step 1** On the IP phone, press the **Services** button.  
The list of services that are available for the IP phone appears.
- Step 2** Tap **S+CC Service**.  
The S+CC Service screen appears.
- Step 3** Tap the release room  icon that is displayed next to the meeting details.  
The “Please confirm that your meeting has ended and you are releasing the room” message appears.
- Step 4** Tap **Confirm** to release the room, or tap **Cancel** to go back to the S+CC Service screen.
- 



**Note**

The release room icon is displayed only after the meeting time starts.

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**Note**

This feature is not available in non-touchscreen IP phones.

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## Sending Messages to the Signage Using the IP Phones

The Signage Message feature allows you to send messages to the signage that is associated to a room.

The messages that are added to the location using the Smart+Connected Meeting Spaces solution are displayed in the IP phone.



**Caution**

No warning message is displayed if a signage device is not associated to the location.

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### **Using the Touchscreen IP Phone**

To send a message using a touchscreen IP phone, perform the following steps:

- 
- Step 1** On the IP phone, press the **Services** button.  
The list of services that are available for the IP phone appears.
- Step 2** Tap **S+CC Services**.  
The S+CC Services screen appears.
- Step 3** Tap the signage  icon.  
The list of messages that are available for the location appears.
- Step 4** Tap the required message.  
The selected message is displayed on the signage associated to the room.
- Step 5** Tap **Back** to return to the home page.
- 

### **Using the Non-Touchscreen IP Phone**

To send a message using a non-touchscreen IP phone, perform the following steps:

- 
- Step 1** On the IP phone, press the **Services** button.  
The list of services that are available for the IP phone appears.
- Step 2** Choose **S+CC Service**.  
The S+CC Service screen appears.
- Step 3** Choose **Signage** from the list by using the navigation keys on the IP phone.  
The list of messages that are available for the location appears.
- Step 4** Select the required message.  
The selected message is displayed on the signage that is associated to the location.
- Step 5** Press **Back** to return to the previous screen, or press **Exit** to return to the S+CC Service screen.
-



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