User Guide for Cisco Unified Videoconferencing Manager Release 5.5

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CHAPTER 1

Introducing Resource Manager

Logging in to Resource Manager

Procedure

Step 1 Open your browser and enter the Resource Manager URL.

Step 2 Enter your user ID and password in the Resource Manager login screen.

Step 3 Check **Remember User ID and Password** to use the user ID and password for the next login.

Step 4 For SSO (Single Sign On) users, add the Cisco Unified Videoconferencing Manager host server to the Internet Explorer trusted site list on the local machines belonging to your users.

Step 5 Click **Login**.

Accessing In-meeting Control

You can enter a meeting directly without having to log in to the Resource Manager.

Procedure

Step 1 Click **Enter a Meeting** in the Resource Manager login screen.

Step 2 Enter the ID of the desired meeting.

Step 3 Enter the meeting PIN, if there is one.

Step 4 Click **Login**.

User Types

Resource Manager enables you to log in as a Meeting Organizer or a Regular User.

Each user type has a default set of permissions and a default view of the user interface. Table 1-1 outlines the differences between the default permissions for each user type.

Table 1-1 Resource Manager User Types and Default Permissions

Resource Manager Permissions	Meeting Organizer	Regular User
View scheduled meetings	x	x
Receive and respond to meeting notices	x	x
Schedule, modify and cancel meetings	x	
In-meeting control	x	x
Manage personal address book	x	
Modify own profile	x	x
Manage own virtual room	x	

Note In-meeting control is PIN-protected. A user needs the Moderator PIN to perform in-meeting control operations.

CHAPTER 2

Scheduling Meetings in Resource Manager

Meeting Scheduling Workflow

To schedule a meeting you must configure each of the tabs in the Meeting Scheduling section. We recommend that you start with the Basic tab and then configure each of the remaining tabs in the the order that they appear in the Meeting Scheduling user interface.

Table 2-1 Meeting Schedule Tabs (in order of appearance)

Tab	Description
Basic	Displays meeting information, such as the meeting type, and the date and time of the meeting, and whether or not the meeting is a recurring meeting.
Invite	Invite participants (both users and terminals) to the meeting. Can also reserve MCU ports for dial-in participants.
Attendees Settings	Displays the settings for meeting participants, such as dial-in/dial-out mode.
Attendees Availability	Displays a calendar with the availability of selected attendees.
Advanced	Displays advanced meeting options.

The Attendees Settings, Attendees Availability, and Advanced tabs are hidden by default and can be activated by the Administrator via Admin > Advanced Settings > Look and Feel.

Defining Meeting Properties

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

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

By default, the Basic tab displays and the start time is set to Now.

If the Administrator has modified the default behavior, an option menu displays allowing you to select a Normal conference, a Recurrence, or an Ad Hoc conference.

Select one of the options to schedule a meeting. The Basic tab displays.

Step 2 If the Meeting ID field displays, a random ID is generated for this meeting. You can edit the meeting ID.

If the Meeting ID field does not display, a random ID is generated for this meeting after it is successfully scheduled.

Step 3 Click the calendar icon next to the Start Time field to specify the start time of the meeting.

Specify the exact date and time in the popup window. By default, the start time is Now.

If you specify a start time that is in the future, the End Time field displays. The End Time value is equal to the start time + the duration of the meeting.

You can change the meeting duration by overriding the value in the Duration field.

Step 4 Enter a meeting subject.

A subject is required to schedule a meeting.

Step 5 Select a meeting type.

A meeting type is required to schedule a meeting.

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

Step 6 (Optional) Click **Recurrence** to define the recurrence details for a recurring meeting.

The Recurrence button is only enabled if the meeting start time is not **Now**.

Step 7 (Optional) Define the meeting access PIN in the **Conference PIN** field.

Only integers are allowed. This PIN allows you to join a PIN-protected meeting.

Step 8 (Optional) Define the PIN that allows a user to perform moderation operations on a meeting in the **Moderator PIN** field.

Only integers are allowed. This PIN allows you to take control of a meeting from the In-meeting Control interface or from the endpoint using DTMF. Meeting Operators can access the In-meeting Control screen without using the Moderator PIN.

Step 9 If the Moderator PIN is provided by the meeting scheduler, the meeting scheduler can optionally turn on the waiting room functionality by checking **Place participants in a 'waiting room' until the moderator joins the meeting**.

Before the host joins the meeting, all connected participants are put into waiting room mode where they cannot hear or see one another. When the host terminal joins the meeting, the waiting room mode is removed and all participants can see and hear each other.

You can unlock the waiting room mode by taking control of the In-meeting Control screen after entering the moderator PIN and clicking **Unlock waiting room**.

Step 10 For Cisco Unified Videoconferencing Desktop meetings, you can specify whether the meeting will allow streaming by selecting the default streaming mode.

The default streaming mode determines the initial streaming state. Streaming can be disabled or enabled during the meeting by any Cisco Unified Videoconferencing Desktop Client that has meeting moderation rights.

Step 11 (Optional) Enter a description of the scheduled meeting for future reference.

The Description field is hidden by default. If you cannot see this field, contact your system administrator.

Step 12 Click **Resource Availability** to view the MCU resources available in the network for a particular meeting type.

The MCU resources are displayed with the number of available ports for a given time period of time.

Step 13 Perform one of the following:

- Click **Next** to proceed with setting additional meeting scheduling options.
- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14
- Moderating Meetings in Resource Manager, page 4-1

Scheduling a Virtual Room Meeting

The virtual room facility enables you to set predefined attributes, such as meeting type and PIN, to customize your meetings.

You associate an identifying number with each virtual room. Other users simply dial the virtual room number to establish a meeting using the customized attributes of the virtual room.

When scheduling a meeting in a virtual room, you use the predefined attributes of that virtual room as preferred settings for the meeting.

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click the **Load Virtual Rooms** icon at the top of any tab of the Meeting Scheduling section.

Step 3 Select a virtual room from the list and click **OK**.

Resource Manager loads the customized configurations of the virtual room.

Step 4 Click **Finish** to schedule a meeting in this virtual room.

How to Invite Participants or Terminals to the Meeting

- Searching for a Participant or Terminal, page 2-4
- Selecting a Participant or Terminal, page 2-5
- Adding a New Participant or Terminal, page 2-6
- Reserving Extra Ports, page 2-6

Searching for a Participant or Terminal

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Invite**.

Step 3 Enter the partial or complete name of the participant or terminal in the Names field.

Step 4 Select the source from which to search for resources or participants.

You can select Organization Groups, Address Book or All Terminals from the Select From drop-down list.

If you do not see one of these options, contact your system administrator.

Step 5 Click **Search**.

Search results are listed.

Step 6 To return to the complete list of participants, clear the Names field, and then click **Search**.

Step 7 Use the arrow buttons to move entries between the Available Participants and Selected Participants lists.

Step 8 If you do not want to set any additional information, perform one of the following:

- Click **Next** to proceed with setting additional meeting scheduling options.
- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14

Selecting a Participant or Terminal

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Invite**.

Step 3 Use the arrow buttons to move entries between the Available Participants and Selected Participants lists.

By default, each page displays up to 50 entries.

The Available Participants list includes users or terminals depending on the selection in the Select From list.

Step 4 By default, the meeting organizer is displayed in the Select Participant list. Disable this behavior at **My Profile > My Preferences > Don't include me in the meeting**.

Step 5 If you do not want to set any additional information, perform one of the following:

- Click **Next** to proceed with setting additional meeting scheduling options.
- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14

Adding a New Participant or Terminal

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Invite**.

Step 3 Enter the required information about the participant or terminal in the lower half of the screen.

You must provide at least the e-mail address of the user or the number of the terminal that you want to add.

Step 4 Select **Save to my address book** to add the participant to your address book.

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

Step 6 If you do not want to set any additional information, perform one of the following:

- Click **Next** to proceed with setting additional meeting scheduling options.
- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14

Reserving Extra Ports

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Invite**.

Step 3 Select **Reserve additional ports** to reserve additional MCU ports for unknown participants.

Step 4 Enter the required number of additional ports.

Step 5 If you do not want to set any additional information, perform one of the following:

- Click **Next** to proceed with setting additional meeting scheduling options.
- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14

How to Customize Participant and Terminal Settings

Selecting a Terminal for a Participant

This option is not available for non-video conferences.

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Attendees Settings**.

If you do not see this tab, contact your system administrator.

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

Step 4 Select a terminal from the list in the Select Terminal window or click **Specify custom terminal** to add an external number.

Step 5 Enter the required terminal name, and then click **OK**.

Step 6 For a PSTN/ISDN terminal designated as an ISDN connection for the meeting, select **PSTN/ISDN**.

This option is unavailable for non-PSTN/ISDN terminals.

Step 7 If you do not want to set any additional information, perform one of the following:

- Click **Next** to proceed with setting additional meeting scheduling options.
- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14

Defining Participant Dialing Options

This option is not available for non-video conferences.

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Attendees Settings**.

If you do not see this tab, contact your system administrator.

Step 3 Select **Dial-in** for dial-in attendees.

Step 4 If you expect a terminal to join the meeting by dialing in (rather than by being dialed to when the meeting starts), select **Dial-in** for the terminal.

If a PSTN/ISDN terminal is missing the country code, area code or phone number, the terminal is forced to join in dial-in mode only.

Step 5 If you do not want to set any additional information, perform one of the following:

- Click **Next** to proceed with setting additional meeting scheduling options.
- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14

Viewing Participant or Terminal Addressing

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Attendees Settings**.

If you do not see this tab, contact your system administrator.

Defining Participant Video Display Layout

This operation allows you to set the initial layout for terminals to which the MCU dials out. Make sure that there is no dynamic layout defined by the MCU service for this meeting type.

The layout of these terminals may change during the course of the meeting if additional terminals dial into the conference.

This option is not available for non-video conferences.

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Attendees Settings**.

If you do not see this tab, contact your system administrator.

Step 3 From the **View** list, select the layout that dial-out participants see.

You can view available layouts in the Layout display by clicking the numbered side-tabs.

The service selected for the meeting determines which layouts are available.

For a point-to-point conference, the attendees list should contain only two terminals, and the View column and Layout display are disabled.

Step 4 To include a terminal name in a specific subframe of the screen layout at the start of the meeting, drag and drop the **Change Layout** icon (located to the right of the View column for each terminal) into the Layouts display.

Step 5 If you do not want to set any additional information, perform one of the following:

- Click **Next** to proceed with setting additional meeting scheduling options.
- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14

Defining the Host of Your Meeting

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Attendees Settings**.

If you do not see this tab, contact your system administrator.

Step 3 Select a host in the **Host** field at the bottom of the screen.

A host can be either a participant or a terminal.

If waiting room mode is enabled, and the host has a terminal, the host can unlock the waiting room on joining the meeting.

Step 4 If you do not want to set any additional information, perform one of the following:

- Click **Next** to proceed with setting additional meeting scheduling options.
- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14

Using Lecture Mode

In Lecture Mode, the lecturer is displayed in one view and all other participants are displayed in the second view. The lecturer sees all the participants in the second view, while the participants see only the lecturer.

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Basic**.

Step 3 Enter a meeting ID and subject.

Step 4 Select a meeting type in which the Administrator has checked the Enable Lecture Mode option.

The host is designated as the lecturer and set to be displayed in the first view. All other participants are set to be displayed in the second view.

The host sees all the participants. The participants see only the host.

Step 5 If you do not want to set any additional information, perform one of the following:

- Click **Next** to proceed with setting additional meeting scheduling options.
- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14

Viewing Participant and Terminal Availability

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Attendees Availability**.

If you do not see this tab, contact your system administrator.

The legend at the top left of the window explains that T means “Terminal” and that U means “User”. In the case of a non-video conference, R means “Room”.

Purple represents “Busy” and white represents “Free”.

A one-week time period is displayed, beginning from the week that the meeting is scheduled to occur (no earlier than the present time).

Step 3 Perform one of the following:

- Click **Next** to proceed with setting additional meeting scheduling options.
- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14

Adding a Meeting Reference Code

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Advanced**.

If you do not see this tab, contact your system administrator.

Step 3 Enter a reference code for the specified meeting in the **Reference Code** field.

This reference code is used to identify a meeting record if the record exists in the external system.

Step 4 If you do not want to set any additional information, perform one of the following:

- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14

Configuring a Billing Destination

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Advanced**.

If you do not see this tab, contact your system administrator.

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

The cost of the meeting is billed accordingly.

Step 4 If you do not want to set any additional information, perform one of the following:

- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14

Defining How to End a Meeting

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Advanced**.

If you do not see this tab, contact your system administrator.

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

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

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

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

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

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

By default, you cannot automatically extend Resource Manager meetings to last more than four hours. If you need this default changed, contact your system administrator.

Step 7 If you do not want to set any additional information, perform one of the following:

- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14

Setting a Time Zone for a Meeting

Procedure

Step 1 Click **Meeting Scheduling** in the sidebar menu.

Step 2 Click **Advanced**.

If you do not see this tab, contact your system administrator.

Step 3 Select the required time zone from the list in the Time Zone field.

Step 4 If you do not want to set any additional information, perform one of the following:

- Click **Test** to test your scheduling request.
- Click **Finish** to complete the meeting scheduling procedure.

Related Topics

- How to Test and Complete the Scheduling, page 2-13
- Scheduling the Meeting, page 2-14

How to Test and Complete the Scheduling

When you have completed all selections in the Meeting Scheduling screens, you can either test to see if the meeting scheduling request would be successful or schedule the meeting and receive the meeting invitation.

- Testing the Meeting Scheduling Request, page 2-14
- Scheduling the Meeting, page 2-14
- Viewing a Summary of Your Meeting, page 2-14

Testing the Meeting Scheduling Request

This procedure describes how to test the scheduling request without actually scheduling the meeting.

Procedure

Step 1 Click **Test** on any tab of the Meeting Scheduling section.

Step 2 If the scheduling request fails, the application suggests alternative time slots for this scheduling request to be successful. You can either select a new time slot or change the scheduling parameters and then re-test.

Scheduling the Meeting

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

If network resources are available but non-required resources (such as terminals, users and rooms) are not, the meeting is automatically scheduled, notifications are sent, and a conflict list is created for the meeting organizer.

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

Procedure

Step 1 Click **Finish** on any tab of the Meeting Scheduling section.

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

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

Viewing a Summary of Your Meeting

Procedure

Step 1 Click **Finish** on any tab of the Meeting Scheduling section.

If the meeting is successfully scheduled, a Meeting Summary window displays the following information.

Step 2 Alternatively, go to My Meetings > Upcoming or My Meetings > History.

Step 3 Click the link to the meeting in the Subject column.

Step 4 Click **Meeting Summary**.

Built-in Meeting Types

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

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

How to Create Ad Hoc Meetings

You create an ad hoc meeting when you dial a random meeting ID from your endpoint or terminal without scheduling a meeting or a virtual room number. The system creates this random ad hoc meeting or virtual room meeting for you. When all participants leave the ad hoc meeting or the virtual room, it is terminated.

When you create an ad hoc meeting, Resource Manager reserves at least 30 minutes of resources for this meeting. The default length of an ad hoc meeting is controlled by the **Duration of Endpoint Initiated Calls n minutes** option in the Resource Manager Configuration Tool at **System Configuration** > **Scheduling Settings**.

If all participants leave the meeting within 30 minutes, the meeting terminates automatically.

If all participants stay in the meeting after 30 minutes, the meeting is auto-extended until all participants leave the meeting or there is a resource conflict.

- Creating Ad Hoc Point-to-Point Calls, page 2-16
- Creating Ad Hoc Multipoint Meetings using a Default Meeting Type, page 2-16
- Creating Ad Hoc Multipoint Meetings using a Non-Default Meeting Type, page 2-16
- Inviting Participants using MCU Delimiters, page 2-17
- Creating Ad Hoc Virtual Room Meetings, page 2-17
- Viewing Endpoint-Initiated Meetings, page 2-17

Note An endpoint-initiated meeting is only allowed if the administrator has enabled this meeting type. If you cannot initiate an ad hoc meeting, contact your system administrator.

Creating Ad Hoc Point-to-Point Calls

Procedure

Step 1 From your endpoint or terminal, dial the number of the endpoint or terminal you want to reach.

Step 2 If you cannot initiate an ad hoc meeting, contact your system administrator to verify the following:

- Your endpoint or terminal is registered to a gatekeeper managed by Resource Manager.
- The endpoint or terminal you want to reach is registered to a gatekeeper managed by Resource Manager.
- Resource Manager is configured to allow endpoint-initiated point-to-point calls.

Creating Ad Hoc Multipoint Meetings using a Default Meeting Type

Procedure

Step 1 Dial a meeting ID number that begins with the Resource Manager meeting ID prefix (by default, 6).

For example, 6789.

Resource Manager then uses the default meeting type to initiate the meeting.

For example, if the default meeting type is 85, other users can join the conference by dialing either 856789 or 6789.

Step 2 If you cannot initiate an ad hoc meeting, contact your system administrator to verify the following:

- Your endpoint or terminal is registered to a gatekeeper managed by Resource Manager.
- Resource Manager is configured to allow endpoint-initiated multipoint calls.

Creating Ad Hoc Multipoint Meetings using a Non-Default Meeting Type

Procedure

Step 1 Dial the meeting type prefix followed by a meeting ID number.

For example 856789 where 85 is the meeting type prefix and 6789 is the meeting ID number.

Other users can join the conference by dialing either 856789 or 6789.

Step 2 If you cannot initiate an ad hoc meeting, contact your system administrator to verify the following:

- Your endpoint or terminal is registered to a gatekeeper managed by Resource Manager.
- Resource Manager is configured to allow endpoint-initiated multipoint calls.

Inviting Participants using MCU Delimiters

By default, ** is the MCU delimiter for inviting an endpoint to a meeting, and *** is the MCU delimiter for the meeting password.

Procedure

Step 1 Dial the following in a single string:

- The meeting type prefix followed by a meeting ID number.
- **
- The number of the endpoint or terminal you want to invite.
- ***
- The meeting password.

For example, 856789**5656***1111.

Step 2 If you cannot initiate an ad hoc meeting, contact your system administrator to verify the following:

- Your endpoint or terminal is registered to a gatekeeper managed by Resource Manager.
- Resource Manager is configured to allow endpoint-initiated multipoint calls.
- The MCU is configured to use default delimiter settings.

Creating Ad Hoc Virtual Room Meetings

Depending on your system configuration, you might be limited to ad hoc virtual meetings.

You can create an ad hoc virtual room meeting as follows:

Procedure

Step 1 Access a terminal.

Step 2 Dial a virtual room number.

For example, define0 a virtual room with number 6555 and meeting password 1234.

When 6555 is dialed from an endpoint, a virtual room meeting begins. The meeting ID is 6555, and anyone wanting to join the conference must enter the password 1234.

Viewing Endpoint-Initiated Meetings

Procedure

Step 1 Verify with your system administrator that Resource Manager is configured to display endpoint-initiated calls.

Step 2 Click **My Meetings** in the sidebar menu.

Step 3 Click **Current**.

Step 4 Alternatively, you can view the In-meeting Control interface of an endpoint-initiated meeting from the Resource Manager login screen.

Click **Enter a meeting** and type the meeting ID and PIN to access that meeting.

CHAPTER 3

Managing Meetings in Resource Manager

Viewing Your Meetings

Procedure

Step 1 Click **My Meetings** in the sidebar menu.

Step 2 Click **Current** to see all your meetings that are currently in progress.

Step 3 Click **Upcoming** to see all your meetings that have not yet started.

Step 4 Click **History** to see all your meetings that have already finished.

Only meetings that meet at least one of the following criteria are displayed:

- You are a participant in the meeting.
- You are the owner of a virtual room used in the meeting.
- You are the organizer of the meeting.

If you do not get the expected result when you click History, contact your system administrator.

Viewing the Creation Status of Your Meetings

Procedure

Step 1 Click **My Meetings** in the sidebar menu.

Step 2 Click **Current** to see all your meetings that are currently in progress.

Step 3 Click **Upcoming** to see all your meetings that have not yet started.

Step 4 Click **History** to see all your meetings that have already finished.

The creation status of each of the displayed meetings is shown in the Status column.

If the status column is colored green, the meeting was successfully created and all meeting participants are in the meeting.

If the status column is colored red, Resource Manager has failed to create the meeting.

Step 5 To view the Reason Failed error message, click the **red status indicator**, and then click **Retry** to resend the meeting information to the MCU.

Searching for a Meeting

Procedure

Step 1 Click **My Meetings** in the sidebar menu.

Step 2 Click **Current**, **Upcoming** or **History**, as required.

Step 3 Perform any of the following:

- Enter the partial or complete subject of the meeting in the **Subject** field.

  If any part of the meeting subject matches the search string, the meeting record is displayed in the search results.
- Enter the E.164 number of an attending terminal in the **E164** field.

  If any part of the meeting subject matches the search string, the meeting record is displayed in the search results.
- Click the calendar icon in the From field, and select a date and time in the window that opens.

  Meetings scheduled after the selected time are listed.
- Click the calendar icon in the To field, and select a date and time in the window that opens.

  Meetings scheduled before the selected time are listed.
- Enter the partial or complete meeting ID in the **Meeting ID** field.

  If any part of the meeting ID matches the search string, the meeting record is displayed in the search results.

Step 4 Click **Search**.

Search results are listed.

Step 5 To return to the complete list of meetings, clear each of the fields.

Step 6 Click **Search**.

Monitoring a Meeting

You can monitor and moderate a meeting in which you are a participant or the organizer via the In-Meeting Control interface for the meeting.

Procedure

Step 1 Click **My Meetings** in the sidebar menu.

Step 2 Click **Current**.

Step 3 Click the link in the **Subject** field for the meeting you want to monitor.

Step 4 Enter the moderator PIN if one is used for this meeting.

Step 5 Click the Take Control icon.

The In-meeting Control interface is not available for meetings in which you are not a participant or the organizer.

Related Topics

- Moderating Meetings in Resource Manager, page 4-1

Generating Reports

On the Upcoming and History tabs, you can generate a report in .csv format which shows all meetings scheduled between selected dates (as specified in the To and From fields). Once you have saved a report, you can view it with Microsoft Excel.

Procedure

Step 1 Click **My Meetings** in the sidebar menu.

Step 2 Click **Upcoming** or **History**, as required.

Step 3 Click the calendar icon in the From and To fields to choose a start and end date for information in the generated report.

Step 4 Click **Generate Report**.

Table 3-1 describes the information categories that are included in a generated report.

Table 3-1 Generated Report Information Categories

Category	Description
Virtual Meeting ID	Dialable meeting ID used by users to access a specific meeting.
Master Meeting ID	Corresponds to a physical meeting ID on the master MCU.
Slave Meeting ID	Corresponds to a physical meeting ID on the slave MCU.
Cisco Unified Videoconferencing Manager Meeting ID	Internal database ID for the meeting.
Subject	Corresponds to Subject field in Meeting Scheduling.
Meeting Type	Corresponds to the Meeting Type field in Meeting Scheduling. The name of the meeting type is displayed.
Reference Code	Corresponds to the Reference Code field in Meeting Scheduling.
Start Time	Corresponds to the Start Time field in Meeting Scheduling.
Duration	Corresponds to the Duration field in the Meeting Scheduling.
Meeting Room	Meeting room used for scheduling a meeting.
Organizer Name	Corresponds to the Organizer field in Meeting Scheduling.
Service Prefix	MCU service prefix used for the meeting.
Services	MCU service used for the meeting.
MCU Name(s)	MCU(s) used for the meeting. For cascaded meetings, "(master)" appears after the MCU name.
Terminals	Number of terminals used for the meeting.
Number of Extra IP Ports Reserved	Corresponds to the Reserve additional ports field in Meeting Scheduling.
Dial-in IP Terminals	Number of dial-in IP terminals.
Dial-out IP Terminals	Number of dial-out IP terminals.
Dial-in ISDN Terminals	Number of dial-in PSTN/ISDN terminals.
Dial-out ISDN Terminals	Number of dial-out PSTN/ISDN terminals.
Gateway List	Gateways used for the meeting.
Device Failure Cause (Device Name, IP Failure, Cause)	Any failure on a network device such as an MCU or gateway.
Attendee Failure Cause (Name, Number, ISDN, Dial-in, Total Time, Failing Attempts, Last Failure Cause)	Any failures on attending terminals.

Step 5 Click **Save** to save the report to a location of your choice.

Responding to a Meeting Invitation

Procedure

Step 1 Click **My Meetings** in the sidebar menu.

Step 2 Click **Upcoming**.

Step 3 A red flag next to the subject of an upcoming meeting indicates that you have not responded to a meeting invitation sent by the meeting organizer. The mechanism is similar to Outlook Scheduling.

If you see a red flag, click the subject link to open the meeting details.

Step 4 Click **Accept** to accept the meeting.

The red flag is removed.

Step 5 Click **Tentative** to tentatively accept the meeting.

You can enter a message in your meeting invitation response.

An e-mail response is sent to the meeting organizer containing your response.

The red flag is still displayed next to the meeting entry in the My Meetings screen.

Step 6 Click **Decline** to decline the meeting.

You can enter a message in your meeting invitation response.

An e-mail response is sent to the meeting organizer containing your response.

The meeting can no longer be accessed from the My Meetings screen.

The meeting organizer can view the meeting summary screen.

The meeting organizer can check the attendees list to see who will attend the meeting.

Attendees who decline the meeting invitation are automatically removed from the meeting summary.

Modifying Upcoming Meetings

You can reschedule the meeting, change the meeting parameters, or delete the meeting request.

For more information about specific fields, see Chapter 2, “Scheduling Meetings in Resource Manager”.

Procedure

Step 1 Click **My Meetings** in the sidebar menu.

Step 2 Click **Upcoming**.

Step 3 Click the subject of the meeting you want to modify in the In-meeting Control interface.

The In-meeting Control interface is not available for meetings in which you are not a participant or the organizer.

Step 4 Enter the required information.

Deleting Your Meeting History

All past meetings are deleted from the History tab.

Deleted meetings appear in billing and reporting statements.

History tab search results do not include deleted meetings.

Procedure

Step 1 Click **My Meetings** in the sidebar menu.

Step 2 Click **History**.

Step 3 Click **Delete History**.

Defining the Duration of the Meeting History Display

Procedure

Step 1 Click **My Profile** in the sidebar menu.

Step 2 Click **My Preferences**.

Step 3 Check **Delete meeting history items older than n days** and enter the required number of days.

CHAPTER 4

Moderating Meetings in Resource Manager

Taking Moderator Control

Meeting moderators have permission to perform the following actions:

- Invite participants
- Modify participant media connections
- Manually reposition participant images in a video layout
- Modify meeting view layouts
- Specify the position of a voice-activated image in the meeting view
- Create sub-conferences
- View additional participant details

Procedure

Step 1 Access the In-meeting Control interface.

(Meeting Operators) If no other user has control of the meeting at the same time, you are automatically granted Moderator control rights.

Step 2 (Meeting Organizers and regular users) Enter the moderator PIN if one is used for this meeting.

Step 3 Click the Take Control icon.

Accessing the In-meeting Control Interface

You moderate the status of a live meeting in real-time from the In-meeting Control interface. Access the In-meeting Control interface in any of the following ways.

Procedure

Step 1 Access the In-meeting Control interface via a user account.

If the meeting you want to control is listed at My Meetings > Current, and if you are the meeting organizer or an attendee of the meeting, click the meeting subject link.

Step 2 Access the In-meeting Control interface via a conference ID.

- When the meeting is in progress, click the URL link embedded in the meeting notification e-mail.

  –or–

- Click **Enter a Meeting** in the Resource Manager login screen and enter the conference ID and PIN to access the In-meeting Control screen.

The In-meeting Control Interface

The In-meeting Control interface contains the following components:

- Title bar—Positioned on the upper left-hand corner of the In-meeting Control screen, the title bar includes essential meeting information. Meeting control buttons are also available on the title bar for users with chair-control privileges. For more information, see Table 4-1 on page 4-2.
- Participant List tab—Enables you to view all meeting attendees and information about them. For more information, see Table 4-2 on page 4-4.
- Statistics tab—Enables you to view statistical information for all meeting attendees. This information in Statistics complements the information on the Participant List by providing additional attendee data. For more information, see Table 4-3 on page 4-5.
- Advanced Invitation tab—For users with chair-control privileges. Invite multiple predefined users or terminals to the meeting from this tab.
- Layout panel—Positioned in the upper-right hand corner of the In-meeting Control window, the Layout panel displays layout information related to meeting attendees, such as the position of each attendee in all available views. For users with chair-control privileges, layout control buttons are also available. For more information, see Table 4-4 on page 4-6.
- Invite panel—Positioned below the Layout panel. For users with chair-control rights. You can invite additional attendees to the current meeting. For more information, see Table 4-5 on page 4-7.

Table 4-1 Title Bar Details

Element Name	Sub-Element Name	Graphic/ Link	Requirements	Description
Meeting ID				The meeting ID attendees dial to join the meeting
Meeting Name				Name of the meeting

Table 4-1 Title Bar Details (continued)

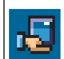
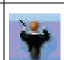
Element Name	Sub-Element Name	Graphic/ Link	Requirements	Description
Presentation				Indicates whether or not the conference is audio, video or data sharing via T.120
	Audio			
	Video			
	Data Sharing via T.120			
	H.239 Duo Streaming enabled			
MCU Conference				The corresponding MCU conference ID and the host MCU in the format Meeting:MCU_Conference_Id@ Host_MCU_Name
Bandwidth				Bandwidth of the MCU service used to create the meeting
Time Remaining				The length of time remaining for the meeting
Take Control				Click this button to take control of the meeting. Only one user can have control of a meeting at any one time
Help				Click this button to open the online help
Refresh				Click this button to manually refresh the In-meeting Control window **Note** The In-meeting Control window is automatically refreshed at regular intervals
Mute			Moderator control privileges	Mutes or un-mutes all meeting attendees
Terminate Meeting			Moderator control privileges	Terminates the meeting
Block Entry			Moderator control privileges	Prevents attendees from joining the conference via dial-in or dial-out
Reconnect All			Moderator control privileges	Dials out to all attendees to reconnect them

Table 4-1 Title Bar Details (continued)

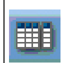
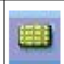
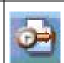
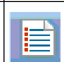
Element Name	Sub-Element Name	Graphic/ Link	Requirements	Description
Delete Participant			Moderator control privileges	Choose participants from Main Panel > Participant List, and then click this button to remove the chosen participants from the meeting.
Subconference			Moderator control privileges	Choose participants from Main Panel > Participant List, and then click this button to move the chosen participants to a sub-conference within the meeting.
Change View			Moderator control privileges	Choose participants from the Main Panel > Participant List, and then click this button to place them in one of the meeting's available views.
Extend Meeting			Moderator control privileges	Click this button to extend the duration of the current meeting.
Hierarchy			Moderator control privileges, cascaded meeting	Displays the participant list either in a tree view or table view.

Table 4-2 Participant List Tab Details

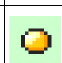
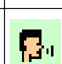
Element Name	Graphic/ Link	Requirements	Description
Connect/ Disconnect		Moderator control privileges	If a participant is connected, click this button to disconnect that participant. If a participant is disconnected, click this button to connect that participant.
Change Participant Name		Moderator control privileges	Located in the Participant Name column. Click this button to change the participant name in the conference and/or on terminals.
Name column			Column displays the names of the users and/or terminals attending the meeting.
Active Speaker			Indicates the user who is currently speaking in the meeting.
Number column			This column displays the number of the participating terminal.
Dial-in column			Indicates whether or not each participant dialed into the meeting.
Actual Speed column			Displays the connection speed (in/out) of each participant in Kbps.

Table 4-2 Participant List Tab Details (continued)

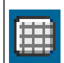
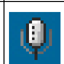
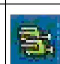
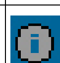
Element Name	Graphic/ Link	Requirements	Description
Sub-conf column			Indicates if a participant is part of a sub-conference of the meeting. This is only displayed for connected participants. For cascaded MCU conferences, only terminals in the master MCU conference have this field enabled.
Meeting View column			Indicates which view is currently displayed to each participant. This is only displayed for connected participants. For cascaded MCU conferences, only terminals in the master MCU conference have this field enabled.
Microphone Status			Click to adjust or mute the volume of a participant's audio output. This is only displayed for connected participants.
Loudspeaker Status			Indicates whether or not a participant is receiving audio. This is only displayed for connected participants.
Monitor Status			Indicates whether or not a participant is receiving video. This is only displayed for connected participants.
Camera Status			Click to enable or disable the video input of a participant. This is only displayed for connected participants.
Camera Status		Duo-streaming enabled	Click to enable or disable the video inputs of a participant. This icon appears instead of the Camera Status icon above if Duo-stream is enabled. This is only displayed for connected participants.
Participant Information column			Displays detailed call-related information of a meeting participant.
Tabular View			Only participating terminals are displayed in this view in a tabular format.
Tree View			In this view, participants are grouped according to the MCU to which they are connected. For each conference on the MCU, a header is displayed that indicates the group to which participants belong. Click the header to view the conference on the MCU.

Table 4-3 Statistics Tab Details

Column Heading	Description of Column Contents
Name	Name of each participant
Number	Number of each participating terminal
Actual Speed	Connection speed of each participant in Kbps
IP Address	IP address of each participant
Type	User type of each participant

Table 4-3 Statistics Tab Details (continued)

Column Heading	Description of Column Contents
Connect Time	The time that each participant connects to the meeting
Video In/Out	The codec used for video input video output
Audio In/Out	The codec used for audio input and audio output
Data	Indicates if there is data sharing
VFU Req. In/Out	Video Fast Update Request input and output
Video Out of Order Packets In/Out	Indicates if there are Video Out of Order packets
Video Lost Packets In/Out	Indicates if there is a lost video packet
Audio Out of Order Packets In/Out	Indicates if there are Audio Out of Order packets
Audio Lost Packets In/Out	Indicates if there are Audio Lost packets

Table 4-4 Layout Panel Details

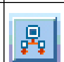
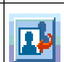
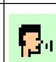
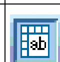
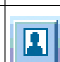
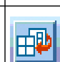
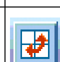
Element Name	Graphic	Requirements	Description
Layout Box			The layout displayed in the layout box is what the participant sees.
View tabs			Click a tab to display an available view. You can switch between views.
Video Output Stream		Moderator control privilege	Click to choose the bandwidth for each view. This is only available for MCU version 4.
Auto Switch		Moderator control privilege	Click to choose this layout mode that automatically switches participants at regular intervals.
Active Speaker		Moderator control privilege	Drag and drop the icon into a subframe in the Layout Box, to display the speaker in that subframe.
Text Overlay		Moderator control privilege	Click to enable the display of the terminal name as a text overlay displayed on a participating terminal.
No Self-See		Moderator control privilege	Click to toggle the self-see function.
Dynamic Layout		Moderator control privilege	Click to enable/disable dynamic layout. If dynamic layout is disabled, you can select a custom layout for the meeting by clicking Change Layout.
Change Layout		Moderator control privilege, dynamic layout must be disabled.	Click this icon to open a window containing all available layouts. Select one of the available layouts and it will be applied to the current layout displayed in the Layout panel.

Table 4-5 Invite Panel Details

Area	Description
Participant	Displays the number of participants currently connected to the meeting.
Reserved/Max	Displays the number of reserved ports for guest participants.
Invite	In this area, you can invite an IP/ISDN/Mobile participant to the meeting.

How to Moderate a Meeting

Moderators can control a meeting with various functions from the In-meeting Control interface.

Connecting or Disconnecting Participants

The Connect/Disconnect button toggles between its two functions. To connect or disconnect a participant, use the relevant procedure:

Procedure

Step 1 If a participant in the Participant List tab is listed as disconnected, click **Connect** to dial out to the terminal of that participant.

Step 2 If a participant in the Participant List tab is listed as connected, click **Disconnect** to disconnect the terminal of that participant.

Step 3 Click **Reconnect All** on the title bar to reconnect all participants to the current meeting.

Ad hoc participants (participants not on the original invited list) are removed from the meeting if they disconnect.

Changing the Meeting View for a Participant

While a meeting is in progress, you can change the meeting view for a single selected participant or for all participants simultaneously.

Procedure

Step 1 On the **Participant List** tab, select the participant for whom you want to change the view.

If you do not select a participant, the view changes for all participants.

Step 2 On the toolbar, click **Change view to all participants**.

Step 3 In the **Change participants view** window, from the **Change to view** list, select a view for the participant.

To select multiple participants, click the participants while holding down the Ctrl or Shift key.

Step 4 Click **OK**.

Inviting a Sub-conference

You can divert selected participants in the **Participant List** of the current conference to attend a new or currently running private audio sub-conference. Sub-conference participants are hidden in the video layout.

Procedure

Step 1 In the **Participant List** tab, select the participant(s) whom you wish to invite to a sub-conference.

Step 2 Click **Sub-conference** on the toolbar.

Step 3 In the Select sub-conference window, from the list, select a sub-conference you want to which you want to invite participants.

Step 4 Click **OK**.

A maximum of three sub-conferences can be supported per meeting. The number of supported sub-conferences depends on the meeting-type configuration.

Extending Meeting Duration

You can extend the meeting duration while a meeting is in progress.

Procedure

Step 1 Click **Extend Conference Duration** on the toolbar.

Step 2 In the **Extend** window, in the **Extend** field, enter the number of minutes by which you want to extend the duration of the meeting.

To select multiple participants, click the participants while holding down the Ctrl or Shift key.

Step 3 Click **OK**.

Terminating a Meeting

You can immediately terminate a meeting at any time.

Procedure

Step 1 Click **Terminate Meeting** on the toolbar.

Step 2 Click **OK**.

Defining Video Layout and Display

The Layout panel allows meeting controllers to spontaneously control and adjust all aspects of meeting video. When first accessed, this area displays the video layout as selected during meeting scheduling. From this view, the meeting controller can do the following:

Procedure

Step 1 Access the Layout panel

In Continuous Presence Mode, you can view which terminals are set for which video frames.

Step 2 To rearrange the video layout per terminal, drag-and-drop participating terminal names from the Participant List tab in the Main Panel into the desired frame.

Step 3 Set voice activated sub-frames.

Defining Video Output Schemes

This feature is only available for conferences occurring on Cisco MCU products running version 4.x software. When enabled, the video output schemes display up to four available video layouts. The system can produce up to four different video layouts per meeting to cater for participants with different video support capabilities, or different viewing purposes.

Multiple meeting views are configured per service with settings that specify video layout, layout switching and participant layout-switching behavior, picture resolution, bandwidth settings, frame rate, and video format.

Multiple meeting views enable the speaker in a lecture to view the participants while the participants view the speaker. In a meeting with varying connection speeds, participants with high video capabilities and participants with low video capabilities can take part at the same time without one affecting the experience of the other.

Procedure

Step 1 In the **Video Display** area, click **Output Scheme Settings**.

Step 2 In the **Video Scheme Settings** window, in the **Bandwidth** column, enter the bandwidth for each video scheme.

Step 3 Click **OK**.

Activating and Deactivating Auto-Switching

Auto-switching mode displays all the participants of a large meeting on a rotating basis when **Continuous Presence** mode is selected in the video layout. Participant images can be replaced at preset intervals either in batches or one by one by way of a queue system.

You can activate or deactivate auto-switching at any time.

Note Auto-switching overrides any existing video display options.

Procedure

Step 1 In the **Video Display** area, click **Auto-switch**.

Step 2 In the **Auto-switch interval** window, in the relevant field, enter an auto-switching interval value, between 10 and 108 000 seconds (30 minutes).

Step 3 Click **OK**.

Video from participating terminals (randomly selected) appears on all other terminals at the defined interval.

Step 4 To disable auto-switching, click **Auto-switch**.

Displaying a Participant or Terminal Name

You can display a participant or endpoint (terminal) name in a specific position within the video layout frame.

Resource Manager supports text overlay on participant images when there is EMP support and the text overlay option is configured for the meeting type.

Procedure

Step 1 Access the Video Display area.

Step 2 Click **Display Participant Name in Frame**.

Each participant or endpoint is clearly identified by name, in a text overlay on the video image.

The image of the active speaker is indicated by a border.

Setting a Voice-activated Frame

Available only for views for which a sub-frame is configured.

Procedure

Step 1 Access the Video Display area.

Step 2 Drag the **Active Speaker** button into the required position within the video layout frame.

Enabling and Disabling Dynamic Layout

Without a dynamic layout, you can switch between a wide range of video layouts for the meeting. With dynamic layout, the video image automatically includes the number of frames equal to the number of participant images (up to a maximum of 16). The layout changes according to the number of participants that join or exit the meeting.

Dynamic layout conserves bandwidth, eliminates the display of empty frames in the video image, and makes optimal use of the video image display. Dynamic layout is especially suited to a meeting that has a high rate of participant traffic joining and exiting the meeting, or to an adaptive meeting type that has a variety of meeting sizes.

Procedure

Step 1 Access the Video Display area.

Step 2 Click **Dynamic Layout** to enable a dynamic layout.

Step 3 Click **Dynamic Layout** again to disable the dynamic layout.

When Dynamic Layout is selected, Change Layout is disabled.

Changing Layout

With Dynamic Layout disabled, you can select a specific layout from a list of all available layouts in this MCU service and set that specific layout as the current layout for a view.

Procedure

Step 1 Access the Video Display area.

Step 2 Click **Change Layout**.

Step 3 In the Select Layout window, select a layout from the options in the Select Layout window.

Step 4 Drag and drop the option in the selected layout area in the Video Display area.

Inviting Multiple Participants

To invite multiple participants to a meeting, simultaneously, use the following procedure:

Procedure

Step 1 On the **Advanced Invitation** tab, click **User**.

Step 2 Select the attendees to invite from the **Users: in Groups** list.

If required, you can search for users by entering the full name or part thereof in the search field, and clicking the search icon.

Step 3 Click the right arrow to include these users in the list to be invited.

Step 4 In the **Kbps** field, select the bit rate to be used when inviting a participant to a meeting. Use the default setting for optimal bit rate performance.

Step 5 If required, click **Advanced** and then select a layout option from the **view** list.

Your selection presets the position of the invited participant image in the video layout upon the participant's entry into the meeting.

Step 6 Drag the **Lock Image** icon into the preferred position in the **Layout Display Frame** displayed on the right side of the **Advanced Invitation** tab.

You can specify a position for the participant image in all layouts currently supported in the meeting.

Step 7 To send the invitation, click **Invite**.

Inviting Multiple Terminals

Use the following procedure to invite multiple terminals to a meeting:

Procedure

Step 1 On the **Advanced Invitation** tab, click **Terminal**.

Step 2 Select the terminals to include in the meeting.

If required, you can search for terminals by entering the full name or part thereof in the search field, and clicking the search icon.

Step 3 To include the selected terminals in the list of invited terminals, click the right-pointing arrow.

Step 4 In the **Kbps** field, select the bit rate to be used when inviting a terminal to a meeting.

Use the default setting for optimal bit rate performance.

Step 5 If required, click **Advanced** and then select a layout option from the **view** list.

This presets the position of the invited terminal image in the video layout, upon entry of a participant into the meeting.

Step 6 Drag the **Lock Image** icon into the preferred position in the **Layout Display Frame** located on the right side of the **Advanced Invitation** tab.

You can specify a position for the participant image in all layouts currently supported in the meeting.

Step 7 To send the invitation, click **Invite**.

Viewing Participant Details

On the Participant List tab, all participants currently invited to a meeting are listed. The Participant List tab enables you to view meeting participant details including media connection types and available video layouts for the meeting. You can view the details in an alphabetical list or according to cascaded connections.

The following information about each participant or terminal is included

- Status—Indicates participant status.

  To sort by status, click the column heading.
- Orange status indicates the participant is connecting.
- Green status indicates that the participant is connected.
- Red—Participant is disconnected.

  Disconnected participants remain in the Participant List for the duration of the meeting.

  To reconnect a disconnected participant, click the red status icon.
- No status indicator indicates that there are no meeting participants.
- Name—Displays the participant name.
- Number—Displays the endpoint number of the meeting participant.
- Dial-in—Indicates whether the terminal dialed into the meeting or was invited to the meeting from the Conference Control screen.
- Sub-conf.—Diverts selected participants in the current meeting to a new meeting or to a private audio meeting that is currently in progress. This option only appears when sub-conferences are in progress during a meeting. For more information, see the "Inviting a Sub-conference" section on page 4-9.
- Location in View—Indicates the meeting view being used for a current participant. When a meeting is configured with more than one view, select from the list of available views to modify a view for the selected participant.
- Media Icons—Indicate participant equipment and capacities, such as microphone, loudspeaker, monitor, camera, and data collaboration. The icons are enabled for users with chair-control permission related to the media type status for a selected participant.

Changing a Participant Name

Procedure

Step 1 Click **Participant List**.

Step 2 Click the **Change Participant Name** icon located next to the name of the participant to open a popup window.

Step 3 Enter a new name for that participant in the popup window.

If the participant is online, the new name is displayed on the video screen for that participant.

Muting or Enabling a Selected Microphone

This option is useful in cases when there is unwanted background noise related to a specific participant or terminal.

Procedure

Step 1 Click **Participant List**.

Step 2 Click the **Mic. Enabled** icon next to the required participant name.

Step 3 Alternatively, change the volume of that participant by right clicking the triangle next to the microphone icon to open a popup screen.

Step 4 In the popup screen, set the volume to be between -5 to +5.

Muting or Enabling a Selected Loudspeaker

Procedure

Step 1 Click **Participant List**.

Step 2 To mute or enable a specific participant loudspeaker, click the **Loudspeaker Enabled** icon next to the required participant name.

Enabling a Selected Monitor

Procedure

Step 1 Click **Participant List**.

Step 2 Click the **Monitor Enabled** icon next to the required participant name.

Blocking or Unblocking a Selected Camera

You can block or unblock a video stream sent by a meeting participant. For example, if a participant's video connection affects meeting processing and degrades performance, you can block the participant's video connection until endpoint issues are resolved.

Procedure

Step 1 Click **Participant List**.

Step 2 Click the **Camera Enabled** icon next to the required participant name.

Enabling Data Collaboration

You can enable data collaboration if the terminal of the participant supports T.120 data sharing.

Procedure

Step 1 Click **Participant List**.

Step 2 Click the **Data Collaboration Enabled** icon next to the required participant name.

Removing a Participant from the Participant List

Procedure

Step 1 Click **Participant List**.

Step 2 Select the participant(s) you want to disconnect and remove from the list.

Step 3 Click **Delete Participant** on the toolbar.

The participant(s) are disconnected from the meeting and removed from the list.

CHAPTER 5

Managing Your Resource Manager Address Book

The address book facility allows you to store a list of personal and organization contacts that you can quickly retrieve when scheduling meetings. Only you can view your personal contacts. All organization users can view your organization contacts.

You can also define contact groups to divide users into groups for easier management and quicker access.

- How to Manage Your Personal Contacts List, page 5-1
- How to Manage Your Organization Contacts List, page 5-3
- How to Manage Contact Groups, page 5-4

How to Manage Your Personal Contacts List

- Creating or Modifying a Personal Contact, page 5-1
- Removing a Personal Contact, page 5-3
- Searching for a Personal Contact, page 5-3

Creating or Modifying a Personal Contact

The Address Book section is hidden by default. If you cannot see this section, contact your system administrator.

Procedure

Step 1 Click **Address Book** in the sidebar menu.

Step 2 Click **Private**.

Step 3 Click the link in the Name column for the contact you require, or click **Add** to create a new contact profile.

Step 4 Enter the first name, last name and e-mail address of the contact in the relevant fields.

If you provide a phone number for the contact, you do not have to enter an e-mail address in the E-mail field.

Step 5 Select a terminal type used by the contact.

Available fields and options vary according to terminal type.

Step 6 If you select the IP (H.323) terminal type:

- Enter the E.164 number or IP address of the new terminal in the **IP Phone Number** field.
- Select the maximum speed for the terminal connection to the network for video meeting in the **Bandwidth** field.

Step 7 If you select the PSTN/ISDN terminal type:

- Enter the international access code for the ISDN terminal in the **Country Code** field.
- Enter the local area code of the ISDN terminal in the **Area Code** field. If the local area code begins with 0, do not include the 0 in the area code.
- Enter an ISDN phone number in the **Number** field.
- Select the maximum speed for the terminal connection to the network for video meeting in the **Bandwidth** field.
- Select **Restricted Mode** to apply the convention of using multiples of 56 Kbps instead of multiples of 64 Kbps.

Step 8 If you select the Dual (H.320 and H.323) terminal type:

- Enter the E.164 number or IP address of the new terminal in the **IP Phone Number** field.
- Enter the international access code for the ISDN terminal in the **Country Code** field.
- Enter the local area code of the ISDN terminal in the **Area Code** field. If the local area code begins with 0, do not include the 0 in the area code.
- Enter an ISDN phone number in the **Number** field.
- Select the maximum speed for the IP terminal connection to the network for video meeting in the **IP Bandwidth** field.
- Select the maximum speed for the ISDN terminal connection to the network for video meeting in the **ISDN Bandwidth** field.
- Select **Restricted Mode** to apply the convention of using multiples of 56 Kbps instead of multiples of 64 Kbps.

Step 9 If you select the IP (SIP) terminal type, provide the following information:

- Enter a SIP URI for the user.
- Select the maximum speed for the terminal connection to the network for video meeting in the **Bandwidth** field.

Step 10 Click **Group** to associate a contact with a group defined under Address Book > My Groups.

Step 11 Click **Select Groups** and use the arrow buttons to move entries between the Available Groups and Selected Groups lists.

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

The contact appears in the relevant group list and is added to your personal address book.

Removing a Personal Contact

Procedure

Step 1 Click **Address Book** in the sidebar menu.

Step 2 Click **Private**.

Step 3 Select the check box next to the name of the contact you want to delete.

Step 4 Click **Delete** and then **OK**.

The contact is permanently deleted from your address book.

Searching for a Personal Contact

Procedure

Step 1 Click **Address Book** in the sidebar menu.

Step 2 Click **Private**.

Step 3 Enter the partial or complete name of the contact in the **Name** field.

Step 4 From the **In Groups** list, select **All Groups** or a group in which to search for the contact.

The groups displayed in this list are defined at Address Book > My Groups.

Step 5 Click **Search**.

Search results are listed.

Step 6 To return to the complete list of contacts, clear the Name field, and then click **Search**.

How to Manage Your Organization Contacts List

- Viewing All Users in Your Organization, page 5-3
- Searching for a Contact in Your Organization, page 5-4
- Adding an Organization Contact to your Personal Address Book, page 5-4

Viewing All Users in Your Organization

Procedure

Step 1 Click **Address Book** in the sidebar menu.

Step 2 Click **Public**.

Searching for a Contact in Your Organization

Procedure

Step 1 Click **Address Book** in the sidebar menu.

Step 2 Click **Public**.

Step 3 Enter the partial or complete name of the contact in the **Name** field.

Step 4 From the **In Groups** list, select **All Groups** or a group in which to search for the contact.

Step 5 Click **Search**.

Search results are listed.

Step 6 To return to the complete list of contacts, clear the Name field, and then click **Search**.

Adding an Organization Contact to your Personal Address Book

You cannot edit a public contact record. You can add a public contact to your personal address book.

Procedure

Step 1 Click **Address Book** in the sidebar menu.

Step 2 Click **Public**.

Step 3 Select the check box next to the name of the contact you want to add to your personal address book.

Step 4 Click **Add to Private**.

The **Private** tab opens and the contact appears in the list.

How to Manage Contact Groups

- Creating or Modifying a Group, page 5-4
- Removing a Group, page 5-5
- Searching for a Group, page 5-5

Creating or Modifying a Group

Procedure

Step 1 Click **Address Book** in the sidebar menu.

Step 2 Click **My Groups**.

Step 3 Click the link in the Name column for the group you require, or click **Add** to create a new contact profile.

Step 4 Enter a name for the group and use the arrow buttons to move entries between the Available Contacts and Selected Contacts lists.

Step 5 Click **OK**.

The group appears in the My Groups tab. All selected contacts are included in the group.

The In Groups list on the Private and Public tabs includes the new group.

Removing a Group

Procedure

Step 1 Click **Address Book** in the sidebar menu.

Step 2 Click **My Groups**.

Step 3 Select the check box next to the name of the group you want to delete.

Step 4 Click **Delete** and then **OK**.

The group is permanently deleted from your address book.

Searching for a Group

Procedure

Step 1 Click **Address Book** in the sidebar menu.

Step 2 Click **My Groups**.

Step 3 Enter the partial or complete name of the group in the **Name** field.

Step 4 Click **Search**.

Search results are listed.

Step 5 To return to the complete list of groups, clear the Name field, and then click **Search**.

CHAPTER 6

Managing Your Resource Manager User Profile

Viewing Your User Profile Settings

Procedure

Step 1 Click **My Profile** in the sidebar menu.

Step 2 Click **My Info**.

Step 3 Click **Advanced** to display further information.

Modifying Your Password

If your profile settings are stored on an external directory server, you cannot modify your password.

Procedure

Step 1 Click **My Profile** in the sidebar menu.

Step 2 Click **My Info**.

Step 3 Click **Modify Password**.

Step 4 Complete the information as required and click **OK** to save your changes.

Modifying Your E-mail Address

If your profile settings are stored on an external directory server, you cannot modify your e-mail address.

Procedure

Step 1 Click **My Profile** in the sidebar menu.

Step 2 Click **My Info**.

Step 3 Modify your e-mail address as required.

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

Modifying Your Time Zone

Procedure

Step 1 Click **My Profile** in the sidebar menu.

Step 2 Click **My Info**.

Step 3 Click **Advanced**.

Step 4 Select the required time zone.

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

Defining Your Meeting Display Preferences

Procedure

Step 1 Click **My Profile** in the sidebar menu.

Step 2 Click **My Preferences**.

Step 3 Select **Don't include me in the meeting** if you do not want to be automatically included in the Selected Participants list on the Invite tab when you schedule a new meeting.

Step 4 Enter a value in **Delete meeting history items older than n days** to delete meetings from My Meetings > History after the specified number of days.

Step 5 Select **Use Full Screen Display** to display meetings without a menu or title bar in your browser.

Deselect to display meetings using default browser settings.

Step 6 Select an option from the **Name Display Format** list to change the way your name is displayed in meeting-related information and in the meeting video display.

Step 7 Select **Last name** or **First name** from the **Sort by** list to change the sort order for participant name columns in the User interface.

Step 8 Select an option from the **Date Display Format** list to change the way dates are displayed in the User interface.

Step 9 Click **OK** to save your changes.

Defining Your Virtual Room Preferences

Procedure

Step 1 Click **My Profile** in the sidebar menu.

Step 2 Click **My Info**.

Step 3 Click **Virtual Room Setting**.

Meeting Operators can define multiple virtual rooms.

Meeting Organizers can define only one virtual room and can configure only basic information such as meeting type and conference PIN.

Step 4 Enter a virtual room number and name in the relevant fields.

The virtual room and should be unique in the system.

The virtual room number is generated automatically and is not editable if the administrator has downloaded user profile information from the LDAP server.

Step 5 Select a meeting type.

A meeting type is required to schedule a meeting.

A default meeting type is set by your system administrator.

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

Step 6 (Optional) Define the meeting access PIN in the **Conference PIN** field.

Only integers are allowed. This PIN allows you to join a PIN-protected meeting.

Step 7 (Optional) Define the PIN that allows a user to perform moderation operations on a meeting in the **Moderator PIN** field.

Only integers are allowed. This PIN allows you to take control of a meeting from the In-meeting Control interface or from the endpoint using DTMF. Administrators and Meeting Operators can access the In-meeting Control screen without using the Moderator PIN.

Step 8 If the Moderator PIN is provided by the meeting scheduler, the meeting scheduler can optionally turn on the waiting room functionality by checking **Place participants in a 'waiting room' until the moderator joins the meeting**.

Before the host joins the meeting, all connected participants are put into waiting room mode where they cannot hear or see one another. When the host terminal joins the meeting, the waiting room mode is removed and all participants can see and hear each other.

You can unlock the waiting room mode by taking control of the In-meeting Control screen after entering the moderator PIN and clicking **Unlock waiting room**. For more information, see Chapter 4, "Moderating Meetings in Resource Manager".

Step 9 For meetings enabled for Cisco Unified Videoconferencing Desktop attendance, you can specify whether the meeting will allow streaming by selecting the default streaming mode.

The default streaming mode determines the initial streaming state. Streaming can be disabled or enabled during the meeting by any Cisco Unified Videoconferencing Desktop Client that has meeting moderation rights.

By default, the Default Streaming Mode field is disabled and hidden from the user interface. If you need this field enabled, contact your system administrator.

Step 10 (Optional) Enter a description of the scheduled meeting for future reference.

The Description field is hidden by default. If you need this field displayed, contact your system administrator.

CHAPTER 7

Scheduling Meetings via Resource Manager Outlook Client

The Resource Manager Outlook Client for Cisco Unified Videoconferencing Manager is a separately installed plug-in that allows users to schedule a meeting via the Microsoft Outlook appointment form interface rather than in the Resource Manager web interface.

Restrictions for Resource Manager Outlook Client

- A meeting scheduled in Microsoft Outlook can only be modified in the Microsoft Outlook interface.
- Once a meeting is scheduled, you cannot modify its recurrence pattern. To modify the recurrence pattern, delete the recurring meeting, and then schedule a new recurring meeting. Modification of the recurrence pattern includes changing parameters of the recurrence:
- Interval (weekly, monthly, or yearly)
- Number of recurrences
- Start and/or end date

How to Schedule Meetings with the Resource Manager Outlook Client

Accessing the Resource Manager Outlook Client from within Outlook

Procedure

Step 1 Open the calendar in Microsoft Outlook.

Step 2 Click the icon in the Microsoft Outlook Calendar toolbar or schedule a meeting as you usually would in Microsoft Outlook, to open a new appointment.

Step 3 Click **New** to open a new meeting, if the add-on appointment form is configured as the default form

–or–

Step 4 Click the product icon in the Microsoft Outlook Calendar toolbar, if the add-on appointment form is not configured as the default form.

The Appointment form contains the following tabs:

- Appointment—Same as the default Appointment tab in Microsoft Outlook. Text entered in the Appointment tab is displayed in the Description field of the meeting notification e-mail.
- Rich Media—Enables scheduling of an audio or video meeting.
- Scheduling—Same as the default Scheduling tab in Microsoft Outlook.

Defining Meeting Resources in the Resource Manager Outlook Client

After inviting meeting participants on the Appointment tab, you can specify audio and/or video meeting resources on the Rich Media tab for the meeting you are scheduling.

Procedure

Step 1 Select **This is an online rich media meeting** to activate the Rich Media tab.

Step 2 Select a meeting type for the meeting.

Step 3 A meeting ID is automatically generated.

You can overwrite the default meeting ID.

Step 4 Type the Moderator PIN and Conference PIN if they exist. Only numbers are accepted.

If the Moderator PIN is provided by the meeting scheduler, the meeting scheduler can optionally turn on waiting room functionality by checking **Place participants in a "waiting room" until the moderator joins the meeting**.

Before the host joins, all connected participants are put into waiting room mode where they cannot hear or see each other. You can unlock the waiting room by taking control of the In-meeting Control interface after entering the moderator PIN and clicking **Unlock waiting room**.

Step 5 Select the **Default Streaming Mode** value if it is displayed.

These are the same fields as at **User > Meeting Scheduling > Basic**.

Step 6 A list of meeting attendees and their associated terminals are displayed in the **Attendees** table. These attendees are the people that you invited on the **Appointment** tab.

Step 7 Click the link in the Terminal column to customize the terminal associated with each attendee.

Step 8 Check the check box under the PSTN/ISDN column select to use a dual type terminal as a PSTN/ISDN endpoint.

Step 9 Check the check box under the Dial In column to specify whether a terminal should dial into the meeting.

Step 10 Specify the required number of reserved ports in the **Reserved additional ports** field.

You can also define the bandwidth for these reserved ports.

Step 11 Click **Send** to schedule a new meeting, or click **Send Update** to modify an existing meeting.

If network resources and required resources are available, the meeting is automatically scheduled and a notification is sent to all participants, along with a request for a response to the meeting invitation.

If network or other required resources are not available, an unable-to-schedule message appears, along with a reason for the scheduling failure. E-mail notifications are not sent to meeting invitees.

Responding to a Meeting Invitation

Every invitee to an appointment created with the Resource Manager Outlook Client should receive an e-mail notification that lists meeting details, invited participants, and a request for confirmation of participation.

Responding to a meeting invitation updates the meeting information in Resource Manager.

Procedure

Step 1 Either click a meeting name under **My Meetings** > **Upcoming** to open the Meeting Details window, then click **Accept**, **Tentative**, or **Decline**,

–or–

Step 2 In the e-mail notification, click **Accept**, **Tentative**, or **Decline**.

If a user does not respond to a meeting invitation sent from Resource Manager Outlook Client, a red flag appears in User > My Meetings > Upcoming Meetings for that specific user.

The server is not updated and the terminal is not called at the time of the meeting.

If the user responds, the flag does not appear.

Invitees who decline an invitation are no longer part of the meeting.

How to Troubleshoot the Resource Manager Outlook Client

If the Rich Media tab does not appear when making a new appointment, or the Cisco Unified Videoconferencing Manager tab does not appear under Tools > Options, perform the following steps:

- Troubleshooting the Resource Manager Outlook Client under Outlook 2003 and XP, page 7-4
- Troubleshooting the Resource Manager Outlook Client under Outlook 2003 SP3 and 2007, page 7-4

Troubleshooting the Resource Manager Outlook Client under Outlook 2003 and XP

Procedure

Step 1 In the Microsoft Outlook user interface, go to **Tools** > **Options** > **Other**.

Step 2 Click **Advanced Options**.

Step 3 In the **Advanced Options** windows, click **COM Add-Ins**.

Step 4 If there is an entry named Resource Manager Outlook Integration, remove it first.

Step 5 Click **Add**.

Step 6 Select the VCSOutInt.dll file under the default Resource Manager Outlook Client installation directory.

The default installation directory for the Resource Manager Outlook Client is C:\Program Files\Cisco\iCM Outlook AddonCUVCM RM Outlook AddonAeDS Outlook Addon.

Step 7 Restart Microsoft Outlook.

Troubleshooting the Resource Manager Outlook Client under Outlook 2003 SP3 and 2007

Procedure

Step 1 In the Microsoft Outlook user interface, go to **Help** > **Disabled Items**.

Step 2 If there is an entry named Resource Manager Outlook Client, select it.

Step 3 Click **Enable**

Step 4 Restart Microsoft Outlook.

Restarting Outlook

Any fresh installation of Resource Manager Outlook Client requires a restart of Outlook to take effect. Sometimes, closing Outlook does not necessarily shut off the Outlook process. To ensure that Outlook is indeed shut off, perform the following steps:

Procedure

Step 1 Open the Task Manager and look for the Outlook process.

Step 2 If the Outlook process is still running even though Outlook has been closed, manually terminate the Outlook process.

The next time you open Outlook, the Resource Manager Outlook Client appears.

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