



Enabling Cisco Unified MeetingPlace Scheduling from Microsoft Outlook

Release 7.1

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This section describes how to enable users to schedule, reschedule, and cancel meetings from the Microsoft Outlook calendar. This Microsoft Outlook integration option is often referred to as the *front-end* deployment. When users accept an invitation, the meeting information and a click-to-attend link become available from their Microsoft Outlook calendar. The meeting scheduler receives Microsoft Outlook replies that indicate which attendees accepted or declined the invitation.



Note

This document does *not* describe how to enable Cisco Unified MeetingPlace to send Microsoft Outlook calendar notifications for meetings that are scheduled from the Cisco Unified MeetingPlace end-user web interface. That Microsoft Outlook integration option is often referred to as the *back-end* deployment. See the following for information about the back-end deployment:

- [Enabling Microsoft Outlook Calendar Notifications for Meetings Scheduled from the Cisco Unified MeetingPlace End-User Web Interface](#) module

Topics in this section include:

- [Prerequisites for Scheduling From Microsoft Outlook](#), page 1
- [Restrictions for Scheduling From Microsoft Outlook](#), page 2
- [How to Enable Scheduling From Microsoft Outlook](#), page 3
- [Customization Options for Scheduling from Microsoft Outlook](#), page 11
- [About the Cisco Unified MeetingPlace Plug-in and Different Versions of Microsoft Outlook](#), page 11

Prerequisites for Scheduling From Microsoft Outlook

- Install the msft_int license.
- Configure a Cisco Unified MeetingPlace user profile for each user who will schedule Cisco Unified MeetingPlace meetings from Microsoft Outlook.

If you plan to use the [Single Sign-On](#) default authentication method, then the Cisco Unified MeetingPlace [User ID](#) must match the Microsoft Outlook username.

- Enable Secure Sockets Layer (SSL) on the Application Server.
 - SSL is required only to use the [Single Sign-On](#) user authentication method for Microsoft Outlook integration.
- In order for end users to receive complete and correct Cisco Unified MeetingPlace notifications in Microsoft Outlook, the e-mail accounts set up in the Microsoft Outlook client must be configured to use the Server Type option called “Microsoft Exchange Server.” Cisco Unified MeetingPlace for Microsoft Outlook does *not* support other server types, such as POP3.
- In order for a Microsoft Outlook delegate to schedule Cisco Unified MeetingPlace meetings on behalf of other users, the delegate must have the “Editor” level of delegate access permissions.
- The delegate and delegator must have identical scheduling privileges in their Cisco Unified MeetingPlace profiles in order for the delegate to properly schedule MeetingPlace meetings from Microsoft Outlook.



Note Microsoft Outlook delegates are completely separate from Cisco Unified MeetingPlace delegates. The [Type of user](#) and [User ID of delegate](#) fields in Cisco Unified MeetingPlace user profiles do not affect the privileges and capabilities of Microsoft Outlook delegates.

Related Topics

- [Installing and Managing Licenses for Cisco Unified MeetingPlace](#) module
- [Configuring User Profiles and User Groups for Cisco Unified MeetingPlace](#) module
- [Configuring SSL for the Cisco Unified MeetingPlace Application Server](#) module

Restrictions for Scheduling From Microsoft Outlook

- Invitees always receive Microsoft Outlook calendar notifications in the [Language](#) that is specified in the Cisco Unified MeetingPlace user profile of the meeting owner.
- If meetings scheduled through Microsoft Outlook are modified through the Cisco Unified MeetingPlace end-user web interface (by anyone, regardless of user type):
 - E-mail notifications are *not* sent for those changes.
 - The Microsoft Outlook calendar of the meeting owner and invitees will not reflect those changes.
- Users of type [End user](#) and [Delegate](#) can make only limited changes via the Cisco Unified MeetingPlace end-user web interface to meetings that were scheduled from Microsoft Outlook. Specifically, these users can only make changes that cannot be made from Microsoft Outlook, such as specifying alternate hosts for Cisco WebEx meetings.

Users of type [Attendant](#) and [System administrator](#) can make the same changes as end users and delegates, but they can also delete meetings from the Cisco Unified MeetingPlace end-user web interface.

- We do not support multiple Microsoft Outlook users in a single Microsoft Windows login session. The username that was entered to sign in to Microsoft Windows must match the Microsoft Outlook username, which is typically the mailbox name for the user.

- Users are invited from the Microsoft Outlook directory and cannot be invited by Cisco Unified MeetingPlace profile. Cisco Unified MeetingPlace does, however, populate the meeting participant list using the user profiles with e-mail addresses that match those in the Microsoft Outlook meeting invitation.
- Meeting schedulers may invite a video terminal from the Microsoft Outlook calendar only if the [Requirements for Inviting Video Terminal Profiles from Microsoft Outlook](#) are met.
- Only one email notification template, plain-text NotifySchedule.tpl, is used for the Microsoft Outlook calendar notifications. HTML-based notifications are not supported when scheduling meetings from the Microsoft Outlook client.
- Delegates are not supported when you enable Single Sign-On (SSO) based on Windows Active Directory credentials.
- Cisco Unified MeetingPlace for Microsoft Outlook Release 7.1 does not support SSO using Windows Active Directory with Microsoft Outlook 2003. If you attempt to choose SSO using Windows Active Directory, the system will default to the Remember Me authentication method instead. Release 7.1 does support SSO using Microsoft Exchange with Microsoft Outlook 2003.
- Meetings that are scheduled while SSL is enabled must be rescheduled with SSL enabled. The system does not support the rescheduling of SSL-enabled meetings when SSL is disabled.

Related Topics

- [Requirements for Inviting Video Terminal Profiles from Microsoft Outlook](#) in the [Configuring Endpoints for Cisco Unified MeetingPlace](#) module
- [How to Configure Video Terminal Profiles](#) in the [Configuring Endpoints for Cisco Unified MeetingPlace](#) module

How to Enable Scheduling From Microsoft Outlook

- [About Default Authentication Methods for Microsoft Outlook Users](#), page 3
- [Configuring the Default Authentication Method for Microsoft Outlook Users](#), page 5
- [Adding Cisco Unified MeetingPlace Systems to the Plug-In for Microsoft Outlook](#), page 6
- [How to Install the Cisco Unified MeetingPlace Plug-In for Microsoft Outlook](#), page 7
- [Customizing the Cisco Unified MeetingPlace Scheduling Form for Microsoft Outlook](#), page 10

About Default Authentication Methods for Microsoft Outlook Users

The front-end Microsoft Outlook integration provides two default user authentication methods:

- [Remember Me](#), page 3
- [Single Sign-On](#), page 4

Remember Me

If you choose the Remember Me default user authentication method:

- Users must enable the use of cookies on their browsers.

- The first time a user tries to schedule a Cisco Unified MeetingPlace meeting from Microsoft Outlook, the user is prompted to sign in to Cisco Unified MeetingPlace.
- If cookies are enabled on the browser, then the user can select the Remember Me option. The stored cookies are then used for future authentication, so the user does not need to sign in each time the user selects the MeetingPlace tab.
- If the [User password](#) expires, the user is prompted to sign in to Cisco Unified MeetingPlace and change the password. The user can again select the Remember Me option.

Related Topics

- [Configuring the Default Authentication Method for Microsoft Outlook Users, page 5](#)

Single Sign-On

If you choose a Single Sign-On default user authentication method, users are not prompted to sign in to Cisco Unified MeetingPlace from Microsoft Outlook after successfully signing in to Microsoft Exchange or to the Windows Active Directory domain.



Note

- Delegates are not supported when you enable Single Sign-On (SSO) based on Windows Active Directory credentials.
- Cisco Unified MeetingPlace for Microsoft Outlook Release 7.1 does not support SSO using Windows Active Directory with Microsoft Outlook 2003. If you attempt to choose SSO using Windows Active Directory, the system will default to the Remember Me authentication method instead. Release 7.1 does support SSO using Microsoft Exchange with Microsoft Outlook 2003.
- The Cisco Unified MeetingPlace database contains lower-case versions of user IDs. Make sure that any user IDs you enter or retrieve from Windows Active Directory or Microsoft Exchange are in lower-case before comparing them with user IDs in the Cisco Unified MeetingPlace database.

Requirements for Single Sign-On Authentication:

- If authenticating through Microsoft Exchange, the user must be able to successfully sign in to Microsoft Exchange when the Microsoft Outlook client launches.
- The Microsoft Exchange User ID must match a [User ID](#) in Cisco Unified MeetingPlace.
- In a workgroup environment, the domain portion of the user email address (that is, the part after @) must match a configured [Outlook Single Sign-On Domain](#) in Cisco Unified MeetingPlace.

For example, from the email address userA@example.com, you would configure “example.com” as a domain in Cisco Unified MeetingPlace.

In a domain environment, the following requirements apply:

- If authenticating through Windows Active Directory, the user must be able to successfully sign in to the Windows Active Directory domain when he signs in to his computer.
- The domain of the client machine must match a configured [Outlook Single Sign-On Domain](#) in Cisco Unified MeetingPlace.

Note that the client machine domain may differ from the user domain. For example, a user PC may be in domainA.example.com, while the user account is domainBusername. You would configure “domainA” in Cisco Unified MeetingPlace.

- Each Cisco Unified MeetingPlace user must have a unique username in Microsoft Outlook and Microsoft Exchange that is the same across the entire organization in Active Directory.

For example, suppose that Cisco Unified MeetingPlace user “userA” is associated with two different domains, domain1.example.com and domain2.example.com, both of which you configured in Cisco Unified MeetingPlace. The Single Sign-On authentication method assumes that userA@domain1.example.com and userA@domain2.example.com refer to the same “userA” user profile in Cisco Unified MeetingPlace.

Related Topics

- [Configuring the Default Authentication Method for Microsoft Outlook Users, page 5](#)

Configuring the Default Authentication Method for Microsoft Outlook Users

By default, the system uses the [Remember Me](#) authentication method. If the configured default authentication method fails, the user is prompted to enter the Cisco Unified MeetingPlace User ID and User password after selecting the MeetingPlace tab in Microsoft Outlook.

Before You Begin

- Complete the “[Prerequisites for Scheduling From Microsoft Outlook](#)” section on page 1.
- Read the “[Restrictions for Scheduling From Microsoft Outlook](#)” section on page 2.
- Read the “[About Default Authentication Methods for Microsoft Outlook Users](#)” section on page 3.
- If configuring Single Sign-On authentication, make sure that SSL is enabled.

Procedure

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- Step 1** Sign in to the Cisco Unified MeetingPlace Administration Center.
 - Step 2** Select **System Configuration > Outlook Authentication Configuration**.
 - Step 3** Select a default authentication method.
 - Step 4** If you selected **Single sign-on using Exchange** or **Single sign-on using Active Directory**, configure the domains of the Microsoft Outlook users:
 - a. Click **Add New**, or click an existing entry.
 - b. Enter the domain in the [Outlook Single Sign-On Domain](#) field.
 - c. Click **Save**.
 - d. Repeat [Step 4](#) as needed to configure all domains that are used by your Cisco Unified MeetingPlace for Microsoft Outlook users.
 - Step 5** Click **Save**.
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What to Do Next

- If you want to make multiple Cisco Unified MeetingPlace systems available for meetings scheduled from Microsoft Outlook, proceed to the “[Adding Cisco Unified MeetingPlace Systems to the Plug-In for Microsoft Outlook](#)” section on page 6.
- Otherwise, proceed to the “[How to Install the Cisco Unified MeetingPlace Plug-In for Microsoft Outlook](#)” section on page 7.

Related Topics

- [Outlook Authentication Configuration Page](#) in the [Administration Center Page References for Cisco Unified MeetingPlace](#) module

Adding Cisco Unified MeetingPlace Systems to the Plug-In for Microsoft Outlook

The Cisco Unified MeetingPlace plug-in for Microsoft Outlook enables end users to click a tab within the Microsoft Outlook calendar to access a Cisco Unified MeetingPlace scheduling form. The plug-in comes preconfigured with system information that was entered while installing Cisco Unified MeetingPlace on the Application Server. You can, however, perform this task to enable each user to use one calendar to schedule and manage meetings on multiple Cisco Unified MeetingPlace systems.

When multiple Cisco Unified MeetingPlace systems are available, the user may specify which system to use by default from Microsoft Outlook as follows:

For This Microsoft Outlook Version	Do This
Microsoft Outlook 2003	Click Tools > Options and select the MeetingPlace tab.
Microsoft Outlook 2007 and 2010	Open the calendar, click the down arrow on the MeetingPlace button and select Settings .

Before You Begin

- Perform this task only if you want to make multiple Cisco Unified MeetingPlace systems available for meetings scheduled from Microsoft Outlook.
- Complete the [“Prerequisites for Scheduling From Microsoft Outlook”](#) section on page 1.
- Read the [“Restrictions for Scheduling From Microsoft Outlook”](#) section on page 2.

Procedure

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- Step 1** Sign in to the Cisco Unified MeetingPlace Administration Center.
- Step 2** Select **System Configuration > Outlook Plug-In Configuration**.
- Step 3** Click **Add New**, or click an existing entry.
- Step 4** Enter the [Name](#) and [URL](#) for the Application Server of the Cisco Unified MeetingPlace system.
- Step 5** Click **Save**.
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What to Do Next

Proceed to the [“How to Install the Cisco Unified MeetingPlace Plug-In for Microsoft Outlook”](#) section on page 7.

Related Topics

- [Field Reference: Outlook Plug-In Configuration Page, Add Cisco Unified MeetingPlace Server Page, and Edit Cisco Unified MeetingPlace Server Page](#) in the [Administration Center Page References for Cisco Unified MeetingPlace](#) module

How to Install the Cisco Unified MeetingPlace Plug-In for Microsoft Outlook

You can install the Cisco Unified MeetingPlace plug-in for Microsoft Outlook by using a setup.exe file or an MSI file. Both setup.exe and MSI detects which Microsoft Outlook version is installed on your computer and installs the appropriate plug-in.

Make sure that you choose one deployment model (.exe file or MSI file) for both initial installation and upgrades. If you choose the MSI deployment model, make sure that you “push” the new MSI file after each Application Server upgrade.

**Note**

Cisco Unified MeetingPlace for Microsoft Outlook does not support multiple versions of the Cisco Unified MeetingPlace plug-in on the same system.

- [Requirements for Client Installation of the Cisco Unified MeetingPlace Plug-In for Microsoft Outlook, page 7](#)
- [Installing the Cisco Unified MeetingPlace Plug-In for Microsoft Outlook Locally on the End-User PC, page 8](#)
- [Installing the Cisco Unified MeetingPlace Plug-In for Microsoft Outlook with MSI, page 8](#)
- [Installing the Cisco Unified MeetingPlace Plug-In for Microsoft Outlook By Using an Automated Distribution Tool, page 9](#)

Related Topics

For information about how to uninstall or upgrade the Cisco Unified MeetingPlace plug-in for Microsoft Outlook, see the *Installation, Upgrade, and Migration Guide for Cisco Unified MeetingPlace* at http://www.cisco.com/en/US/products/sw/ps5664/ps5669/prod_installation_guides_list.html.

Requirements for Client Installation of the Cisco Unified MeetingPlace Plug-In for Microsoft Outlook

- Install the Cisco Unified MeetingPlace plug-in for Microsoft Outlook on the PCs of all Microsoft Outlook end users that are connected to your Microsoft Exchange Server. If a Microsoft Outlook end user does not have the plug-in installed when the user clicks the MeetingPlace tab in a received meeting notification, that user may see an error. Users who are not connected to the Microsoft Exchange Server do not see the MeetingPlace tab.
- If Microsoft Outlook delegates will use the Microsoft Outlook calendar to schedule Cisco Unified MeetingPlace meetings on behalf of other users, then each Microsoft Outlook delegate and each person on whose behalf meetings are scheduled must install the Cisco Unified MeetingPlace plug-in for Microsoft Outlook.

**Note**

Microsoft Outlook delegates are completely separate from Cisco Unified MeetingPlace delegates. The [Type of user](#) and [User ID of delegate](#) fields in Cisco Unified MeetingPlace user profiles do not affect the privileges and capabilities of Microsoft Outlook delegates.

Installing the Cisco Unified MeetingPlace Plug-In for Microsoft Outlook Locally on the End-User PC


Before You Begin

- Install the msft_int license. See the [Installing and Managing Licenses for Cisco Unified MeetingPlace](#) module.
- If you want to enable each user to use one calendar to schedule and manage meetings on multiple Cisco Unified MeetingPlace systems, then complete the “[Adding Cisco Unified MeetingPlace Systems to the Plug-In for Microsoft Outlook](#)” section on page 6.
- Read the “[Requirements for Client Installation of the Cisco Unified MeetingPlace Plug-In for Microsoft Outlook](#)” section on page 7.

Restriction

This installation option is available only for Windows PCs. The “Download Outlook Plug-In” link on the end-user web interface does not appear for other PCs.

Procedure

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- Step 1** Sign in to the end-user PC with administrator access.
- Step 2** Sign in to the Cisco Unified MeetingPlace end-user web interface of an internal Web Server.
- Step 3** Click **Download Outlook Plug-In**.
- Step 4** Click **Save**.
- Step 5** After the setup.exe file is downloaded, complete these steps on the client PC:
- Exit the Microsoft Outlook client software.
 - Run the setup.exe file.
-  **Note** To make the Cisco Unified MeetingPlace scheduling form available to any user who logs in to a specific computer, use the **-admin** switch to install the client software. Specifically, click **Start > Run**, then enter `<pathname> setup.exe -admin`.
- Click **OK** to install.
- Step 6** After installation is complete, launch Microsoft Outlook.
- Step 7** Verify that you can schedule meetings by clicking the MeetingPlace tab and filling out the scheduling form.
- For details, click **Help** in the scheduling form.
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What to Do Next

(Optional) Proceed to the “[Customizing the Cisco Unified MeetingPlace Scheduling Form for Microsoft Outlook](#)” section on page 10.

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Installing the Cisco Unified MeetingPlace Plug-In for Microsoft Outlook with MSI

Use the following information to “push” the MSI file out to end-users.

Obtain the Cisco Unified MeetingPlace plug-in for Microsoft Outlook at <http://application-server/outlook/public/setup.msi>.

By default, MSI installs the plug-in at `$ProgramFiles\Cisco\MeetingPlace\MPOI\MP4OL.dll` or `MP4OL64.dll`.

These are the MSI commands:

- **SERVERURL:** Cisco Unified MeetingPlace server URL
- **ADMIN:**
 - Value of 1, when the plug-in is installed for all users. This is the default value.
 - Value of 2, when the plug-in is installed for the current user.
- **LOADHIDDENIEWIN:** Pass 1 to load a hidden Internet Explorer window after Microsoft Outlook starts up. By default, Internet Explorer is not loaded after Microsoft Outlook starts up.

Installing the Cisco Unified MeetingPlace Plug-In for Microsoft Outlook By Using an Automated Distribution Tool

This section describes how to use an automated distribution system, such as the Microsoft Systems Management Server (SMS), to remotely distribute and install the Cisco Unified MeetingPlace plug-in for Microsoft Outlook.

You can install the Cisco Unified MeetingPlace plug-in for Microsoft Outlook using either or both of the following switches:

- **Silent**—Suppresses the need for user input.
- **Admin**—Installs the Cisco Unified MeetingPlace plug-in for Microsoft Outlook for access by all users of a computer.

Before You Begin

- Install the `msft_int` license. See the [Installing and Managing Licenses for Cisco Unified MeetingPlace](#) module.
- If you want to enable each user to use one calendar to schedule and manage meetings on multiple Cisco Unified MeetingPlace systems, then complete the [“Adding Cisco Unified MeetingPlace Systems to the Plug-In for Microsoft Outlook”](#) section on page 6.
- Read the [“Requirements for Client Installation of the Cisco Unified MeetingPlace Plug-In for Microsoft Outlook”](#) section on page 7.

Restriction

Cisco Systems does not provide technical support for automated distribution tools.

- SMS per-user mode is not supported.
- If you choose to install or uninstall silently while using Window Vista, make sure that you open the command console in “run as administrator” mode.
- Make sure that you close the Microsoft Outlook client before upgrading or uninstalling the Cisco Unified MeetingPlace plug-in.
- If users are signing in to their computers with remote desktop while you are installing, make sure that they restart their computers. Otherwise, the Cisco Unified MeetingPlace for Microsoft Outlook integration may not work correctly.

Procedure

- Step 1** (Optional) Test that the installation switches work correctly by completing these steps from a client PC:
- a. Choose **Start > Run** and enter: <path to setup.exe>/admin /silent.
 - b. Verify that no user prompts appear on the end user PC.
 - c. Verify that the following server information exists in the registry:
 - HKCU\software\Latitude\MeetingPlace for Outlook
 - HKU\default\software\Latitude\MeetingPlace for Outlook (admin)
- Step 2** Use an automated distribution tool to distribute and install the setup.exe file on end-user PCs. Refer to the documentation for your specific automated distribution tool.
- Step 3** Instruct the end user to verify successful installation by completing these steps on the end-user PC:
- a. Restart or launch Microsoft Outlook.
 - b. Open the calendar.
 - c. Verify that the MeetingPlace tab works.
- Step 4** Remind end users that they can click **Help** in the Cisco Unified MeetingPlace scheduling form.
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What to Do Next

(Optional) Proceed to the [“Customization Options for Scheduling from Microsoft Outlook”](#) section on page 11.

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Customizing the Cisco Unified MeetingPlace Scheduling Form for Microsoft Outlook

From Microsoft Outlook, users access the Cisco Unified MeetingPlace scheduling form by creating or opening a calendar appointment and then clicking the MeetingPlace tab. You can choose the information and options that users see in the Cisco Unified MeetingPlace scheduling form.

Procedure

- Step 1** Sign in to the Cisco Unified MeetingPlace Administration Center.
- Step 2** Click **System Configuration > Customize Outlook Interface**.
- Step 3** Choose the language.
- Step 4** Customize or hide fields as desired for the scheduling form specific to that language.
- Step 5** Click **Save**.
- Step 6** Repeat this task for each language used on your system.
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Related Topics

- [Field Reference: Customize Outlook Interface](#) in the [Administration Center Page References for Cisco Unified MeetingPlace](#) module
- [Customization Options for Scheduling from Microsoft Outlook](#), page 11

Customization Options for Scheduling from Microsoft Outlook

Customization Option	Documentation
Customizing the scheduling form	Customizing the Cisco Unified MeetingPlace Scheduling Form for Microsoft Outlook , page 10 Configuring Flex Fields for Cisco Unified MeetingPlace module
Customizing e-mail notification	Customizing E-Mail Notifications for Cisco Unified MeetingPlace module
Changing which meeting template is used by default	Changing the Default Meeting Template for Meetings Scheduled From Microsoft Outlook in the Configuring Meetings for Cisco Unified MeetingPlace module

About the Cisco Unified MeetingPlace Plug-in and Different Versions of Microsoft Outlook

The following section describes some differences that you may find when using the Cisco Unified MeetingPlace Release 7.1 plug-in with Microsoft Outlook 2003, 2007, and 2010.

Feature	Microsoft Outlook 2003	Microsoft Outlook 2007	Microsoft Outlook 2010
Location of MeetingPlace settings	Settings are found on the MeetingPlace tab (Tools > Option).	MeetingPlace settings are exposed directly as a drop-down item from the MeetingPlace button on the Microsoft Outlook 2007 toolbar.	MeetingPlace settings are exposed directly as a drop-down item from the MeetingPlace button on the Microsoft Outlook 2010 toolbar.
Notifications	Supports notifications in RTF format.	Supports notifications in plain text format. Does not support RTF format.	Supports notifications in plain text format. Does not support RTF format.
Single sign-on (SSO) authentication	SSO using Active Directory is not supported. System will default to the Remember Me authentication method instead. SSO using Microsoft Exchange is supported.	Supported using either Active Directory or Microsoft Exchange. Delegates are not supported if you choose SSO with Active Directory.	Supported using either Active Directory or Microsoft Exchange. Delegates are not supported if you choose SSO with Active Directory.

