Cisco TelePresence Management Suite Extension for Microsoft Exchange Software version 4.0

User Guide
May 2014

Contents

Introduction

When your organization has Cisco TMSXE installed, you can book telepresence meetings the same way you would book any other meeting using Outlook. If your organization has a WebEx site set up to work with telepresence, you can also add WebEx to your telepresence meetings from Outlook.

This short guide explains how to make use of these features.

How booking works

When you book from Outlook, the telepresence management backend (Cisco TMS) will automatically add default settings, reserve the necessary infrastructure resources, and route your telepresence meeting. If you are booking WebEx, the WebEx backend will set this up for you according to the default settings.

If you want to modify any of these settings, or allow additional participants to dial into your meeting, you need access to one of the following:

■ The Cisco TelePresence form—a custom Outlook form that shows up in your meeting invitations as a separate Cisco TelePresence tab.
See Using the Cisco TelePresence form [p.3].
Note that the form does not include WebEx settings.

■ WebEx Productivity Tools with TelePresence—an Outlook plug-in that adds a special panel to your meeting invitations.
See Booking using WebEx Productivity Tools with TelePresence [p.5].

The WebEx Scheduling Mailbox

If configured by your administrator, you can also add WebEx to your meeting invitation directly from Outlook by including a special invitee; the WebEx Scheduling Mailbox.

The mailbox may be called simply "webex" or something different—request this information from your administrator if it has not been made available to you.

Best practices for booking

Note that you cannot move a meeting from the past to the future. This includes changing the start time of a meeting that is already ongoing.

We also recommend the following practices to keep calendars consistent and ensure a reliable booking experience:

- Send any updates immediately if updating an occurrence of a meeting series, rather than accumulating updates on different occurrences before sending.
- Use the **Resources** field or the **Add Telepresence Rooms** button on the Productivity Tools panel to modify the participant list.
  Adding and removing participants by using the checkboxes in the Outlook Scheduling Assistant is not reliably detected by Cisco TMSXE.
- When changing the recurrence pattern of a meeting series or creating exceptions from the series, use Outlook to update your booking if that is where you created it.
- Send any meeting invites from your own mailbox rather than booking directly from room mailboxes.
- All rooms that will be part of a meeting must be left with a **Show As** status of *Busy*.
  Setting a room mailbox to *Free* for any booking will remove that room from the meeting, but leave other scheduled rooms and resources.
  We strongly recommend modifying the booking itself rather than using the free/busy status to remove rooms.

For WebEx users only:

- Do not edit ongoing meetings that include WebEx.
- To schedule WebEx-only meetings, use the Productivity Tool or another WebEx booking tool.
  Using the WebEx Scheduling Mailbox to book meetings with no telepresence participants will take up telepresence resources and is not recommended.
- When you want telepresence and/or WebEx for a single occurrence of a meeting series, cancel the occurrence in question and replace it with a new single meeting that includes the required resources.

Booking with Outlook

To book a meeting without access to advanced settings:

1. Open a meeting invitation and fill in the meeting subject, start and end time as you would for any Outlook meeting invitation.
2. To make your meeting include telepresence:
   - Add rooms that you know to be telepresence rooms/video enabled.
   - The invitation must include two or more telepresence rooms (or call-in/call-out participants, if Using the Cisco TelePresence form [p.3]).

If the invitation only includes one room, the room will be reserved, but no telepresence resources will be booked.

3. If you want your meeting to include WebEx, add the WebEx Scheduling Mailbox as an invitee.

4. Send the meeting invitation.
   If your booking includes more than one telepresence room, you will receive confirmation from Cisco TMS that the meeting has been set up, and information on how participants will connect.

5. Forward this information to the invitees, or paste it into the original meeting invitation and send an update to distribute the information.

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

Updating Outlook-created bookings from Cisco TMS

If you or your administrator modifies a booking created from Outlook using Cisco TMS, Cisco TMSXE will keep the resource reservations up to date.

Note however that because of security restrictions in Exchange, Cisco TMSXE will not be able to update the original booking in your own calendar according to the changes made in Cisco TMS.

We also recommend against using Cisco TMS to change the recurrence pattern of or creating an exception from a series originally booked in Outlook.

When a meeting is booked without routing

If all the requested resources are not available for a meeting, you may get a response from Cisco TMSXE saying that some or all of the telepresence rooms were reserved, but that routing resources are not booked and/or not available. In this case, the telepresence part of the meeting has not been set up.

Even if these resources are later freed up, this will not update the booking.

To get the meeting to include routing, you must do one of the following:

- Set the booking to use either the connection type *Automatic Connect* or *One Button to Push*, using the Cisco TelePresence form, the Productivity Tools.
- Ask your administrator to change the meeting to *Automatic Connect* or *One Button to Push* directly in Cisco TMS.
- Delete the existing booking and create a new one with available resources. Your new meeting will then use the default routing option as configured by your administrator.

Using the Cisco TelePresence form

If the administrator has made the Cisco TelePresence custom form available to users, it will show up as a button/tab in all your meeting requests.

As a meeting organizer you can use this form to specify additional settings for the conference, override the conference defaults, and add external video or audio participants.

To use the form for a new or existing meeting:

1. Select the **Cisco TelePresence** tab for the calendar entry and make changes as desired.
   Any values left as *Default* will use the default setting as defined in Cisco TMS by the administrator.

2. When you are done changing the settings, use the **Send Update** button if submitting changes to an existing meeting.
   Do *not* click **Save and Close** as this will only modify your own calendar.

Cisco TelePresence form settings

Settings and buttons	Description
Reservation Type	Options: ■ *Automatic Call Launch*: the meeting is routed and launched automatically. ■ *One Button to Push*: an on-screen button becomes available on supported endpoints when the meeting starts. ■ *Manual Connect*: routing is set up, and the videoconference master must launch the meeting. ■ *No Connect*: routing is set up, and all participants must call in to the meeting. ■ *Reservation Only*: only the rooms are reserved. No routing is attempted. The default reservation type will usually include conference routing. If routing resources are unavailable, Cisco TMSXE will attempt to book the meeting as *Reservation Only* instead.

Settings and buttons	Description
Meeting PIN	Specifying a numeric password here will require dial-in conference participants to enter this password to join the conference, provided it is supported by the Multipoint Control Unit (MCU) being used. If in doubt, confer with your administrator.
Billing Code	You can supply a billing code for the conference that will be saved with the meeting in Cisco TMS (this may be optional or required depending on Cisco TMS settings defined by your administrator).
Add >>	Use this button to add video or audio participants not listed in Exchange to the meeting. See Adding call-in and call-out participants [p.5].

Adding call-in and call-out participants

Using the Cisco TelePresence form you can add video or audio participants that are not bookable as resources in Exchange and Cisco TMS to your meeting.

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

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

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

To delete participants, select them from the list and click **Delete Selection**.

Booking using WebEx Productivity Tools with TelePresence

WebEx Productivity Tools with TelePresence integrates with Microsoft Outlook by adding a special panel to meeting invitations.

Using this panel and the advanced settings, you can book meetings that include telepresence and WebEx, telepresence only, and WebEx only. Note that WebEx Productivity Tools with TelePresence require Outlook to be in online mode in order to book telepresence resources.

If Productivity Tools are already installed, a special button will appear on your Outlook toolbar. If not, you may need to perform the installation yourself. Request this information from your administrator.

Using basic settings

From the Productivity Tools panel, you can access the following telepresence options:

- Add telepresence rooms that will be scheduled for your meeting.
- Set a number of call-in participants. Resources will be reserved for this number of people or meeting rooms to call into the meeting *in addition to* any scheduled rooms.
- Go to advanced settings.

The following WebEx options are available:

- Add a WebEx conference to your meeting.
- Add a WebEx meeting password (not your WebEx password) and select whether the password should be included in email invitations.
- Set an alternate WebEx host for your meeting.
- Go to advanced settings.

Using advanced settings

In the advanced telepresence settings, you can specify a meeting PIN, add call-out participants, or a billing code for your conference. For detail on each field in the advanced settings, see WebEx Productivity Tools with TelePresence help.

To access the help, click on the **Schedule Meeting** drop-down button: