

# Cisco TelePresence Management Suite Extension for Microsoft Exchange Software version 5.3

User Guide  
March 2017



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## 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.

## How Booking Works

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, page 6](#).

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, page 7](#).

## 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.

If prompted, always make sure to send updates to all participants to ensure that calendars stay in sync.

- 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.
- When creating a booking through an Exchange client, ensure that the **Show As** meeting option is set to **Busy**. When scheduling a meeting with some clients, selecting the option for the meeting to be an **All day event**, the **Show As** option may get automatically switched to **Free**. When you are making the booking, you have to manually reset the **Show As** option to **Busy** before saving the meeting. Meetings that have a **Show As** set to **Free** for room mailboxes will not be considered by Cisco TMSXE.

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.

## Booking with Outlook

- 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.
- If you use Cisco TMSXE to book rooms with delegate approval, you cannot use WebEx Productivity Tools with TelePresence for Outlook.

## 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, the invitation must include:
  - Two or more rooms that you know to be telepresence rooms/video enabled, or a combination of rooms and call-in/call-out participants.  
If the invitation only includes one room, the room will be reserved, but no telepresence resources will be booked.
  - If [Using the Cisco TelePresence Form, page 6](#), make sure you book at least one room in addition to any call-in participants.  
If the booking contains only call-in participants, 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.

## Using Cisco TMS to Update Bookings Created in Outlook

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 There is a Problem with a Booking

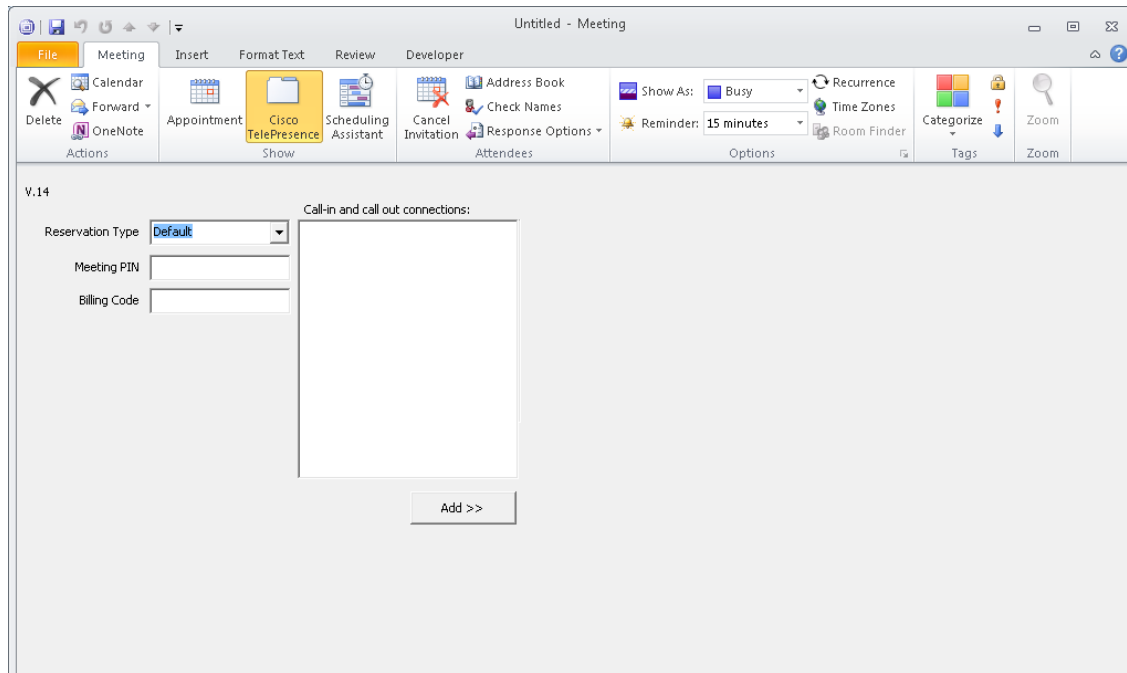
If all of the requested resources are not available for a meeting, you may get a response from Cisco TMS saying that an action is required on your part, usually:

- Rescheduling at a different time or, if there is a room availability issue, with different rooms.
- Contacting your administrator for assistance if rescheduling does not resolve the issue.

Until any such issues reported to you have been resolved, the telepresence meeting will not be able to start, and it will not be sent to telepresence endpoint calendars. The meeting will be stored in Cisco TMS as *Defective*.

## 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.

## Limitation When Receiving Meeting Invites

Outlook security does not allow previewing a meeting invite if the meeting was created using the Cisco form.

When using the Reading Pane in Outlook, you must open the invite to view the meeting details.

## Cisco TelePresence Form Settings

Settings and Buttons	Description
<b>Reservation Type</b>	<p>Options:</p> <ul style="list-style-type: none"> <li>■ <i>Automatic Call Launch</i>: the meeting is routed and launched automatically.</li> <li>■ <i>One Button to Push</i>: an on-screen button becomes available on supported endpoints when the meeting starts.</li> <li>■ <i>Manual Connect</i>: routing is set up, and the videoconference master must launch the meeting.</li> <li>■ <i>No Connect</i>: routing is set up, and all participants must call in to the meeting.</li> <li>■ <i>Reservation Only</i>: only the rooms are reserved. No routing is attempted.</li> </ul> <p>The default reservation type will usually include conference routing. If routing resources are unavailable, Cisco TMSXE will attempt to book the meeting as <i>Reservation Only</i> instead.</p>
<b>Meeting PIN</b>	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.
<b>Billing Code</b>	You can supply a billing code for the conference that will be saved with the meeting in Cisco TMS (this may be optional or required depending on Cisco TMS settings defined by your administrator).
<b>Add &gt;&gt;</b>	Use this button to add video or audio participants not listed in Exchange to the meeting. See <a href="#">Adding Call-in and Call-out Participants, page 7</a> .

## 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.

Booking Using WebEx Productivity Tools with TelePresence

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.

**Caution: Do not use WebEx Productivity Tools with TelePresence if you are using Cisco TMSXE to book rooms that must be approved by a delegate.**

## 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:

The screenshot shows the 'Meeting Options' panel with the Cisco logo in the top right. It is divided into two main sections: 'WebEx' and 'TelePresence', both with green checkmarks indicating they are enabled.

**WebEx Section:**

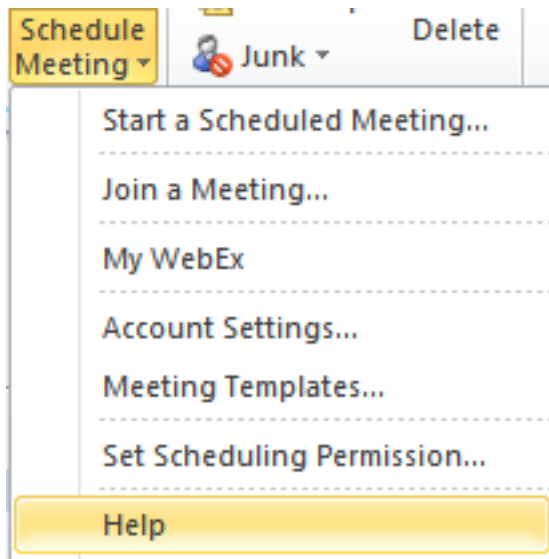
- Allow people to join using WebEx
- Meeting Password:
- Exclude password from email invitation
- Select Alternate Host [?](#)
- [Advanced WebEx Settings](#)

**TelePresence Section:**

- [Add TelePresence Rooms](#) (green button)
- Add call-in participants:  [?](#)
- [Advanced TelePresence Settings](#)



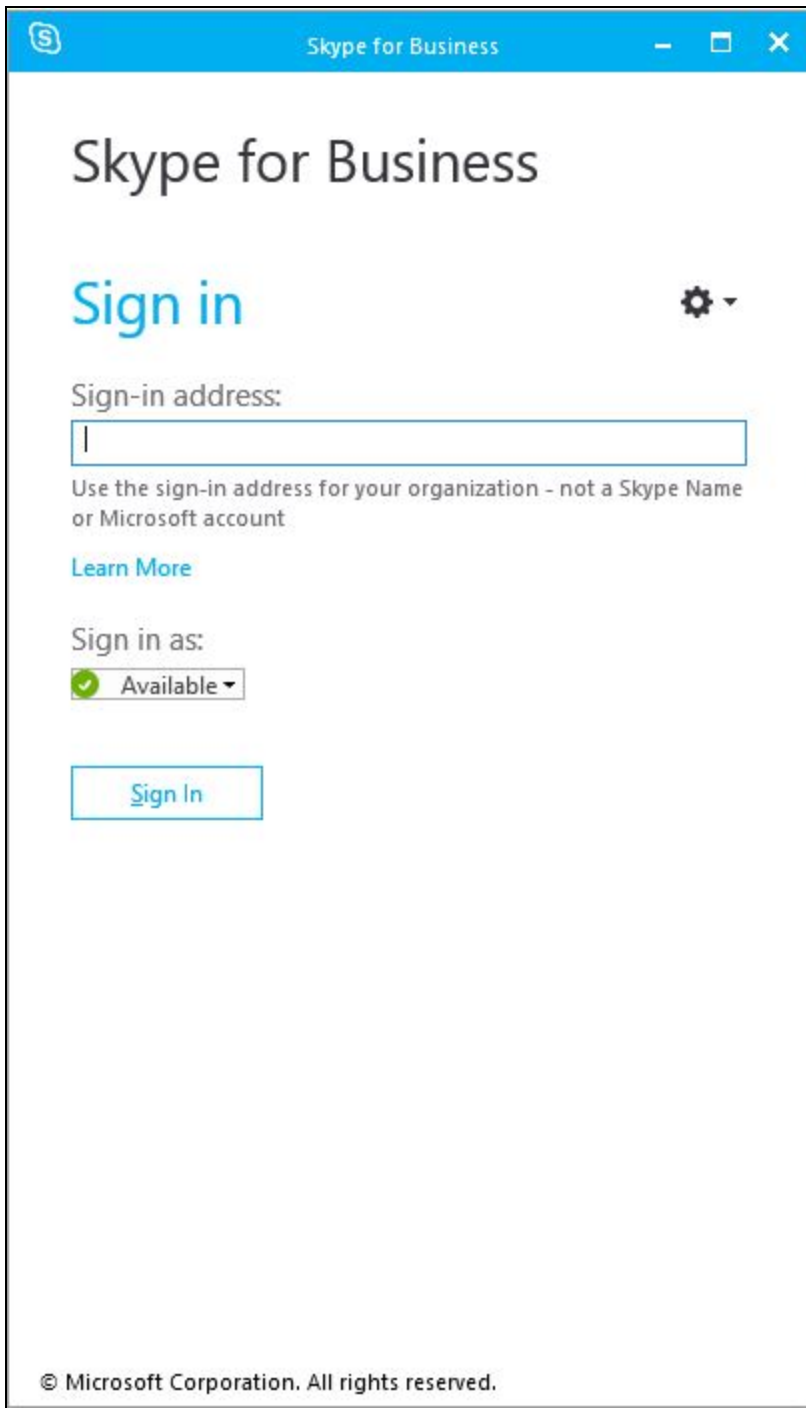
## Skype Meetings



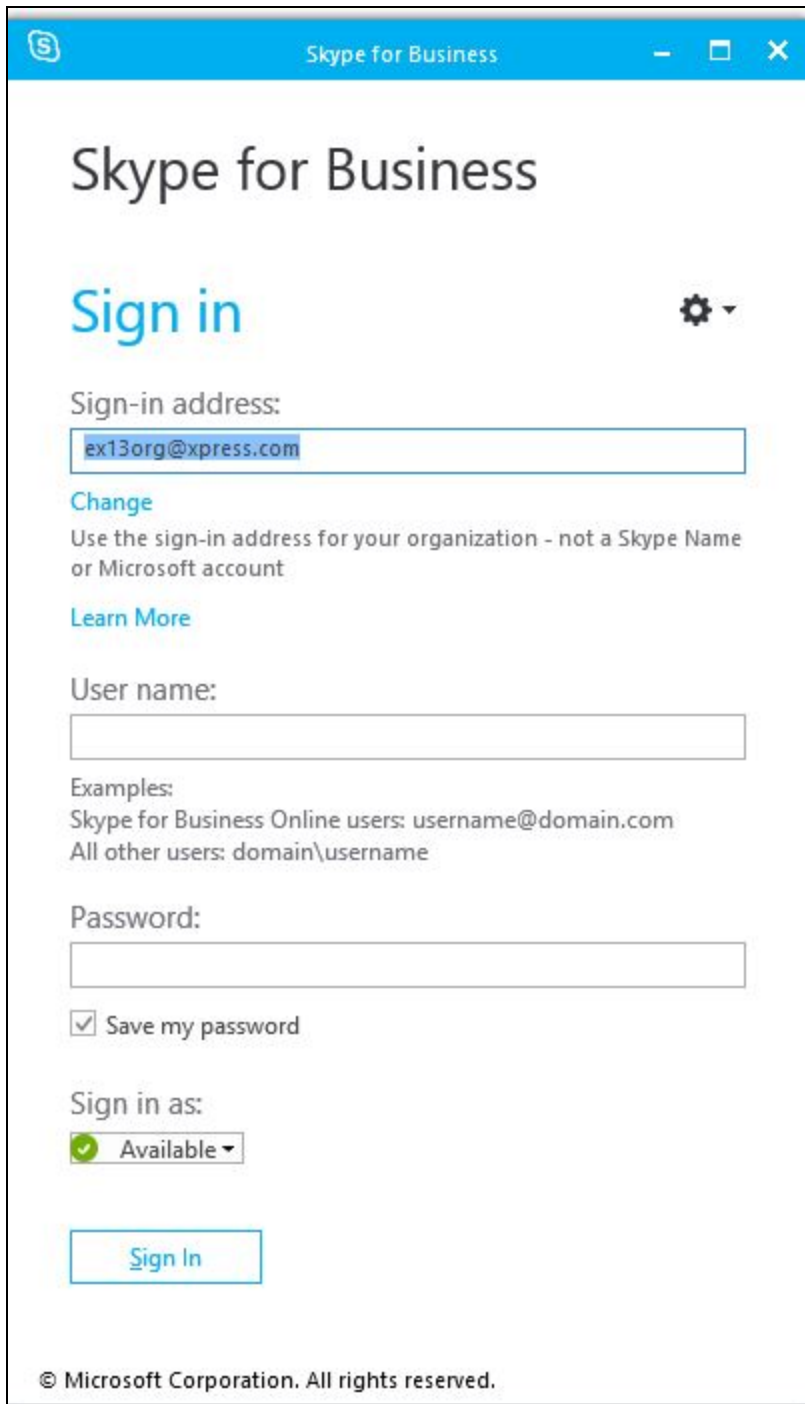
## Skype Meetings

### Prerequisite

You have to install **Skype for Business Basic 2016** before you schedule a Skype meeting and after installation, the following screen is displayed:.



Enter **Username** and **Password** and click **Sign In**.



Skype for Business

# Skype for Business

## Sign in

Sign-in address:

[Change](#)  
Use the sign-in address for your organization - not a Skype Name or Microsoft account

[Learn More](#)

User name:

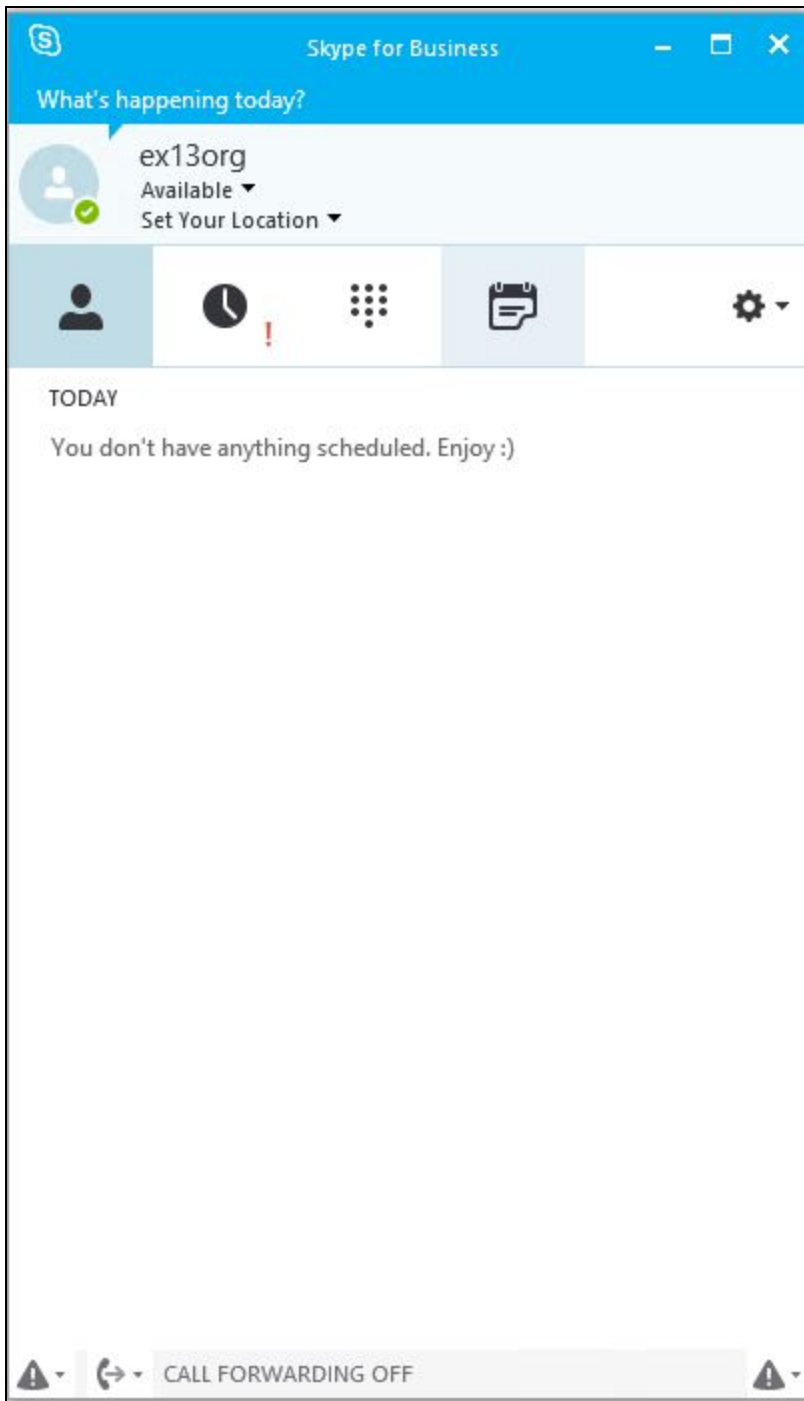
Examples:  
Skype for Business Online users: username@domain.com  
All other users: domain\username

Password:

Save my password

Sign in as:

© Microsoft Corporation. All rights reserved.



## User

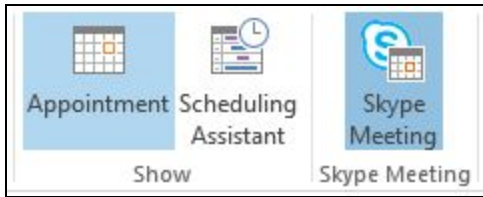
As a user , you can schedule a Skype meeting in the following ways:

- My Dedicated Meeting Space: The conference id will be same for all the new Skype meetings. By default, the Skype meeting is a dedicated meeting.
- A new meeting space: The conference id is different for each Skype meeting.

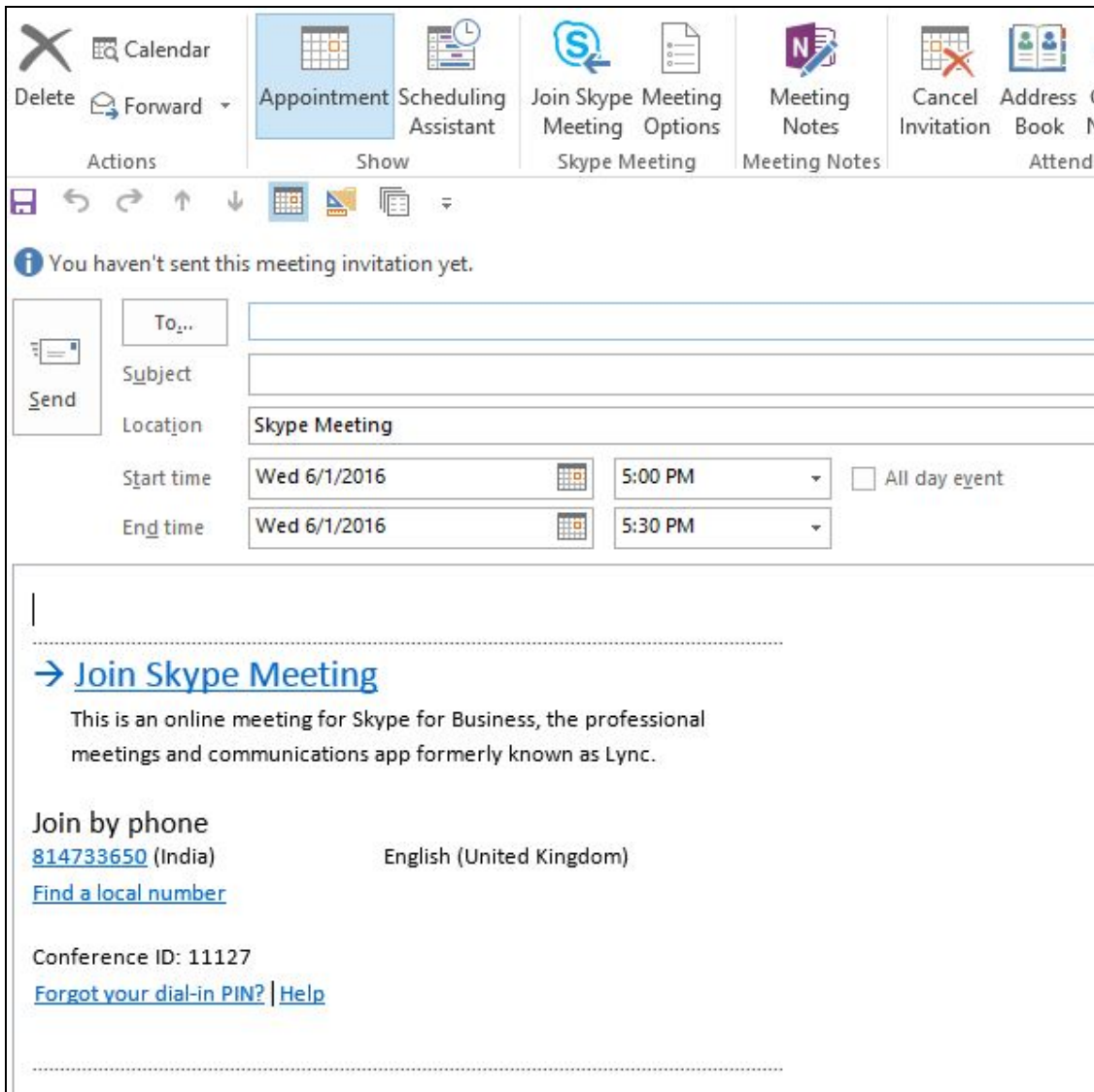
Skype Meetings

Create a dedicated Skype Meeting

1. Open **Microsoft Outlook 2013**.
2. Click the **Skype Meeting** button.



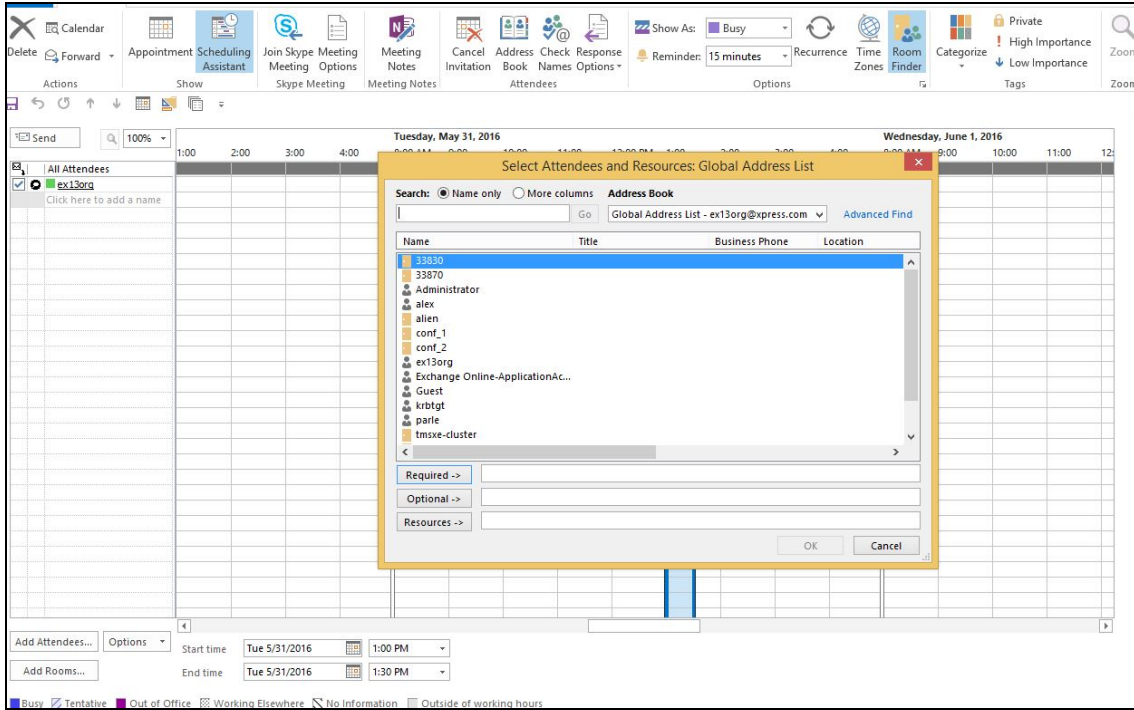
The Skype details are displayed in the email body, which consists of the **Phone number** and **Conference id** of the Skype meeting.



## Skype Meetings

### Add participants to the Skype meeting

1. Click **Scheduling Assistant** and click **Add Attendees** or **Add Rooms** and select the required resources.



## Skype Meetings

2. Click **OK**. The selected resources are added in the Skype meeting.

The screenshot shows the Outlook interface with the 'MEETING' tab selected. The ribbon includes 'Appointment Assistant', 'Join Skype Meeting', 'Meeting Options', 'Meeting Notes', 'Cancel Invitation', 'Address Book', 'Check Names', 'Response Options', 'Show As' (set to Busy), 'Reminder' (15 minutes), 'Recurrence', 'Time Zones', 'Room Finder', 'Categorize', and 'Tags' (Private, High Imp, Low Imp). Below the ribbon, a message body contains the following information:

**You haven't sent this meeting invitation yet.**

**To...** 33870; 33830

**Subject** Test Skype Meeting

**Location** Skype Meeting

**Start time** Tue 5/31/2016 2:00 PM  All day event

**End time** Tue 5/31/2016 2:30 PM

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[→ Join Skype Meeting](#)

This is an online meeting for Skype for Business, the professional meetings and communications app formerly known as Lync.

**Join by phone**  
814733650 (India) English (United Kingdom)  
[Find a local number](#)

Conference ID: 23561  
[Forgot your dial-in PIN?](#) | [Help](#)

**See more about ex13org.**

3. Click **Send**. A confirmation mail will be received .

ex13orgFn ex13orgLn invites you to this meeting.

### **Test Skyp Meeting**

Tuesday, May 31, 2016, 2:00 PM | 30 min  
(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

An agenda has not been added for this meeting

### **Join Using Telepresence**

Video address: [23561@acano.xpress.com](https://23561@acano.xpress.com)

#### **Locations:**

Lotus-VCS-EX60-Bangalore  
marimba.xchange.lab

Need more details about joining the meeting using telepresence?  
<https://10.77.205.137/tms/mlp.aspx?ConfId=1461>

Having trouble joining from a telepresence room? [Get help](#).



Skype Meetings

4. Click on the Video address to join the Skype meeting.

ex13orgFn ex13orgLn invites you to this meeting.

**Test Skyp Meeting**

Tuesday, May 31, 2016, 2:00 PM | 30 min  
(UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

An agenda has not been added for this meeting

**Join Using Telepresence**

Video address: [23561@acano.xpress.com](https://23561@acano.xpress.com)

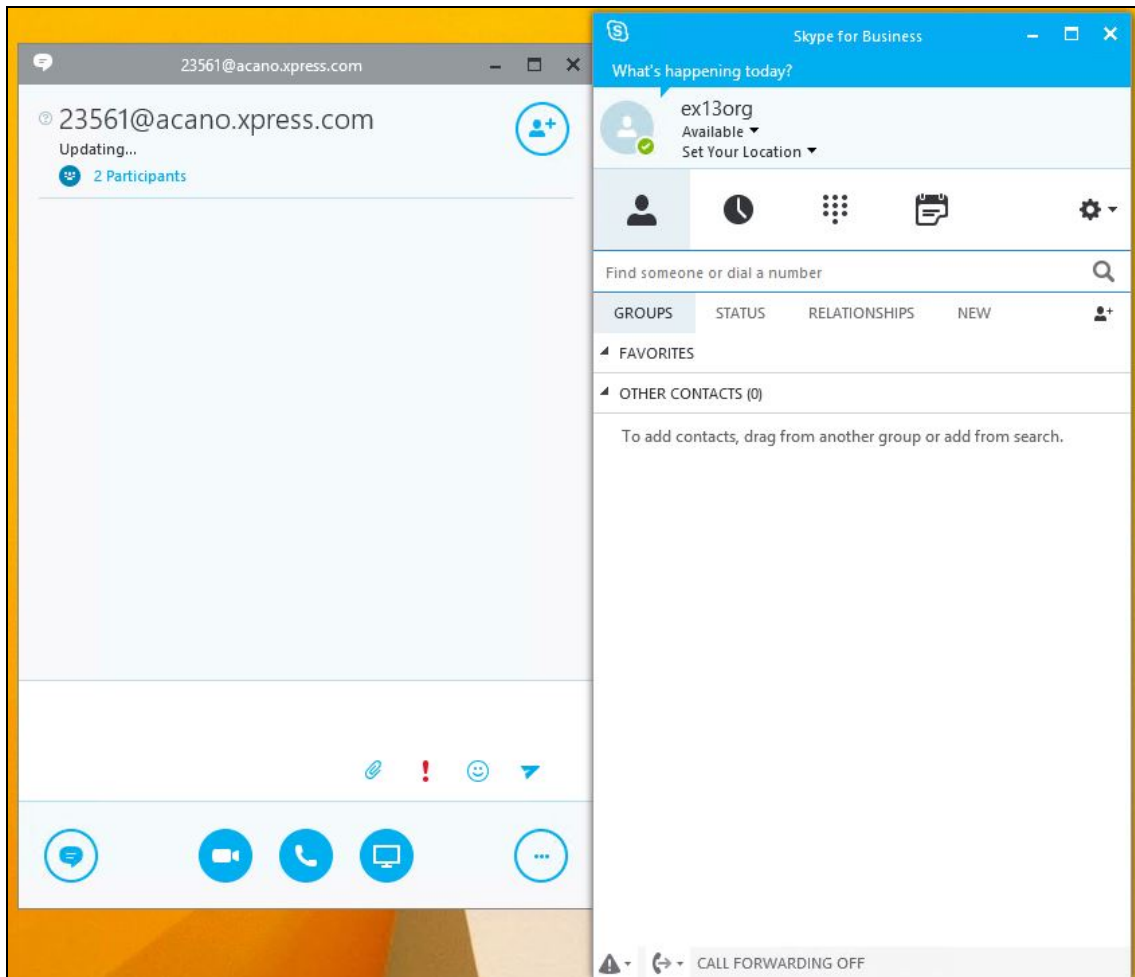
**Locations:**

Lotus-VCS-EX60-Bangalore  
marimba.xchange.lab

Need more details about joining the meeting using telepresence?  
<https://10.77.205.137/tms/mlp.aspx?ConfId=1461>

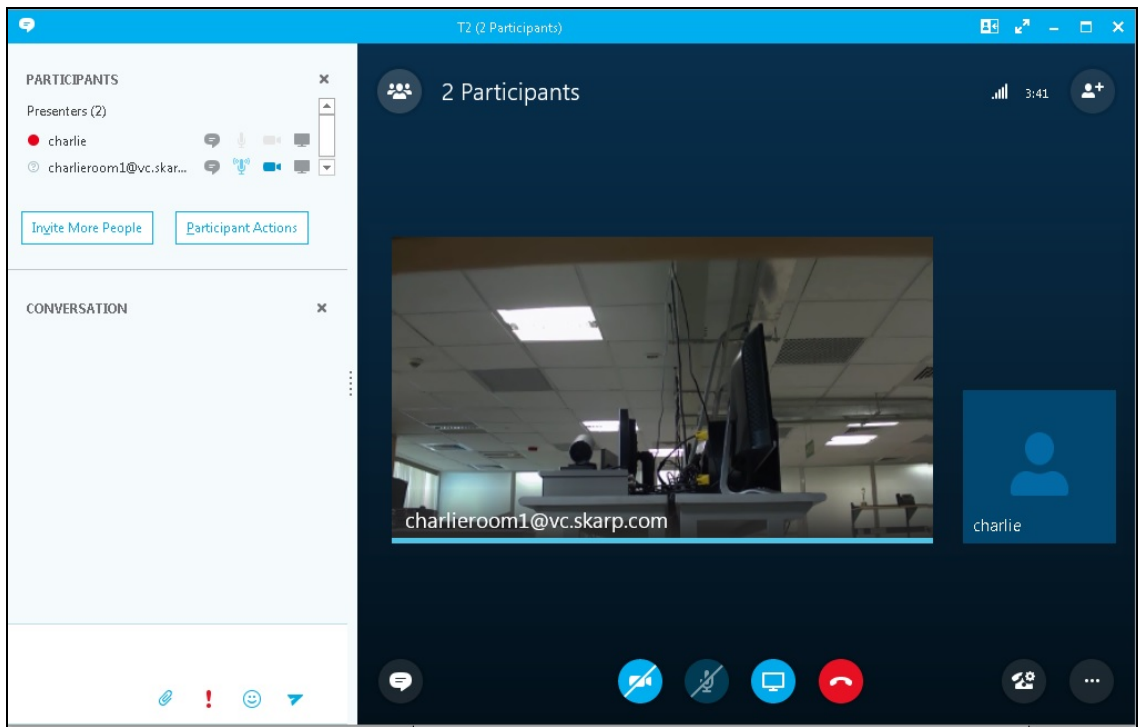
Having trouble joining from a telepresence room? [Get help.](#)

Skype Meetings



You are now a participant in the Skype meeting.

Skype Meetings



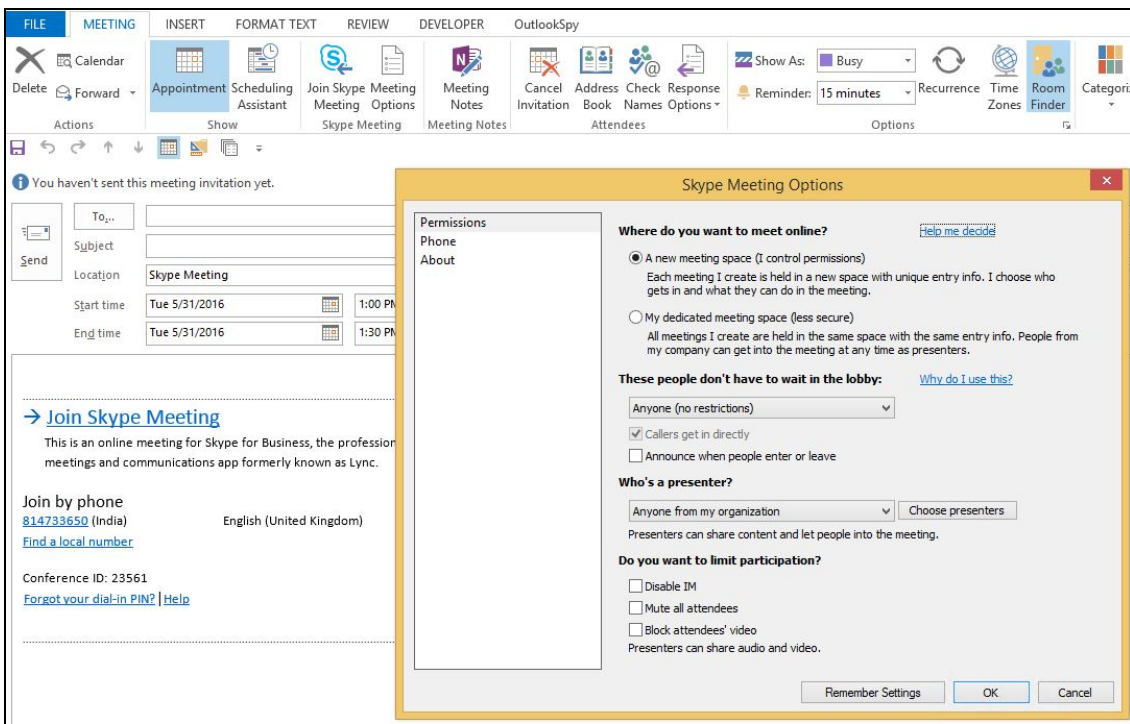
Skype Meetings

Schedule a new meeting space for Skype meeting

1. Refer to Steps 1- 4 as given above.
2. Click **Meeting options**.



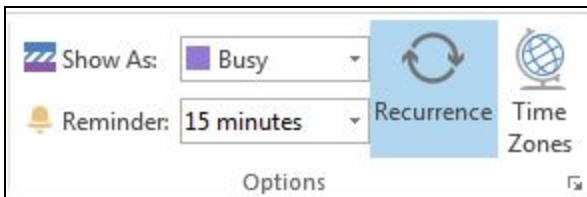
A pop-up window is displayed where you can select the option **A new meeting space (I control permissions)**.



3. Click **OK**. The dedicated Conference id will changed and you will be assigned a new conference id.
4. Click **Send**. You will receive a confirmation mail with a new video address.

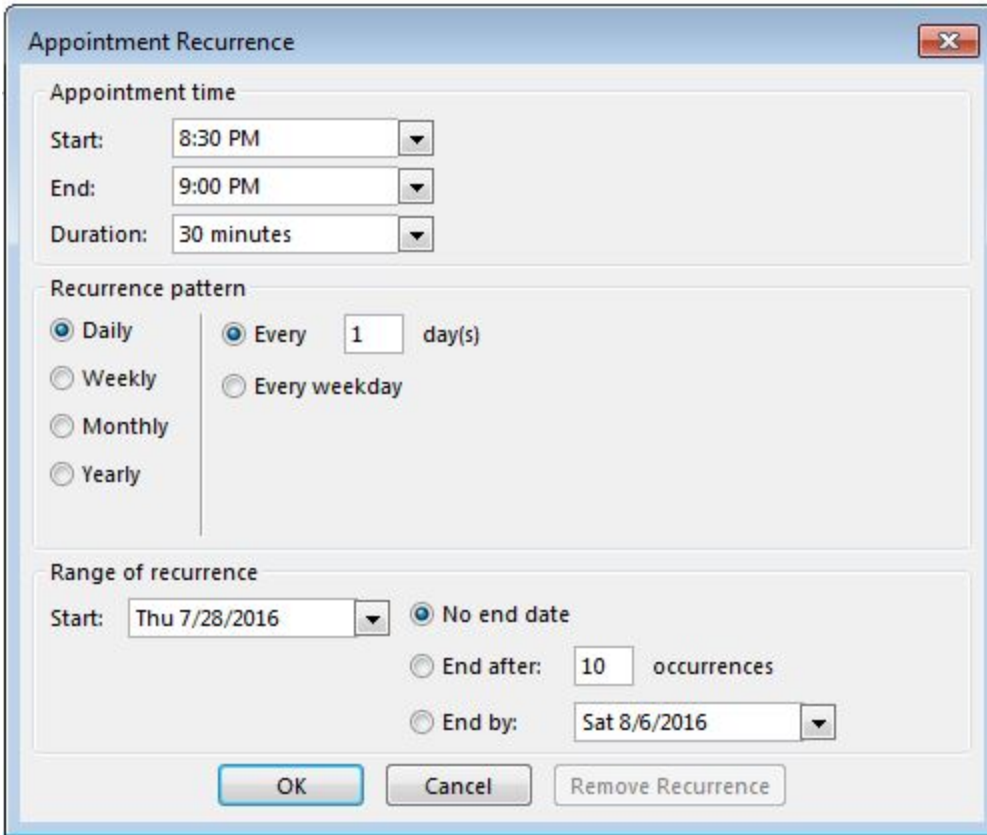
Create Recurrent Skype meeting

1. Click **Recurrence**.



Skype Meetings

2. Select the required recurrence pattern like Daily, Weekly and Monthly.



3. Refer to Steps 1 - 7 as given above.

Edit Skype Meeting

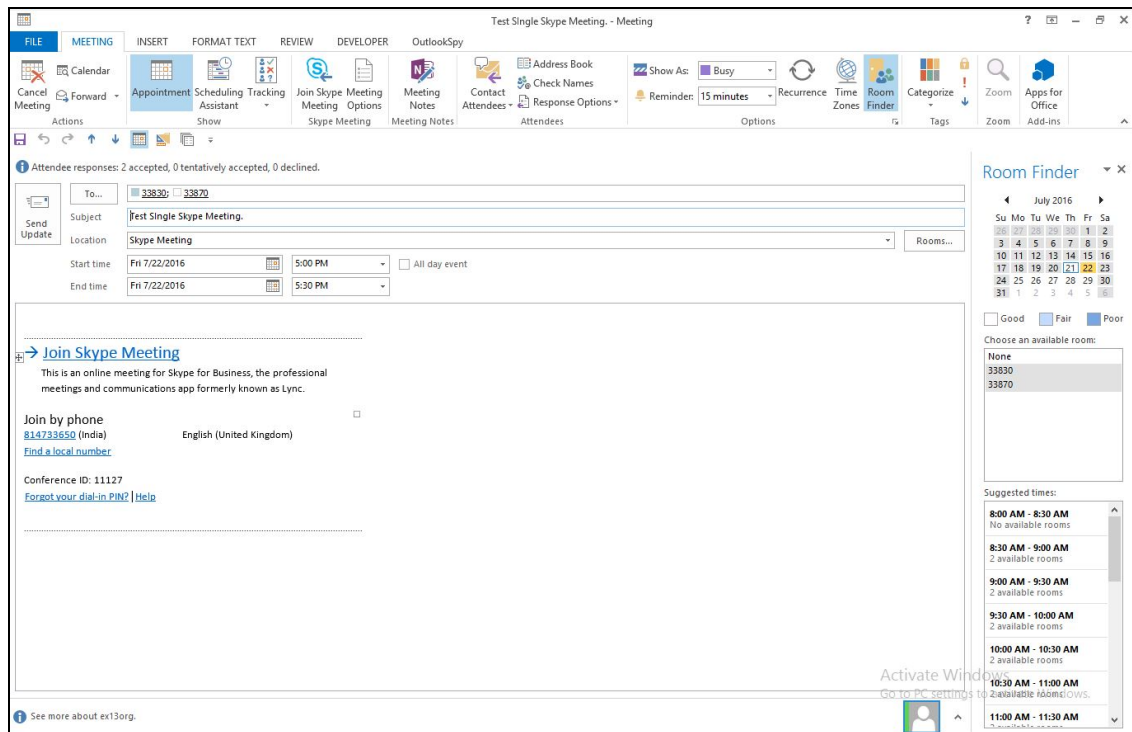
You can edit a Skype meeting in the following scenarios:

Scenario 1

When you edit a single Skype meeting, you can update the meeting details such as title, time and participants (add or delete participants).

## Skype Meetings

1. Click on the Skype meeting that has to be modified.



2. Make the required modifications.
3. Click **Send**. A confirmation mail is send with updated details to the organizer.

## Scenario 2

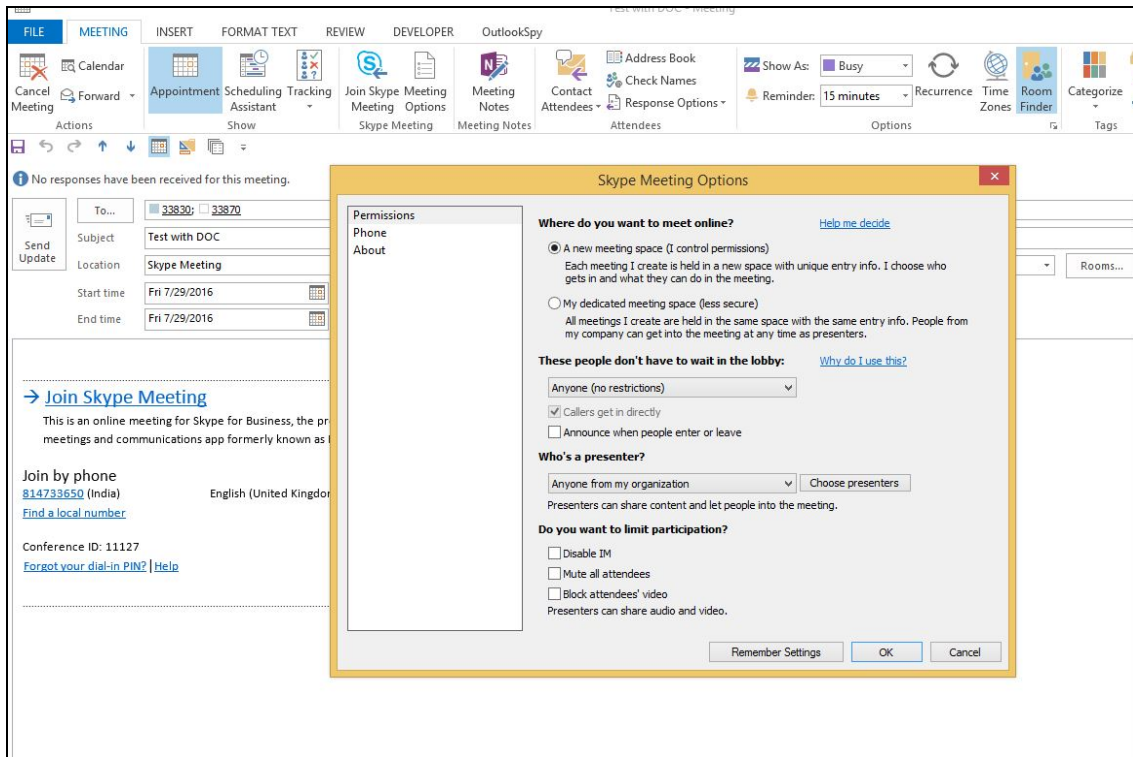
When you change the meeting from Dedicated to New space meeting, then the default conference id is changed and a new conference id is generated for the meeting.

1. Click on the **Skype Meeting** that has to be modified.
2. Make the required modifications. For example: date, time, title and participants.
3. Click **Meeting options**.



A pop-up window is displayed where you can select the option **A new meeting space (I control permissions)**.

## Skype Meetings



1. Click **OK**. The dedicated Conference id will be changed and you will be assigned a new conference id.
2. Click **Send**. You will receive a confirmation mail with the updated details.

## Delete Skype Meeting

You can delete a Skype meeting in the following ways:

## Delete a single Skype meeting

You can delete a Skype meeting in the following ways:

1. Click on the meeting that has to be deleted. The meeting is displayed.
2. Click **Delete**. The meeting is removed from Outlook and Cisco TMS.

Or

Select the meeting, right click on it and select **Delete**.

Or

Select the meeting and click **Delete** option available in the menu bar.

## Delete a recurrent Skype meeting

You can delete a Skype meeting in the following ways

1. Click on the Skype meeting series that has to be deleted. There are two options that are available:
  - a. **Just this one** - This options allows you to delete the single occurrence of the Skype meeting. When you select '**Just this one**' option,

## Skype Meetings

The meeting is opened. click **Cancel Meeting**. A confirmation message whether to delete all occurrences of the meeting or only the selected occurrence is displayed.

Click **Delete this occurrence** and click **OK**. The selected occurrence is deleted from Outlook and Cisco TMS.

- b. **The entire series** - This option allows you to delete the series of the Skype meeting. When you select **The entire series** option, Click **Delete the series** and click **OK**. The selected series is deleted from Outlook and Cisco TMS.

Or

1. Select the meeting, right click on it and select **Cancel**. There are two options available  
**Cancel Occurrence:** Click on this option, the cancellation mail is displayed, click '**Send Cancellation**'. The selected occurrence is deleted from Outlook and Cisco TMS.  
**Cancel Series:** Click on this option, the cancellation mail is displayed, click **Send Cancellation**. The selected series is deleted from Outlook and Cisco TMS.

Or

1. Select the meeting and click **Cancel** option available in the menu bar. There are two options available  
**Cancel Occurrence:** Click on this option, the cancellation mail is displayed, click **Send Cancellation**. The selected occurrence is deleted from Outlook and Cisco TMS.  
**Cancel Series:** Click on this option, the cancellation mail is displayed, click **Send Cancellation**. The selected series is deleted from Outlook and Cisco TMS.



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