

ReadiManager®

Scheduling Guide for IBM® Lotus® Notes®



Trademark Information

Polycom®, the Triangles logo, ReadiManager®, SoundPoint®, SoundStation®, ViaVideo®, VoiceStation®, and Vortex are registered trademarks of Polycom, Inc. Convene™, Global Management System™, iPower™, MGC™, People+Content™, People On Content™, Polcyom Conference Suite™, Polycom HD Voice™, Polycom PathNavigator™, Polycom VideoPlus™, Polycom VoicePlus™, PVX™, RAS™, ReadiConvene™, RMX 2000™, RSS™, V2iU™, VS4000™, VSX™, and VTX™ are trademarks of Polycom, Inc.

Other product and corporate names may be trademarks of other companies and are only used as a fair use reference without intent to infringe.

Patent Information

The accompanying product is protected by one or more U.S. and foreign patents and/or pending patent applications held by Polycom, Inc.

3725-18011-001A (12/2007)

3.0

© 2007 Polycom, Inc. All rights reserved.

Polycom Inc.
1765 West 121st Avenue
Westminster, CO 80234-2301 U.S.A.

No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Polycom, Inc. Under the law, reproducing includes translating into another language or format.

As between the parties, Polycom, Inc. retains title to, and ownership of, all proprietary rights with respect to the software contained within its products. The software is protected by United States copyright laws and international treaty provision. Therefore, you must treat the software like any other copyrighted material (e.g. a book or sound recording).

Every effort has been made to ensure that the information in this manual is accurate. Polycom, Inc. is not responsible for printing or clerical errors. Information in this document is subject to change without notice.

Contents

1 Setting Up the RediManager® Scheduling Plugin

Install the RediManager Scheduling Plugin	1-1
Create the RediManager Scheduling Database	1-2
Enter the RediManager System Logon Settings	1-2
View the RediManager Scheduling Plugin Version	1-3

2 Scheduling RediManager® System Meetings

Open Your RediManager System Database	2-1
Schedule a RediManager System Video Meeting	2-2
Edit a Scheduled Meeting	2-5

3 Applying Advanced Conference Settings to RediManager® System Meetings

Advanced Conference Settings	3-1
Edit Conference Settings	3-4

Index	Index-1
--------------------	----------------

Setting Up the ReadManager® Scheduling Plugin

This chapter describes how to install and set up the ReadManager® Scheduling Plugin for IBM® Lotus® Notes®. It includes the following topics:

- [“Install the ReadManager Scheduling Plugin”](#) on page 1-1
- [“Create the ReadManager Scheduling Database”](#) on page 1-2
- [“Enter the ReadManager System Logon Settings”](#) on page 1-2
- [“View the ReadManager Scheduling Plugin Version”](#) on page 1-3

Install the ReadManager Scheduling Plugin

To install the ReadManager Scheduling Plugin for Lotus Notes you need:

- Microsoft Windows XP or Windows 200x
- IBM Lotus Notes 7.x
- An internet browser
- Adobe® Flash® Player 9.x (available at www.adobe.com)
- The IP address of the ReadManager SE200 network appliance and your username, password, and domain. See your ReadManager system administrator for this information.

To install the ReadManager Scheduling Plugin for Lotus Notes

- 1 Open a browser and in the **Address** field enter the ReadManager SE200 appliance IP address.
- 2 When the **ReadManager** system login screen appears, enter your **Username** and **Password**.
- 3 If necessary, select a different **Language** or **Domain**.

- 4 Click **Login**.
- 5 From the ReadiManager toolbar, click **Downloads**.
- 6 Click **Polycom ReadiManager Lotus Notes Plugins**.
- 7 In the index directory for your selected language, click the **SE200_mail7_en-US.ntf** file.
- 8 Save the file to your local computer.
- 9 Close the ReadiManager SE200 **Downloads** screen and click **Log Out**.
- 10 Extract the downloaded file to the following directory:
C:\Program Files\lotus\notes\data

Create the ReadiManager Scheduling Database

You can either design a new database with the **SE200 Mail (R7) en-US** template or replace the design of an existing database with the template. The following procedure describes how to design a new database with the template.

To create the ReadiManager Scheduling Plugin for Lotus Notes

- 1 Open **Lotus Notes**.
- 2 Select **File > Database > New**.
The **New Database** dialog box opens.
- 3 Enter a **Title** for the new meeting database.
This name becomes the **File name** for the Lotus Notes database file.
- 4 From the **Template** list, select **SE200 Mail (R7) en-US**.
- 5 Click **OK**.
Your **Lotus Notes Mail - Inbox** opens.

Enter the ReadiManager System Logon Settings

The ReadiManager system administrator set up a username and password for you. Before you can schedule a video meeting, you must enter these logon settings into the Lotus Notes Plugin.

To enter your RediManager system logon settings

- 1 From the **Lotus Notes Mail - Inbox**, select **Mail ▼ > Switch to Calendar**.
The **Lotus Notes Calendar** opens.
- 2 From the action bar, click **Video > Settings**.
- 3 Enter the same **Username, Password, Server IP Address**, and **Domain** that you used to download the Lotus Notes Plugin.
- 4 Click **Save**.

Note

You can view these settings at any time. From the action bar, select **Video > Settings**.

View the RediManager Scheduling Plugin Version

If you encounter difficulties scheduling meetings through Lotus Notes, you may need to determine the RediManager Scheduling Plugin version.

To view the RediManager Scheduling Plugin version

- >> From the **Lotus Notes Calendar**, select **Video > About RediManager**.
The RediManager dialog box displays the version number.

Scheduling ReadManager[®] System Meetings

This chapter describes how to use the ReadManager[®] Scheduling Plugin for IBM[®] Lotus[®] Notes[®] to schedule video meetings. It includes the following topics:

- [“Open Your ReadManager System Database”](#) on page 2-1
- [“Schedule a ReadManager System Video Meeting”](#) on page 2-2
- [“Edit a Scheduled Meeting”](#) on page 2-5

In addition to these procedures, the ReadManager system supports all Lotus Notes meeting **Owner Actions** such as **Reschedule**, **Cancel**, and **Confirm**. For information on these procedures, see the Lotus Notes online help.

Open Your ReadManager System Database

To open your ReadManager system database in your Lotus Notes calendar

- 1 Open Lotus Notes.
- 2 Select **File > Database > Open**.
- 3 From the **Database** list, select the database that you created in [“Create the ReadManager Scheduling Database”](#) on page 1-2 and click **Open**.

Your Lotus Notes **Mail - Inbox** opens and the **Video** menu is now available on the action bar.

- 4 Click **Mail ▼** and select **Switch to Calendar**.

The **Lotus Notes Calendar** opens.

Schedule a ReadiManager System Video Meeting

To schedule a ReadiManager system video meeting

- 1 Open your **Lotus Notes Calendar**. (See [Open Your ReadiManager System Database](#).)
- 2 Click **Schedule a Meeting**.
- 3 Select a meeting type:
 - a Click **Meeting ▼**.
The **Change Calendar Entry Type** dialog box opens.
 - b Select **Video Meeting**.
 - c Click **OK**.
The **Calendar Entry** type changes accordingly and the standard Lotus Notes scheduling form includes the ReadiManager system scheduling form.

Note

Microsoft Lotus Notes automatically assigns you as **Chairperson**; you cannot change this assignment. If the **Lecturer** or **Video Chairperson** fields are not available, the selected template does not support these features. The role of **Video Chairperson** differs from that of **Chair**.

- 4 Enter a meeting name in the **Subject** and set the **Starts** and **Ends** dates and times.
- 5 To make the meeting recurring:
 - a Check **Repeats** and in the **Repeat Options** dialog box set:
 - » Recurrence frequency: **Daily, Weekly, Monthly by Date, Monthly by Day, Yearly**, or **Custom**.
 - » Recurrence range: Starting date and either end date or total number of meetings
The maximum number of recurrences is 52.
 - b Click **OK**.
- 6 To add **Invitees**, enter names into the **Required**, **Optional**, and **FYI** fields or click the **Address Book** icon and select names (including room names) using the **Select Addresses** dialog box.
 - **Required (to)**: These people receive a meeting invitation that includes response options (for example, accept, decline, or propose new time).
 - **Optional (cc)**: These people are considered optional participants but do receive a meeting invitation that includes the same response options that required participants receive.

- **FYI (bcc):** These people receive a meeting notice (but not an invitation), and can optionally add the meeting to their **Calendar**. Their names do not appear in the **Video Resources** fields (see step 11 on page 2-3), and you cannot specify or edit their call information. Other invitees do not see their names on their invitations.

As you add invitees and rooms, they appear in the **Video Resources** list (described in step 11).

- 7 In the **Where** fields, specify location, rooms, and additional information as you do for a Lotus Notes meeting.

Notes

- Only Lotus Notes uses the **Where** and **Online** meeting fields.
- To reserve rooms on the ReadManager system select them from the **Address Book** as you would invitees.

- 8 Click **Scheduler** to view invitee availability. Lotus Notes tracks invitee availability.
- 9 View **Conference Resources** to view device availability. The ReadManager system tracks device availability.
- 10 Adjust the conference date and time as needed to match invitee and device availability.
 - a Review the **Call Info** column to ensure that each invitee has the required endpoint. As needed, select **Edit** for the invitee and change the **Call Info** including how the invitee will join the conference.

Notes

- When an invitee is shown as attending **In Person**, you may want to ask your ReadManager system administrator to manually associate a device with the SE200 user record for that invitee. Then return to this procedure and select that device for the invitee.
- You can also specify call information for **In Person** invitees manually.

- » For invitees with audio endpoints, set the **Dial Type** setting to IP or ISDN as appropriate.
- » For invitees with video endpoints, set the **Bit Rate** and **Dial Options** settings. (You can change the connection speed for an endpoint up to the speed set by the meeting template.)
- » For invitees who are shown as attending **In Person**, as needed, set the method to **Dial Out** and enter the invitee's number.

- b Click **OK**.

- 11 In the **Conference Resources**, set these meeting features:
 - a For an **Audio Only** meeting, check and change the **Conference Type**.

The **Default Template** changes to the default audio template.

Note

When you create an **Audio Only** conference, the conference is automatically identified as **Dial-In** and requires an MCU.

- b** To select a template other than the default, click **Default Template** and select another template from the list.

Notes

- A meeting template is a collection of settings that the ReadManager system stores. When you schedule a meeting, the **Default Template** is selected. If your ReadManager system administrator created other templates for your use, you may select a different template to offer invitees a different meeting experience.
- If you have advanced scheduler role and permissions, you see **Edit Conference Settings**. For information about advanced scheduler capabilities, see [“Applying Advanced Conference Settings to ReadManager® System Meetings”](#) on page 3-1.

12 Once you’ve added your invitees, you can them leadership roles:

- a** To assign an invitee as lecturer, in the **Lecturer** field select an invitee’s name from the list.
- b** To assign an invitee as video chairperson, in the **Video Chairperson** field select an invitee’s name from the list.

13 From the action bar, set delivery and notification options as you do for a Lotus Notes meeting.

14 From the action bar, click **Save and Send Invitations**.

If the system warns you about scheduling problems, resolve them now. Typical problems involve unavailable endpoints, unavailable rooms, or insufficient bandwidth.

The ReadManager system verifies that bandwidth and other video resources are available and reserves them.

Lotus Notes adds the meeting to the **Calendar**, marks the specified time busy in the chair's **Free Time** schedule, and sends an invitation to each invitee. The invitation shows the endpoint that the invitee should use and the dial-in number and PIN. Invitees who want to use another video endpoint should contact you or the ReadManager operator to modify their meeting settings.

Edit a Scheduled Meeting

You can edit scheduled (future) meetings. You cannot edit past or active meetings.

If you edit a recurring meeting, the changes apply to all future meeting instances but not to past or ongoing meeting instances. And if you change one instance of a recurring meeting, you can no longer change the start time, end time, recurrence pattern, and recurrence range for the series as a whole. If you do make such changes, the old series is completely removed and replaced with the newly defined series. Any prior changes are lost.

To edit a scheduled meeting

- 1 Open your **Lotus Notes Calendar**. (See [Open Your ReadManager System Database](#).)
- 2 Double-click the meeting of interest.
The **Calendar Entry Video Meeting** window opens and the standard Lotus Notes scheduling form includes the ReadManager system scheduling form.
- 3 If you used a template other than the default when you created the meeting, reapply the new template.
- 4 Make the required changes to the meeting. See [“Schedule a ReadManager System Video Meeting”](#) on page 2-2 for information on these forms.
- 5 Click **Save and Send Invitations**.

The ReadManager system changes required resources as needed.

Applying Advanced Conference Settings to ReadManager[®] System Meetings

This chapter describes how a user with advanced scheduler permissions can edit some ReadManager system conference settings.

Advanced Conference Settings


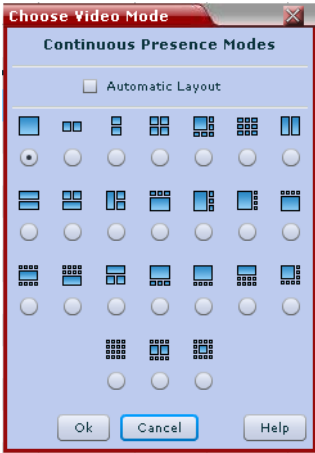
Users with advanced scheduler permissions can overwrite certain conference template settings as described here. However, be aware when doing so that two conferences scheduled with the same template may have different settings and behavior if they land on different types of MCUs. If you have an environment with mixed MCU types (e.g., with both MGC and RMX 2000 devices), and the conference you schedule lands on the RMX 2000 platform, the settings you specify here will be over ridden by the RMX profile.

A profile is a collection of advanced conference settings that reside on the MCU (MGC or RMX). Only an RMX profile can override conference template settings. For more information about conference templates, profiles, and your conferencing configuration, contact your ReadManager administrator.

Note

If you do not see **Edit Conference Settings** in the **Conference Resources** section, you do not have access to these advanced settings.

Setting	Description
Conference Password	The system assigns a four-digit Conference Password and provides this password to participants within the content of the conference notification email. You can change this password to another four-digit number.

Setting	Description
Enable Chairperson	You can select a video chairperson to control the conference from his or her video endpoint. The video chairperson must have a video endpoint and Chairperson conferences require an MCU.
Chairperson Password	If you selected Enable Chairperson, enter a four-digit password that the video chairperson must enter at their endpoint to assume control. The ReadManager system sends a separate email with this password to the video chairperson. It is not included in the conference notification email.
Dial Options	<p>You have three options:</p> <ul style="list-style-type: none"> To create a conference for which dial information and a PIN code are assigned to all conference participants, use the Dial-In setting. This setting allows any audio or video endpoint to dial in, and all participants can connect to the same conference on the MCU. To dial out to all participants in the conference, use the Dial-Out setting. To allow participants both options, select Dial-In+Dial-Out. <p>Note When you change a conference from Dial-In to Dial In+Dial Out, the selected resources remain set to Dial-In. You must change them manually.</p>
Always Use MCU	This setting forces the conference to an MCU and prevents video endpoints from connecting to each other directly. This setting is the default when Audio Only is the conference type.
Video Mode	<p>Determines the initial screen layout on an endpoint's monitor for a multipoint conference that requires an MCU. The options are:</p> <ul style="list-style-type: none"> Switching.  Indicates that the display changes each time the speaker changes, and everyone sees the current speaker. Continuous Presence. Displays several panels on the screen, each showing a different participant, and allows you to see all meeting participants at once. You can select a specific layout, with a certain number of windows open. Each panel requires a different port. <div data-bbox="821 1318 1133 1768" style="text-align: center;">  </div> <ul style="list-style-type: none"> Automatic Layout is a continuous presence layout, in which the number of participants determines the number of panels and required ports.

Setting	Description
Bit Rate	<p>Specifies the connection speed for the endpoint. If you select a higher speed than an endpoint can support, the speed for that endpoint is reduced; however, the conference uses the default connection speed for endpoints that can match it. If you place the calls through an endpoint with an embedded MCU, the behavior depends on the capabilities of that device.</p> <p>When the dial speed is higher than the number of channels defined in the H.320 service for the endpoint, you receive a warning. To continue, lower the dial speed to less than or equal to the ISDN capability of the endpoint.</p> <p>Higher speed is important for high-quality video in a meeting. Because higher speeds use greater bandwidth, scheduling a high-bandwidth meeting may limit the number of conferences that you can reserve at one time.</p> <p>Note</p> <p>The bit rate in the RMX profile takes precedence over the bit rate in the conference template.</p>
People + Content	<p>Controls the ability for one endpoint to send two types of data—a data stream and a video stream—over the same bandwidth to display people and content. The receiving endpoint handles the two video streams differently and may display on separate screens or through the video switching mode.</p> <p>Endpoints that do not support the selected method connect with either video through IP or audio only through ISDN.</p> <p>Select from these available settings:</p> <ul style="list-style-type: none"> • None. Select this option when dual data streams are not required. • People +Content. This Polycom proprietary technology works with most Polycom endpoints. • People and Content VO. This Polycom proprietary technology works with PictureTel endpoints. Select this option for older endpoints. • Visual Concert PC. Select this option for use with Polycom ViewStation MP/512/SP/323 endpoints. • Visual Concert FX. Select this option for use with Polycom ViewStation FX/EX and VS4000 endpoints. • Duo Video. This setting supports IP and ISDN and is available with Tandberg endpoints, in which one part of the conference is set as the video conference and the other as the presentation conference. <p>Notes:</p> <ul style="list-style-type: none"> • Not supported on RMX devices. • The MGC requires that conferences with People + Content use a minimum speed of 192 K.

Setting	Description
T.120 Mode	<p>Selects the protocols and specifications for multipoint data communication.</p> <p>From the T.120 menu, select the speed for the T.120 connection. See your IT department to determine the best combinations for your conferences. To disable the T.120 mode, select None.</p> <p>If you select T.120, these options may be available, according to the participant's endpoint and software:</p> <ul style="list-style-type: none"> • Application Sharing. Allows two or more participants to work on the same document or application, even when only one participant has the application. In application sharing, one participant launches the application, and it runs simultaneously on all other computers. • File Transfer. Enables participants to send files to each other. • Chat or Whiteboard. Allows participants to communicate with each other by writing. <p>In all of these modes, participants can view and hear each other.</p>

Edit Conference Settings

You can only edit conference settings for scheduled conferences. You cannot edit conference settings for active conferences.

To edit the conference settings

- 1 Open your **Lotus Notes Calendar**.
- 2 Create or select a video meeting.
- 3 On the **Video Resources** tab, click **Edit Conference Settings**.

The **Conference Settings** dialog box appears. For information on these settings, see "[Advanced Conference Settings](#)" on page 3-1.



- 4 Make the required changes to the settings and click **OK**.

Index

A

- advanced conference settings 3-1
- Advanced Settings
 - Chair Person Control 3-2
- always use MCU setting 3-2

B

- bandwidth
 - see* connection speed 3-3
- bit rate setting 2-3

C

- Chair Person Control 3-2
- chairperson 2-4
 - password 3-2
- changing a meeting 2-5
- conference
 - password 3-1
 - setting connection speed 3-3
 - settings, advanced 3-1
- connection speed, setting 3-3

D

- data stream (with video) 3-3
- delivery options for meeting invitations 2-4
- dial
 - options 2-3
- dial options
 - specifying for a conference 3-2
- dial type setting
 - setting
 - dial type 2-3
- dial-in option 3-2
- dial-out option 3-2
- dial-out setting
 - setting
 - dial-out 2-3

E

- edit advanced conference settings 3-4

F

- forcing MCU usage 3-2

I

- installing the ReadManager plugin 1-1
- invitation delivery options 2-4
- inviting people to a meeting 2-2

L

- lecturer 2-4
- location for a meeting 2-3
- logon settings 1-2
- Lotus Notes calendar
 - opening 2-1

M

- MCU
 - forcing usage 3-2
- meeting information
 - invitees 2-2
 - location 2-3
 - resources 2-3
 - subject 2-2
- meetings
 - changing information about 2-5
 - scheduling 2-2-2-4
 - setting to recurring 2-2
- mode
 - video 3-2
- modifying a meeting 2-5
- multipoint calls
 - setting
 - video mode 3-2

O

- opening the calendar 2-1
- options
 - dial 2-3

P

password

- chairperson 3-2
- conference 3-1

People + Content 3-3

plugin. *See* ReadiManager plugin

R

ReadiManager plugin

- determining version of 1-3
- installing 1-1
- logon settings for 1-2
- recurring meetings 2-2
- resources for a meeting 2-3

S

scheduling a meeting 2-2-2-4

setting

- always use MCU 3-2
- bit rate 2-3

settings

dial options 3-2

logon 1-2

settings, advanced conference 3-1

software version 1-3

subject of a meeting 2-2

switching

video mode 3-2

T

T.120 3-4

V

version of ReadiManager 1-3

video

chairperson 2-4

switching 3-2

video meetings. *See* meetings

video mode 3-2

continuous presence 3-2

switching 3-2