

ReadiManager®

Scheduling Guide for Microsoft® Outlook®



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Setting Up the RediManager[®] Scheduling Plugin

This chapter describes how to install and set up the RediManager[®] Scheduling Plugin for Microsoft[®] Outlook[®]. It includes these topics:

- [“Install the RediManager Scheduling Plugin”](#) on page 1-1
- [“Set Up a RediManager System Calendar”](#) on page 1-2
- [“Configure How the RediManager System Tracks Attendee Responses”](#) on page 1-3
- [“View or Update Your RediManager System Logon Settings”](#) on page 1-4
- [“View the RediManager Scheduling Plugin Version”](#) on page 1-4
- [“Uninstall the RediManager Scheduling Plugin”](#) on page 1-5

Install the RediManager Scheduling Plugin

To install the RediManager Scheduling Plugin for Outlook you need:

- Microsoft Outlook 2000 SR-1 or later or Outlook 2003 SP2 or later
- An internet browser
- Adobe[®] Flash[®] Player 9.x (available at www.adobe.com)
- The IP address of the RediManager SE200 network appliance and your username, password, and domain. See your RediManager system administrator for this information.

To install the RediManager Scheduling Plugin for Outlook

- 1 Open a browser and in the **Address** field enter the RediManager SE200 appliance IP address.
- 2 When the RediManager 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 the **Polycom ReadiManager Outlook Plugin**.
- 7 Ensure that Microsoft Outlook is closed.
- 8 Save the file to your local computer, then double-click the file to run it.
- 9 Close the ReadiManager SE200 **Downloads** screen and click **Log Out**.

Set Up a ReadiManager System Calendar

To schedule ReadiManager system meetings, you must first set up a ReadiManager system calendar. You can either associate the ReadiManager system calendar with your existing Microsoft Outlook system calendar or keep two separate calendars.

Note

Microsoft Outlook tracks attendee responses only to meetings scheduled on the Outlook system calendar. If you keep two separate calendars, Microsoft Outlook cannot track responses to meetings scheduled on the ReadiManager system calendar.

To associate a ReadiManager system form with your existing calendar

- 1 Open **Microsoft Outlook**.
- 2 Right-click the **Calendar** icon and select **Properties**.
The **Calendar Properties** dialog box opens at the **General** tab.
- 3 From the **When posting to this folder, use** drop-down list, select **ReadiManagerMeeting** and click **OK**.

To create a separate ReadiManager system calendar

- 1 Open **Microsoft Outlook**.
- 2 Select **File > New > Folder**.
The **Create New Folder** dialog box appears.
- 3 In the **Name** field, enter a new calendar name (example: Video Calendar).
- 4 From the **Folder contains** drop-down list, select **Calendar Items** and click **OK**.

- 5 From the Microsoft Outlook toolbar, select **Tools > Forms > Choose Form**.

The **Choose Form** dialog box appears.

- 6 From the **Look In** drop-down list, select **User Templates in File System** and click **Browse**.

- 7 Browse to **Program Files > Polycom > Polycom Scheduler Outlook Plug-in** and click **OK**.

- 8 Select **ReadiManagerMeeting** and click **Open**.

- 9 From the Microsoft Outlook toolbar, select **Tools > Forms > Publish Forms**.

The **Publish Forms** dialog box appears.

- 10 Click **Browse** and, from the **Look In** drop-down list, select the calendar that you created in step 3.

- 11 In the **Display Name** field, enter a new form name and click **Publish**.

- 12 Close the **Appointment Calendar** screen and click **No**.

- 13 Right-click the new **Calendar** icon and select **Properties**.

The **Calendar Properties** dialog box opens at the **General** tab.

- 14 From the **When posting to this folder use** drop-down list, select the form that you created in step 11 and click **OK**.

Configure How the ReadManager System Tracks Attendee Responses

Microsoft Outlook automatically tracks attendee responses to ReadManager system meeting requests as it does other meeting requests, by displaying response emails.

By default, the ReadManager system also automatically tracks attendee responses when Microsoft Outlook displays response emails. However, this automatic response tracking requires interaction with the ReadManager system and may change the meeting information.

Two configuration settings control attendee tracking:

- **Accept/Decline Auto Tracking.** Use this setting to turn off automatic response tracking in the ReadManager system. Microsoft Outlook continues to automatically track responses, but the ReadManager system does not.

- **Send Update on Accept/Decline Processing.** If you select **Accept/Decline Auto Tracking**, use this setting to choose whether or not, when processing of accept/ decline responses causes meeting dial information to change, the ReadiManager system should send updates to attendees with the new dial information.

To configure ReadiManager system auto-tracking

- 1 From the Microsoft Outlook toolbar, click **Video**.
- 2 Check (to accept) or uncheck (to decline) **Accept/Decline Auto Tracking**.
- 3 If you accepted auto-tracking in step 2, check (to send) or uncheck (to refrain from sending) **Send Update on Accept/Decline Processing**.

View or Update Your ReadiManager System Logon Settings

The ReadiManager system administrator set up a username and password for you. The installation wizard configures this information, but you can view and update it.

To view or update your logon settings

- 1 From the Microsoft Outlook toolbar, select **Video > Logon Settings**.
The ReadiManager **Logon Settings** dialog box opens.
- 2 View and, as needed, update the settings.
- 3 Click **Save**.

View the ReadiManager Scheduling Plugin Version

If you encounter difficulties scheduling meetings through Microsoft Outlook, you may need to determine the ReadiManager Scheduling Plugin version.

To view the ReadiManager Scheduling Plugin version

- >> From the Microsoft Outlook toolbar, select **Video > About ReadiManager**.

The **About** dialog box displays the version number.

Uninstall the ReadManager Scheduling Plugin

If you uninstall the ReadManager Scheduling Plug-in for Microsoft Outlook, you must restore the default calendar form. You should also remove the ReadManagerMeeting form.

To uninstall the ReadManager scheduling plugin

>> Follow normal uninstall procedures within **Control Panel > Add or Remove Programs**.

To restore the default calendar form and remove the ReadManagerMeeting form

- 1** Right-click the **Calendar** icon and select **Properties**.
The **Calendar Properties** dialog box opens.
- 2** In the **General** tab, from the **When posting to this folder, use** drop-down list, select **Appointment**.
- 3** In the **Forms** tab:
 - a** Select **ReadManagerMeeting** and click **Manage**.
The **Forms Manager** dialog box opens.
 - b** Select **ReadManagerMeeting** and click **Delete**. Click **Yes** to confirm the deletion.
 - c** Click **Close**.
- 4** Click **OK**.

Scheduling ReadManager[®] System Meetings

This chapter describes how to use the ReadManager Scheduling Plug-in. It includes these topics:

- [“Schedule a ReadManager System Video Meeting”](#) on page 2-1
- [“Edit a Scheduled Meeting”](#) on page 2-4

In addition to these procedures, the ReadManager system supports all the standard Microsoft Outlook procedures for rescheduling and canceling meetings. For information on these procedures, see the Microsoft Outlook online help.

Schedule a ReadManager System Video Meeting

To edit a ReadManager system video meeting

- 1 Open your Microsoft Outlook or ReadManager system calendar.

Note

Microsoft Outlook tracks attendee responses only for meetings scheduled on the Outlook system calendar. If you keep two separate calendars, Microsoft Outlook cannot track responses for meetings scheduled on the ReadManager system calendar.

- 2 From the Microsoft Outlook toolbar, click **Actions** and select **New ReadManager Meeting**.

Note

Do not select **Plan a Meeting**. It does not use the ReadManager system.

A **ReadManagerMeeting** form appears.

- 3 On the **Appointment** tab, select **Actions > Invite Attendees** and add names.
 - To add attendees from within your system domain, click **To** and in the **Select Attendees and Resources** dialog box, select required attendees, optional attendees, and rooms.
 - To add guest attendees (attendees from outside your system domain), enter their email addresses.

As you add attendees and rooms, they appear in the **Video Resources** tab (described in step 9).
- 4 Enter a meeting name in the **Subject** and set a meeting **Start Time** and **End Time**.
- 5 To make the meeting recurring:
 - a Click **Recurrence** and in the **Appointment Recurrence** dialog box, set:
 - » Recurrence frequency (**Daily**, **Weekly**, or **Monthly**)

Notes

- Once you schedule a meeting, you cannot later change whether the meeting is nonrecurring or recurring.
- The ReadManager system does not support a recurrence frequency of **Yearly** or a recurrence range of **No End Date**.

- » Number of meeting occurrences (**Start** date and either total number of occurrences or **End by** date)

The maximum number of recurrences is 52.

- b Click **OK**.
- 6 Click **Scheduling** to view attendee availability. Microsoft Outlook tracks attendee availability.
- 7 Click **Video Resources** to view device availability. The ReadManager system tracks device availability.
- 8 Adjust the conference date and time as needed to match attendee and device availability.
- 9 Check **Use ReadManager** and, as necessary, 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 attendees a different meeting experience.
- If you have advanced scheduler role and permissions, you see the **Edit Conference Settings** button. For information about advanced scheduler capabilities, see [“Applying Advanced Conference Settings to ReadManager® System Meetings”](#) on page 3-1.

- c** Review the **Call Info** column to ensure that each attendee has the required endpoint. As needed, select **Edit** for the attendee and change the **Call Info** including how the attendee will join the conference.

Notes

- When an attendee 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 attendee. Then return to this procedure and select that device for the attendee.
- You can also specify call information for **In Person** attendees manually.
- By default, guest attendees are shown as attending **In Person**.

- » For attendees with audio endpoints, set the **Dial Type** setting to IP or ISDN as appropriate.
- » For attendees 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 attendees who are shown as attending **In Person**, as needed, set the method to **Dial Out** and enter the attendee’s number.

- d** Click **OK**.

10 Once you’ve added your attendees, you can assign them leadership roles:

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

Notes

- If the **Lecturer** or **Video Chairperson** features are not available, then the selected template does not support these features.
- To be assigned **Lecturer**, the attendee must have a manageable video device.

11 Click **Send**.

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

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

Microsoft Outlook adds the meeting to the appropriate calendar and sends an invitation to each attendee. The invitation shows the endpoint that the attendee should use and the dial-in number and PIN. Attendees who want to use another video endpoint should contact you or the ReadiManager system operator to modify their meeting settings.

Edit a Scheduled Meeting

You can edit scheduled (future) meetings. You cannot edit past or active meetings. Also, you cannot change:

- A non-recurring meeting to a recurring meeting or a recurring meeting to a non-recurring meeting
- A Microsoft Outlook audio meeting to a ReadiManager video meeting or a ReadiManager video meeting to a Microsoft Outlook audio meeting

If you edit a recurring meeting, the changes apply to all future meeting instances but not to past or ongoing meeting instances.

Caution

If you edit one instance of a recurring meeting and later edit the entire series of meetings, the change that you made to the one instance may be lost.

To edit a scheduled meeting

- 1 Open your Microsoft Outlook or ReadiManager system calendar.
- 2 Double-click the meeting of interest.
The **ReadiManagerMeeting** screen appears.
- 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.
- 5 Click **Save and Close** or **Send Update**.

The ReadiManager system changes required resources as needed.

Applying Advanced Conference Settings to RediManager[®] System Meetings

This chapter describes how a user with advanced scheduler permissions can edit some RediManager 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 RediManager 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="820 1318 1133 1766" data-label="Image"> </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>

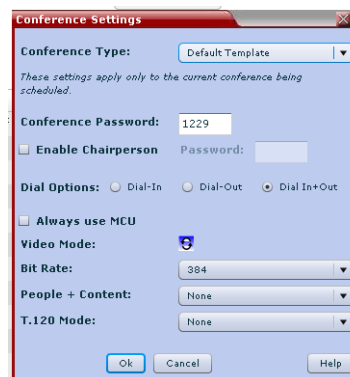
Edit Conference Settings

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 Microsoft Outlook or ReadManager system calendar.
- 2 Create or select a video meeting.
- 3 Click the **Video Resources** tab.
- 4 Click **Edit Conference Settings**.

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



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

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