



▶ Polycom Scheduling Guide for  
IBM® Lotus® Notes®

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# Setting Up the Polycom<sup>®</sup> Scheduling Plugin for IBM<sup>®</sup> Lotus<sup>®</sup> Notes<sup>®</sup>

This chapter describes how to install and set up the Polycom<sup>®</sup> Scheduling Plugin for IBM<sup>®</sup> Lotus<sup>®</sup> Notes<sup>®</sup>, which connects to the Polycom video conferencing management and scheduling system. It describes how to:

- [Install the Scheduling Plugin for Lotus Notes](#)
- [Create the Lotus Notes Scheduling Database](#)
- [Enter the Video Conferencing System Logon Settings](#)
- [View the Scheduling Plugin Version](#)

## Install the Scheduling Plugin for Lotus Notes

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

- The release notes for your Polycom CMA system to identify the system requirements for the plugin.
- Adobe<sup>®</sup> Flash<sup>®</sup> Player 9.x or 10.0.x for Microsoft Internet Explorer (available at [www.adobe.com](http://www.adobe.com))
- The IP address of a Polycom<sup>®</sup> Converged Management Application<sup>™</sup> (CMA) system and your username, password, and domain for the system. If the Polycom CMA system is integrated with your company's enterprise directory, these may be your network credentials. See your system administrator for this information.
- To configure the **Standards and formats** and in some cases the **Language for non-Unicode programs** sections of the operating system's **Regional and Language Options** dialog box for your local language.

### To install the Scheduling Plugin for Lotus Notes

- 1 Open a browser and in the **Address** field enter the IP address of the video conferencing system.
- 2 When the video conferencing system login screen appears, enter your **Username** and **Password**.
- 3 If necessary, select a different **Language** or **Domain**.
- 4 Click **Login**.
- 5 From the video conferencing system toolbar, click **Downloads**.
- 6 Click **Polycom Scheduling Plugin for IBM Lotus Notes**.
- 7 In the index directory, click the **CMA\_mail8\_xx-XX.ntf** file where **xx-XX** is the template file for your language choice.
- 8 Save the file to the C: \Documents and Settings\- 9 Close the downloads screen and click **Log Out**.

## Create the Lotus Notes Scheduling Database

You can either design a new database with the **CMA\_mail8\_xx-XX** 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 Lotus Notes scheduling database

- 1 Open **Lotus Notes**.
- 2 Select an existing application.
- 3 Select **File > Database > New**.  
The **New Database** dialog box opens.
- 4 Enter a **Title** for the new meeting database.  
This name becomes the **File name** for the Lotus Notes database file.
- 5 Enable the **Show advanced template** option.  
This shows all the available templates in the template list.
- 6 From the **Template** list, select **CMA\_mail8\_xx-XX**. (where **xx-XX** is the template file for your language choice).
- 7 Click **OK**.  
Your **Lotus Notes Mail - Inbox** opens.

## Enter the Video Conferencing System Logon Settings

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

### To enter your video conferencing 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 scheduling plugin.
- 4 If the video conferencing management system is operating in secure mode, select the **Use Https** option.
- 5 If you selected the **Use Https** option, to prevent certificate errors:
  - a Open a Microsoft Internet Explorer browser window.
  - b In secure mode (https://) in the **Address** field enter the Polycom CMA system server IP address or DNS name.
  - c In the **HTTPS Security Alert** page, click **View Certificate**.
  - d In the **General** tab of the **Certificate** dialog box, click **Install Certificate**.
  - e When the **Certificate Import Wizard** appears, click **Next**
  - f Click **Next** again, to accept the default setting of **Automatically select the certificate store based on the type of certificate**.  
The wizard indicates that “You have successfully completed the Certificate Import wizard.”
  - g Click **Finish**.  
A **Security Warning** indicates that “You are about to install a certificate from a certification authority claiming to represent: CMA” and asking you “Do you want to install this certificate?”
  - h Click **Yes**.  
The wizard indicates that “You have successfully completed the Certificate Import wizard.”
  - i On your browser tool bar, go to **Tools > Internet Options**.
  - j Select the **Advanced** tab and under the **Security** section, clear the **Warn about certificate address mismatch** setting.
- 6 Click **Save** and close the browser window.

**Note**

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

## View the Scheduling Plugin Version

If you encounter difficulties scheduling meetings through your scheduling plugin, you may need to determine the scheduling plugin version.

**To view the scheduling plugin version**

>> From the **Lotus Notes Calendar**, select **Video > About Polycom Scheduling Plugin**.

A dialog box displays the plugin version number.

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# Scheduling Video Meetings

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

- [Open the Lotus Notes Scheduling Database](#)
- [Schedule a Video Meeting](#)
- [Edit a Scheduled Meeting](#)

In addition to these procedures, the Polycom video conferencing management and scheduling 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 the Lotus Notes Scheduling Database

**To open the Lotus Notes scheduling 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 Lotus Notes Scheduling Database](#)” on page 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 Video Meeting

### To schedule a video meeting

- 1 Open your **Lotus Notes Calendar**. (See [Open the Lotus Notes Scheduling 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 video conferencing system scheduling form.

#### Note

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 8), 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 conferencing system, select rooms 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 video conferencing 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 conferencing system administrator to manually associate a device with the 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 a **Video** conference, you can change the template by clicking **Default Template** and selecting a different template.

**Note**

Conference templates provide default conference settings. When you select a different template, you are changing the default conference settings for your conference.

- b** For an **Audio Only** conference:

**Note**

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

- » Change the **Conference Type** to **Audio Only**.
- » You can change the template by clicking **Default Audio Template** and selecting a different template.

**12** Once you've added your invitees, you can assign 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.

**Notes**

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

**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 video conferencing 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 video conferencing system operator to modify their meeting settings.

## Edit a Scheduled Meeting

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

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

### Note

Once a meeting is scheduled, editing the meeting and selecting a different template does not change the meeting settings. The video conferencing system does not store the template as part of the meeting information, only the settings selected when the meeting was created. To use a different template, you must delete and recreate the meeting.

### To edit a future meeting

- 1 Open your **Lotus Notes Calendar**. (See [Open the Lotus Notes Scheduling Database](#).)
- 2 Double-click the meeting of interest.  
The **Calendar Entry Video Meeting** window opens and the standard Lotus Notes scheduling form includes the video conferencing system scheduling form.
- 3 If you used a template other than the default when you created the meeting, reapply the template.
- 4 Make the required changes to the meeting dates, participants, rooms, or other settings. For information on performing these tasks, see [“Schedule a Video Meeting”](#) on page 6.
- 5 Click **Save and Send Invitations**.

The video conferencing system changes required resources as needed.



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# Advanced Scheduling Operations

This chapter describes how users with advanced scheduler permissions have more options when scheduling conferences using a Polycom video conferencing management system (Polycom® Converged Management Application™ system or ReadManager SE200 system).

## Edit Conference Settings

If you have advanced scheduler permissions, you can overwrite certain conference template settings as described here. However, be careful when doing so. If you have an environment with mixed MCU types (e.g., with both Polycom MGC and Polycom RMX systems), and the conference you schedule is hosted by an RMX system, some of the settings you specify here may be overridden by the RMX profile.

### Notes


- 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 Polycom <Product Name> system administrator.
- Two conferences scheduled with the same template may have different settings and behavior if they land on different types of MCUs.

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

### To edit the conference settings

- 1 On the **Conference Resources** tab, as you are adding or editing a conference, click **Edit Conference Settings**.
- 2 As needed, configure these settings on the **Conference Settings** dialog box. The settings that you can edit may depend on the template selected.

Setting	Description
Conference Password	<p>The system assigns a four-digit <b>Conference Password</b> and provides this password to participants within the content of the conference notification email.</p> <p>You can change this password to another four-digit number.</p>
Enable Chairperson	<p>You can select a video chairperson to control the conference from his or her video endpoint system. The video chairperson must have a video endpoint system and Chairperson conferences require an MCU.</p> <p><b>Notes</b></p> <ul style="list-style-type: none"> <li>• If the conference template has the <b>Conference Requires Chairperson</b> parameter enabled, then <b>Enable Chairperson</b> is automatically selected and cannot be changed.</li> <li>• If a conference is scheduled on an RMX 2000 system and the RMX profile has <b>Conference Requires Chairperson</b> selected but the template does not, and the conference is scheduled without a chairperson, then all users will remain in the waiting room and will not be able to join the conference.</li> <li>• RMX 1000 systems do not support the <b>Chairperson</b> feature.</li> </ul>
Chairperson Password	<p>If <b>Enable Chairperson</b> is selected, the chairperson must enter this four-digit password at their endpoint to assume control.</p> <p>The system sends a separate email with this password to the video chairperson. It is not included in the conference notification email.</p>
Dial Options	<p>You have three options:</p> <ul style="list-style-type: none"> <li>• To create a conference for which the same dial-in information and a PIN code are assigned to all conference participants, use the <b>Dial-In</b> setting. This setting allows participants to dial in from an audio or video endpoint and connect to the same conference on the MCU.</li> <li>• To dial out to all participants in the conference, use the <b>Dial-Out</b> setting.</li> <li>• To allow participants both options, select <b>Dial-In+Dial-Out</b>.</li> </ul> <p><b>Note</b></p> <p>When you change a conference from <b>Dial-In</b> to <b>Dial In+Dial Out</b>, the selected resources remain set to <b>Dial-In</b>. You must change them manually.</p>

Setting	Description
Always Use MCU	This setting forces the conference to an MCU and prevents video endpoints from connecting to each other directly. This setting is automatically selected and cannot be changed when <b>Audio Only</b> is the conference type or when <b>Enable Chairperson</b> is selected.
Video Mode	<p>Determines the initial layout on a video endpoint's monitor for a multipoint conference that requires an MCU. The options are:</p> <ul style="list-style-type: none"> <li>• <b>Switching.</b>  Indicates that the display changes each time the speaker changes, and everyone sees the current speaker.</li> <li>• <b>Continuous Presence.</b> Displays several panels on the monitor, 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.</li> <li>• <b>Automatic Layout</b> is a continuous presence layout, in which the number of participants determines the number of panels.</li> </ul>
Bit Rate	<p>Specifies the maximum connection speed for endpoints in the conference. Individual endpoints that specify a lower connection speed connect at that lower speed. Endpoints that specify a higher connection speed connect at the speed identified in the conference template.</p> <p>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 endpoint.</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><b>Note</b></p> <p>The bit rate can be set at the network level, the device level, and the conference level. If there is a discrepancy between these bit rate settings, the system implements the lowest bit rate setting. The only exception, is that the bit rate in the RMX profile takes precedence over the bit rate in the conference settings.</p>

Setting	Description
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"> <li>• <b>None.</b> Select this option when dual data streams are not required.</li> <li>• <b>People +Content.</b> This enables the industry standard H.239 dual streams for endpoints that support H.239 or the Polycom proprietary People+Content dual streams for older Polycom endpoints without H.239 capabilities.</li> <li>• <b>People and Content VO.</b> This Polycom proprietary technology works with PictureTel endpoints. Select this option for older endpoints.</li> <li>• <b>Visual Concert PC.</b> Select this option for use with Polycom ViewStation MP/512/SP/323 endpoints.</li> <li>• <b>Visual Concert FX.</b> Select this option for use with Polycom ViewStation FX/EX and VS4000 endpoints.</li> <li>• <b>Duo Video.</b> 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.</li> </ul> <p><b>Note</b></p> <p>The MCU requires that conferences with People + Content use a minimum speed of 192 K.</p>
T.120 Mode	<p>Selects the protocols and specifications for multipoint data communication.</p> <p>In the <b>T.120</b> 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 <b>None</b>.</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"> <li>• <b>Application Sharing.</b> 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.</li> <li>• <b>File Transfer.</b> Enables participants to send files to each other.</li> </ul>

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Setting	Description
T.120 Mode	<ul style="list-style-type: none"><li data-bbox="786 323 1406 380">• <b>Chat or Whiteboard.</b> Allows participants to communicate with each other by writing.</li></ul> <p data-bbox="786 390 1406 447">In all of these modes, participants can view and hear each other.</p> <p data-bbox="786 457 846 485"><b>Note</b></p> <p data-bbox="786 495 1349 522">This setting applies to MGC-hosted conferences only.</p>

**3** Click **OK**.



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