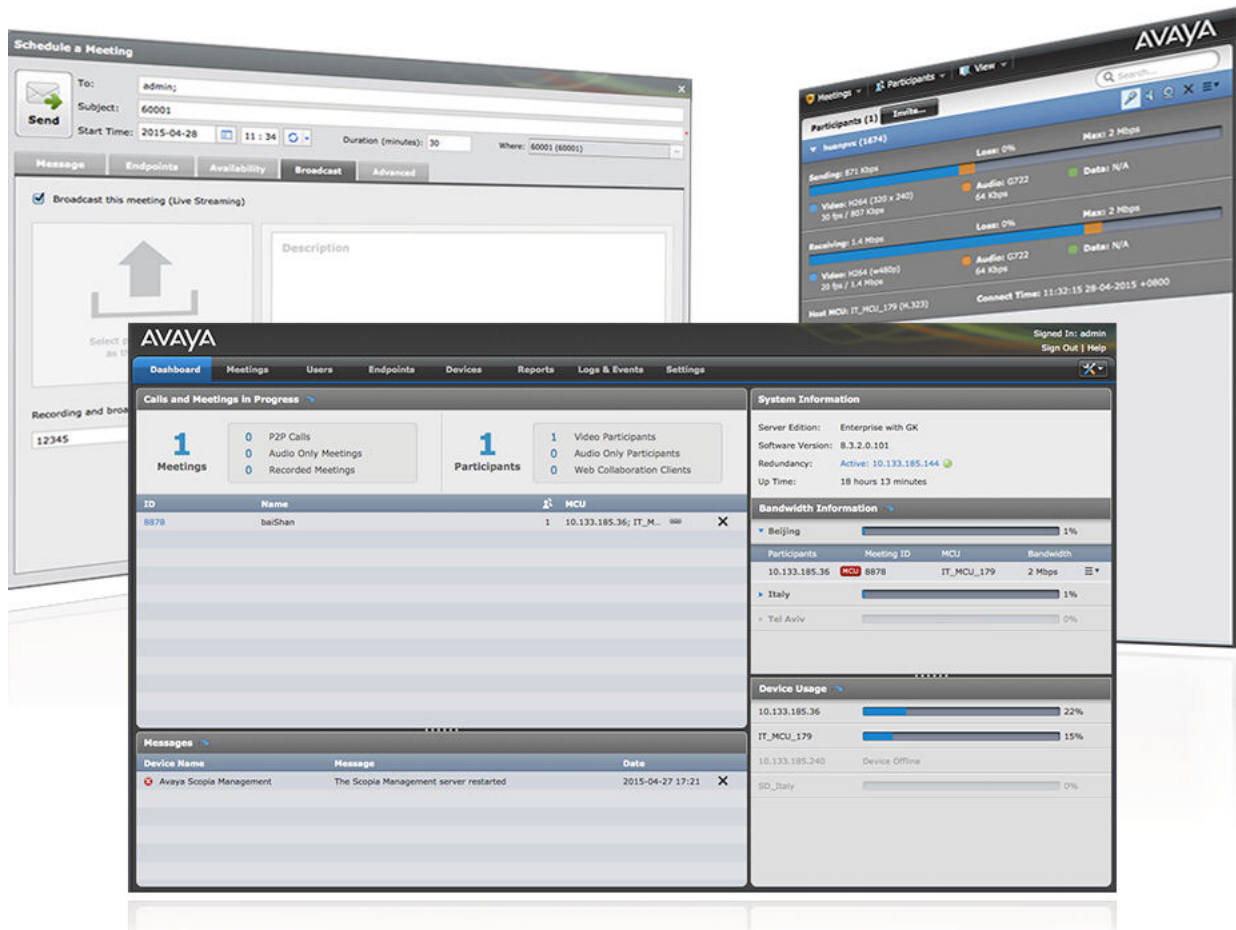




Avaya Scopia® Add-in for Microsoft Outlook User Guide



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Chapter 1: About Scopia® Add-in for Microsoft Outlook

The Scopia® Add-in for Microsoft Outlook is a plug-in that allows users to schedule, modify, cancel, and configure videoconferences using Microsoft Outlook.

You can schedule a meeting in one of the following ways, depending on the permissions defined by your administrator for your user profile:

- Schedule a meeting without reserving resources (see [Scheduling a Videoconference Without Reserving Resources](#) on page 15 for more information). This options suits starting ad-hoc, instant meetings, but has the risk of not having enough bandwidth or available ports on the video network devices to hold your videoconference in high quality.
- Schedule a meeting and reserve the required video network resources (see [Scheduling a Videoconference and Reserving Network Resources](#) on page 16 for more information). This ensures your meeting has the enough resources to deliver quality videoconferencing. You can also modify advanced meeting settings, such as whether to record the meeting, and using a meeting PIN to restrict access.

Related Links

[About Plug-ins for Microsoft Deployment](#) on page 5

About Plug-ins for Microsoft Deployment

Users can either schedule a meeting in advance, and reserve the required video network resources, or they can start an instant meeting. Scheduling meetings with resources ensures a high quality user experience. If there are not enough resources during the videoconference, the system may either downgrade the video quality or block additional participants from joining.

The most common way to start a videoconference in Microsoft Environment is by using one of the following plug-ins (add-ins):

- Scopia® Add-in for Microsoft Outlook for 32 bit Windows
- Scopia® Add-in for Microsoft Outlook for 64 bit Windows
- Scopia® Plug-in for Microsoft Exchange

The choice of the plug-in to deploy depends on the desired functionality and the version of Windows used in the solution. This choice is made at the organization level. As [Figure 1: Scheduling with](#)

[plug-ins for Microsoft Environment](#) on page 6 shows, all three plug-ins allow users to reserve a meeting room and slots in calendars of invited people (just like in a regular Outlook invitation) and to use the invitation text with links to the videoconference.

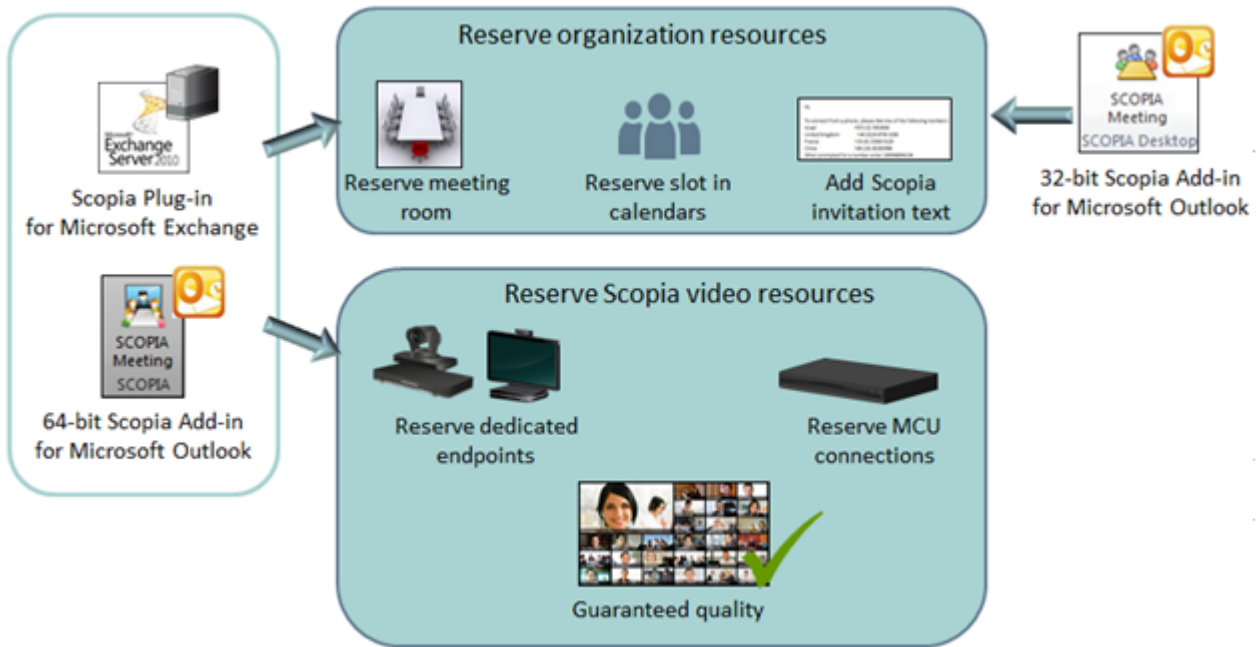


Figure 1: Scheduling with plug-ins for Microsoft Environment

Scopia® Add-in for Microsoft Outlook (32 bit) works only with Scopia® Desktop server and is limited to reserving organization resources. Users cannot reserve endpoints or MCU ports using this plug-in.

When scheduling using either Scopia® Add-in for Microsoft Outlook (64 bit) or Scopia® Plug-in for Microsoft Exchange, in addition to reserving organization resources, users reserve video network resources such as endpoints and MCU connections.

Related Links

[About Scopia® Add-in for Microsoft Outlook](#) on page 5

Chapter 2: Installing Scopia® Add-in for Microsoft Outlook

This section includes information about how to install Scopia® Add-in for Microsoft Outlook:

Related Links

[System Requirements](#) on page 7

[Installing Scopia® Add-in for Microsoft Outlook](#) on page 8

[Uninstalling Scopia® Add-in for Microsoft Outlook](#) on page 12

System Requirements

The following is required for your Scopia® Add-in for Microsoft Outlook to work properly:

- One of the following Microsoft Outlook versions:
 - Microsoft Outlook 2007 (32bit/64bit)
 - Microsoft Outlook 2010 (32bit/64bit)
 - Microsoft Outlook 2013 (32bit/64bit)
- Microsoft Exchange 2007/2010 Server on your network
- A dedicated email account for receiving meeting messages including meeting accept and decline messages.
- A connection to the organization's network. To access Scopia® Add-in for Microsoft Outlook from a public network, you need to log in using a VPN connection.
- To schedule meetings with Scopia® Add-in for Microsoft Outlook, your user profile in Scopia® Management must support this capability.

Related Links

[Installing Scopia® Add-in for Microsoft Outlook](#) on page 7

Installing Scopia® Add-in for Microsoft Outlook

About this task

You can install the Scopia® Add-in for Microsoft Outlook in one of the following ways:

- From a link in the Scopia® Management user portal
- From a link in the Scopia® Desktop client
- Using an executable installation file (.exe), received from your administrator

Before you begin

- Verify that you have all the requirements listed in [System Requirements](#) on page 7.
- Verify that you have administrator rights on your computer, required to install Scopia® Add-in for Microsoft Outlook.
- Ask your system administrator for the Scopia® Management URL, required to access Scopia® Add-in for Microsoft Outlook.
- Exit Microsoft Outlook.

Procedure

1. Access the Scopia® Add-in for Microsoft Outlook Installation Wizard in one of the following ways:
 - Ask your administrator for the installation file.
 - Access the Scopia® Management user portal and select **Settings**, and select the link for the Scopia® Add-in for Microsoft Outlook installation.

Preferences

General | **Virtual Room**

Username: admin **Modify Password**

Email: * First Name:

Last Name: * Telephone (Office):

Telephone (Mobile):

Time Zone: ▼ Default Virtual Room: ▼

Location: ▼ Default Meeting Type: ▼

Maximum bandwidth allowed for Scopia Desktop calls	2048 Kbps
Personal Endpoint	None
Recording Policy	Enabled
Groups	None

[Click here to install the Scopia Management Add-in for Microsoft office outlook.](#)

OK **Apply** **Cancel**

Figure 2: Installing Scopia® Add-in for Microsoft Outlook from the Scopia® Management user portal

- Access the Scopia® Desktop client and select **Updates**. Select the Scopia® Add-in for Microsoft Outlook installation option, and select **Install**.

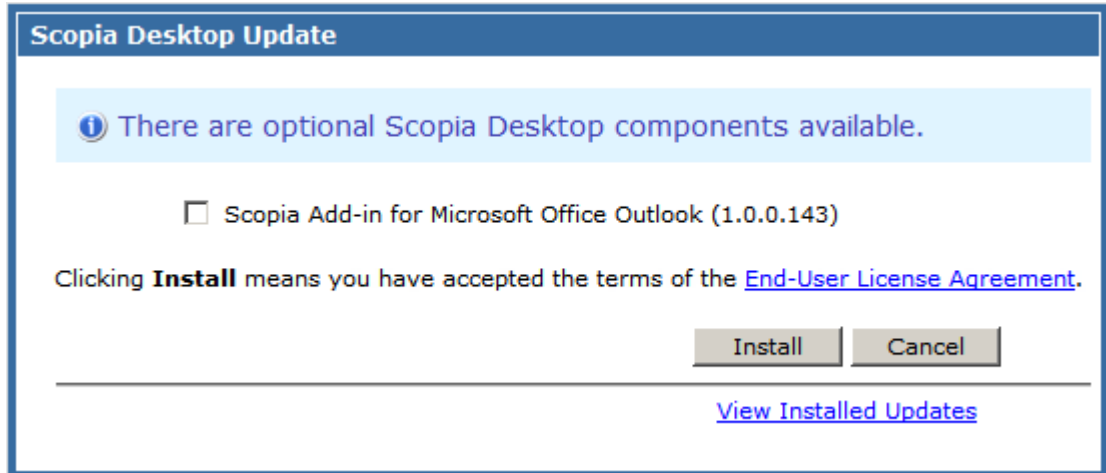
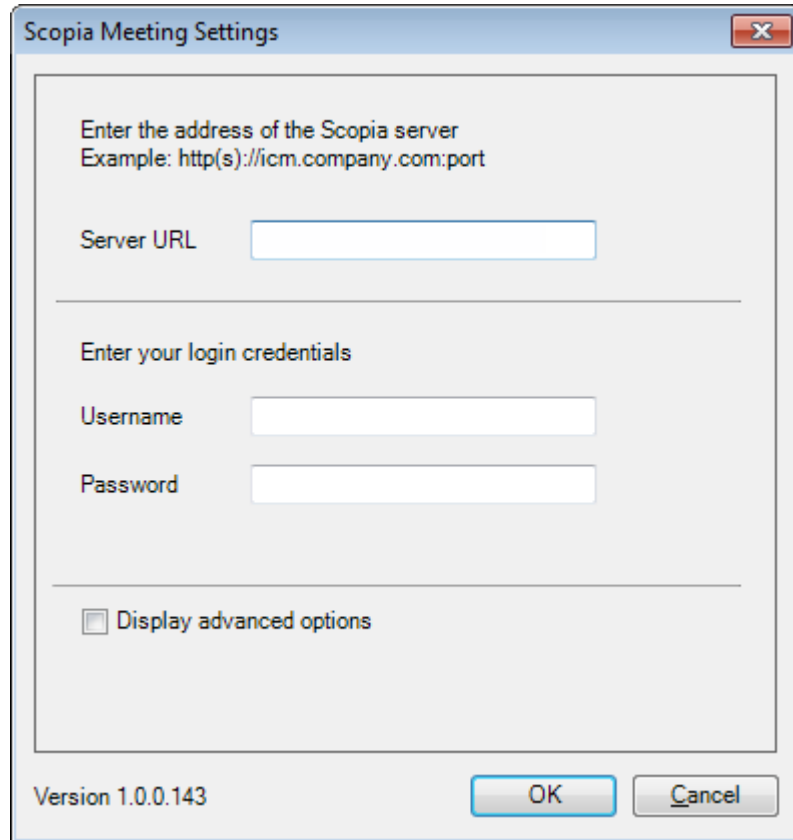


Figure 3: Installing Scopia® Add-in for Microsoft Outlook from the Scopia® Desktop client

2. Open the *scopia_ola.exe* file.

The installation for Scopia® Add-in for Microsoft Outlook begins. When the files are downloaded, the **Scopia® Add-in for Microsoft Outlook Installation Wizard** appears.

3. Select **Next**.
4. Confirm the installation by selecting **Next**.
5. Launch Microsoft Outlook.
6. Select **Add-ins > Scopia Settings** to define settings for Scopia® Add-in for Microsoft Outlook, as described in [Table 1: Setting up Scopia® Add-in for Microsoft Outlook](#) on page 11.



The image shows a Windows-style dialog box titled "Scopia Meeting Settings". It contains the following elements:

- Instruction: "Enter the address of the Scopia server" with an example: "http(s)://icm.company.com:port".
- Text label: "Server URL" followed by an empty text input field.
- Section separator: A horizontal line.
- Instruction: "Enter your login credentials".
- Text label: "Username" followed by an empty text input field.
- Text label: "Password" followed by an empty text input field.
- Section separator: A horizontal line.
- Checkbox: "Display advanced options" (unchecked).
- Footer: "Version 1.0.0.143" on the left, and "OK" and "Cancel" buttons on the right.

Figure 4: Configuring access to the Scopia® Management server

Table 1: Setting up Scopia® Add-in for Microsoft Outlook

Field Name	Description
Server URL	Enter the URL of a Scopia® Management server or a Scopia® Desktop server. It is recommended, if possible, to use a Scopia® Desktop server that is deployed in the DMZ to enable external access.
Username	This is necessary only if your administrator did not set up single sign-on, which allows you to access the Scopia® Add-in for Microsoft Outlook using your Windows credentials. Enter the username and password you use to access the Scopia® Management user portal.
Password	
Display Advanced Options	This is relevant only if your user profile allows you to invite endpoints and reserve video network resources. For more information, contact your administrator. Select to enable advanced options when scheduling meetings, such as inviting endpoints, setting a meeting PIN, selecting a meeting type, and reserving ports. For more information see Scheduling a Videoconference and Reserving Network Resources on page 16.

7. Select **OK**.

To access the Scopia® Add-in for Microsoft Outlook, open Microsoft Outlook and select **Scopia Meeting** from the toolbar.

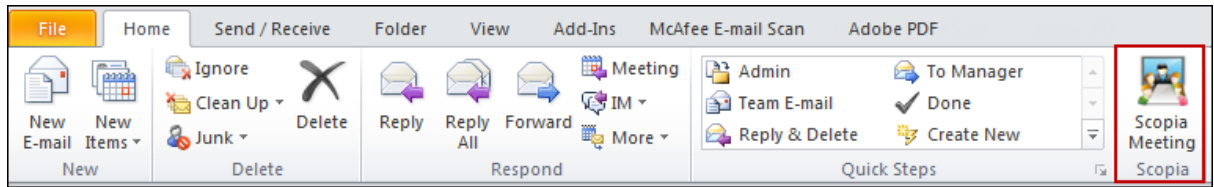


Figure 5: Accessing Scopia® Add-in for Microsoft Outlook

Related Links

[Installing Scopia® Add-in for Microsoft Outlook](#) on page 7

Uninstalling Scopia® Add-in for Microsoft Outlook

About this task

To uninstall Scopia® Add-in for Microsoft Outlook from your computer, find it from the list in **Control Panel > Programs**, and select **Uninstall**.

Related Links

[Installing Scopia® Add-in for Microsoft Outlook](#) on page 7

Chapter 3: Managing Meetings with Scopia® Add-in for Microsoft Outlook

Use your Scopia® Add-in for Microsoft Outlook to manage your videoconferences by:

- Scheduling videoconferences and inviting participants
- Modifying meetings
- Cancelling meetings

Depending on the permissions allowed by your user profile, you can define advanced settings when scheduling the videoconference, such as reserving resources and inviting endpoints.

Related Links

[Scheduling a Videoconference Using the Scopia® Add-in for Microsoft Outlook](#) on page 13

[Modifying a Scopia® Add-in for Microsoft Outlook Invitation](#) on page 22

[Cancelling an Outlook Meeting](#) on page 22

Scheduling a Videoconference Using the Scopia® Add-in for Microsoft Outlook

About this task

When scheduling a videoconference, the options available to you are determined by your user profile:

- Basic meeting settings

Schedule a meeting without reserving resources (see [Scheduling a Videoconference Without Reserving Resources](#) on page 15 for more information). This options suits starting ad-hoc, instant meetings, but has the risk of not having enough bandwidth or available ports on the video network devices to hold your videoconference in high quality.

- Advanced meeting settings

Schedule a meeting and reserve the required video network resources (see [Scheduling a Videoconference and Reserving Network Resources](#) on page 16 for more information). This ensures your meeting has the enough resources to deliver quality videoconferencing. You can

also modify advanced meeting settings, such as whether to record the meeting, and using a meeting PIN to restrict access.

! Important:

The meeting options available to you depend on your user profile in Scopia® Management. For more information, contact your administrator, or see *User Guide for Scopia® Management*.

Before you begin

Install Scopia® Add-in for Microsoft Outlook as described in [Installing Scopia® Add-in for Microsoft Outlook](#) on page 8.

Procedure

1. Select **Scopia Meeting** in Microsoft Outlook.

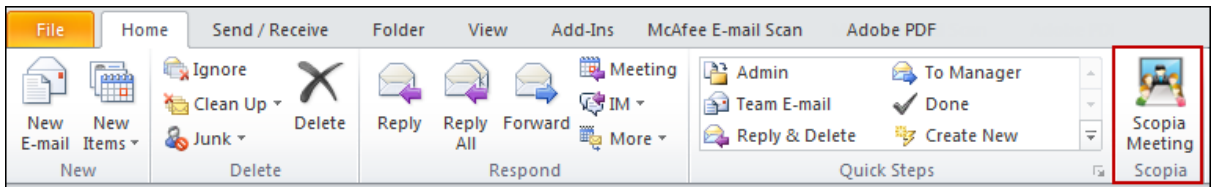


Figure 6: Locating the Scopia® Add-in for Microsoft Outlook icon at the Outlook ribbon

The scheduling window appears, showing either advanced settings, or basic outlook meeting settings.

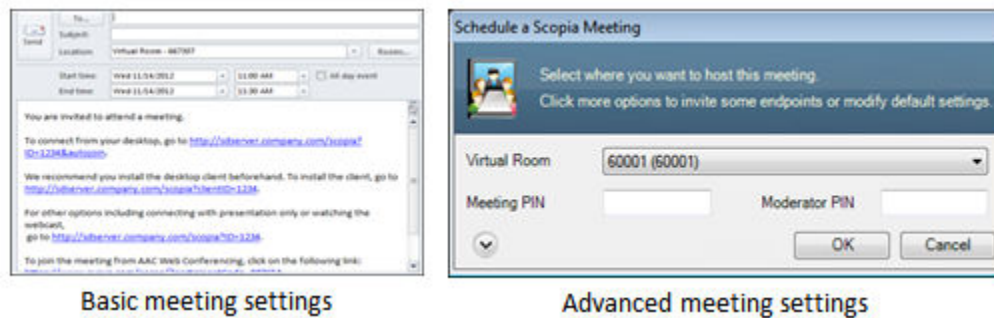


Figure 7: Scopia Meeting Settings

2. Depending on the options available to you, define the meeting settings as described in:
 - For basic meeting settings, see [Scheduling a Videoconference Without Reserving Resources](#) on page 15.
 - For advanced meeting settings, see [Scheduling a Videoconference and Reserving Network Resources](#) on page 16.

Related Links

- [Managing Meetings with Scopia® Add-in for Microsoft Outlook](#) on page 13
- [Scheduling a Videoconference Without Reserving Resources](#) on page 15
- [Scheduling a Videoconference and Reserving Network Resources](#) on page 16

Scheduling a Videoconference Without Reserving Resources

About this task

This procedure describes how to schedule a videoconference using Scopia® Add-in for Microsoft Outlook without reserving ports. If enabled for your user profile, you can schedule a videoconference with reserved resources, as described in [Scheduling a Videoconference and Reserving Network Resources](#) on page 16.

! Important:

The meeting options available to you depend on your user profile in Scopia® Management. For more information, contact your administrator, or see *User Guide for Scopia® Management*.

Before you begin

Install Scopia® Add-in for Microsoft Outlook as described in [Installing Scopia® Add-in for Microsoft Outlook](#) on page 8.

Procedure

1. Access **Scopia Meeting** add-on in Microsoft Outlook (see [Scheduling a Videoconference Using the Scopia® Add-in for Microsoft Outlook](#) on page 13).
2. Specify meeting participants in the **To** field.

Default meeting invitation text.

The screenshot shows a meeting invitation window in Microsoft Outlook. At the top, there are fields for 'To...', 'Subject:', and 'Location:'. Below these are 'Start time:' (Wed 05/03/2014 15:30) and 'End time:' (Wed 05/03/2014 16:00), with an 'All day event' checkbox. The main content area has a red header bar with the text 'AVAYA Scopia Video Collaboration Meeting'. Below the header, it says 'Join from Desktop or Mobile' and 'To connect to the conference - from your desktop, tablet or mobile device.' There is a red button labeled 'Click to Join'. Further down, it displays 'Meeting ID: 865544' and 'Meeting PIN: 1234'. At the bottom, it says 'Join from a Video Conference System' and 'To join from an endpoint, dial the meeting ID followed by the meeting PIN.'

Figure 8: Scheduling a meeting

3. You can modify the text if you prefer.

The meeting invitation is similar to a regular Microsoft Outlook meeting request, but it already contains text in the body of the invitation with web links (URLs) for the recipients to easily and quickly access your virtual meeting.

The default template text is defined in Scopia® Management. To change this template to something different, ask your administrator.

! **Important:**

The body of a message sent using the Scopia® Add-in for Microsoft Outlook can contain a maximum of 2000 characters. Any characters beyond the 2000th character are not saved when the message is sent.

4. Select **Send** to send the meeting request to Scopia® Management.

Related Links

[Scheduling a Videoconference Using the Scopia® Add-in for Microsoft Outlook](#) on page 13

Scheduling a Videoconference and Reserving Network Resources

About this task

If enabled by your user profile settings in Scopia® Management, you can schedule a videoconference and define advanced settings for your meeting using Scopia® Add-in for Microsoft Outlook.

For example, you can reserve ports to ensure that the meeting has sufficient resources, invite endpoints, or restrict the meeting by requiring participants to enter a PIN. To schedule a meeting without reserving resources, see [Scheduling a Videoconference Without Reserving Resources](#) on page 15.

! **Important:**

The meeting options available to you depend on your user profile in Scopia® Management. For more information, contact your administrator, or see *User Guide for Scopia® Management*.

Before you begin

Install Scopia® Add-in for Microsoft Outlook as described in [Installing Scopia® Add-in for Microsoft Outlook](#) on page 8.

Procedure

1. Access **Scopia Meeting** add-on in Microsoft Outlook (see [Scheduling a Videoconference Using the Scopia® Add-in for Microsoft Outlook](#) on page 13).

If you already have a virtual room defined, your virtual room, some detailed information and default settings are displayed.

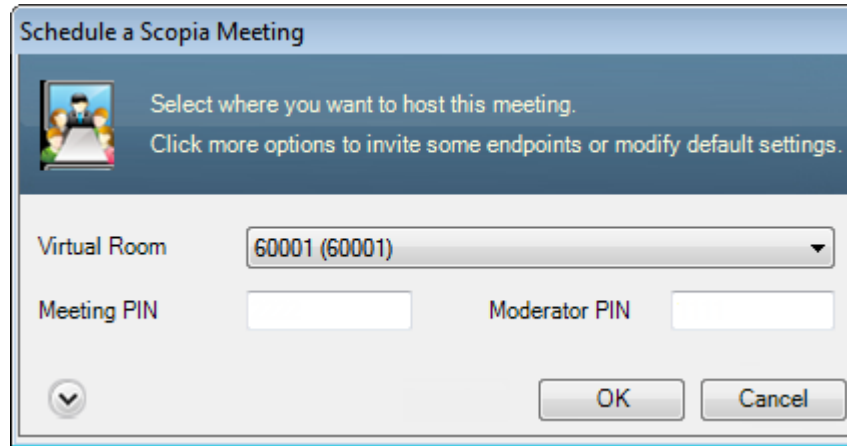


Figure 9: Advanced meeting settings

2. To use a virtual room different from your default virtual room:

- Select another virtual room belonging to you as shown in [Figure 10: Virtual room list](#) on page 17.

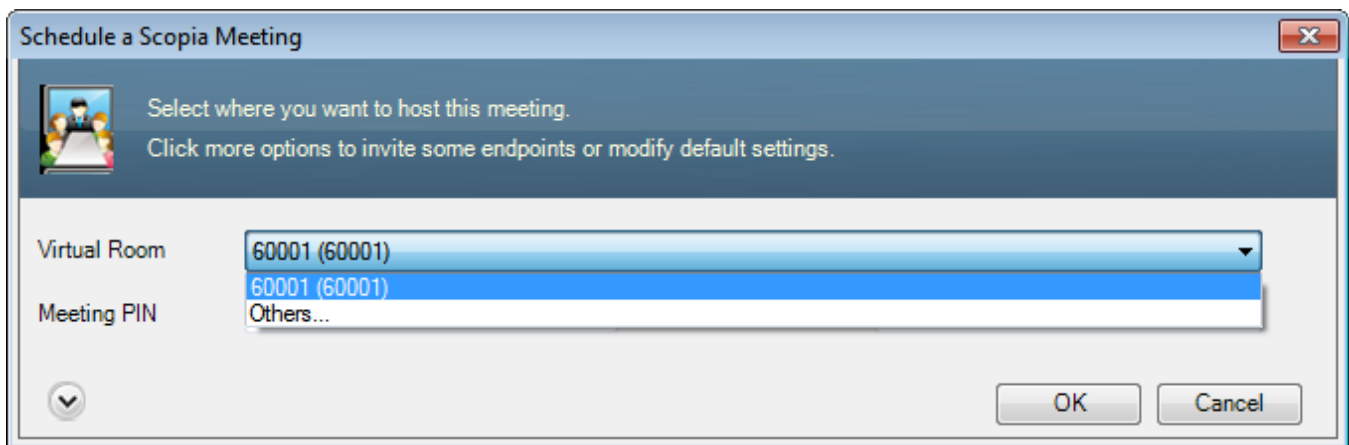


Figure 10: Virtual room list

- Or

Select a virtual room belonging to another user:

- From the **Virtual Room** list (see [Figure 10: Virtual room list](#) on page 17), select **Others**.

The Others window opens.

- Select the **Virtual Room** tab.

- Enter the name of the other participant whose virtual room you want to use as shown in [Figure 11: Selecting other user's virtual room](#) on page 18.

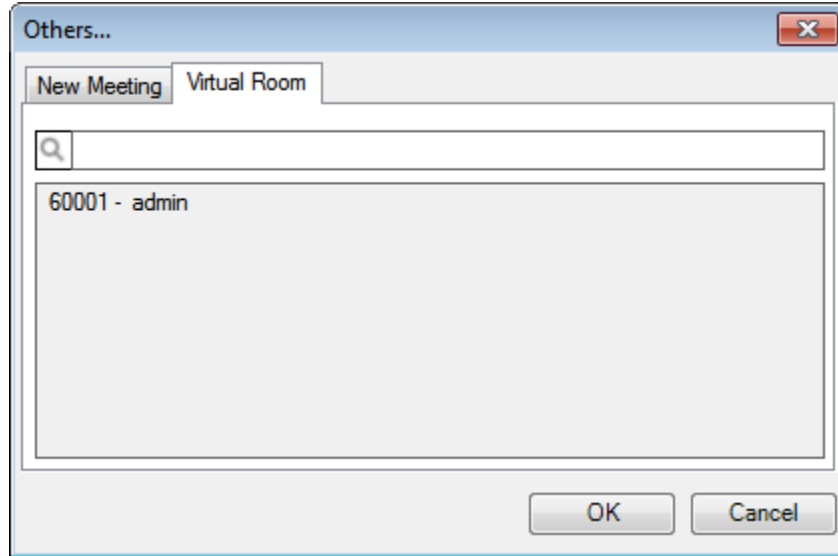


Figure 11: Selecting other user's virtual room

- d. Select a virtual room from the virtual rooms assigned to this user.

! Important:

You may not be able to select another user's virtual room for your meeting if the administrator did not enable this feature for you.

3. (Optional) Enter a PIN to restrict access to your meeting.

Participants will be required to enter this PIN when accessing the meeting.

4. (Optional) Enter a PIN to restrict meeting moderator capabilities, such as inviting additional participants.

Participants will be required to enter this PIN to access moderator functions.

5. To use a meeting type other than the default defined in your virtual room settings, select **Others** from the **Virtual Room** list as shown in [Figure 10: Virtual room list](#) on page 17, choose the **Meeting Type** from the list, and select **OK**.

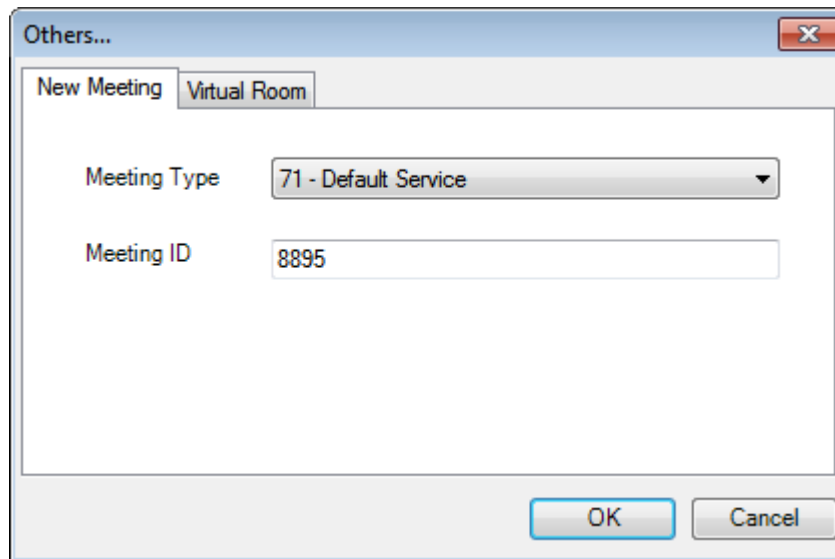


Figure 12: Modifying the meeting type

6. (Optional) Access the endpoint list and advanced options as shown in [Figure 13: Accessing advanced options](#) on page 19 and configure advanced settings for your meeting:

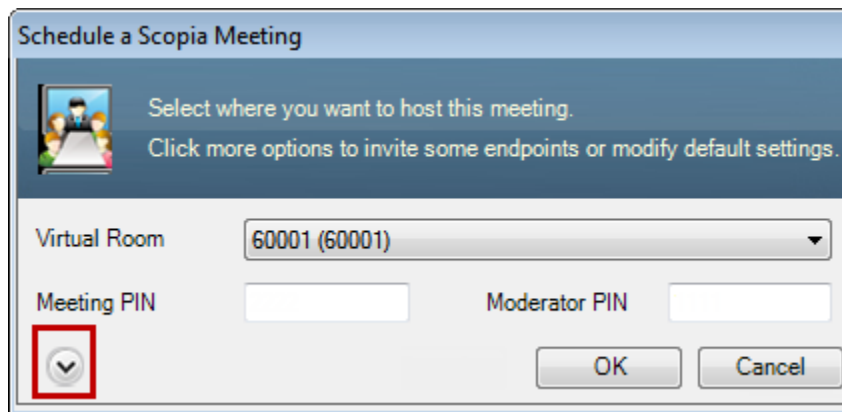


Figure 13: Accessing advanced options

- a. Search for specific endpoints to invite, either **By Directory** or **By Address**, and select **Add**.
- b. Select the **Advanced** tab to reserve ports and to customize the virtual room settings for this meeting:

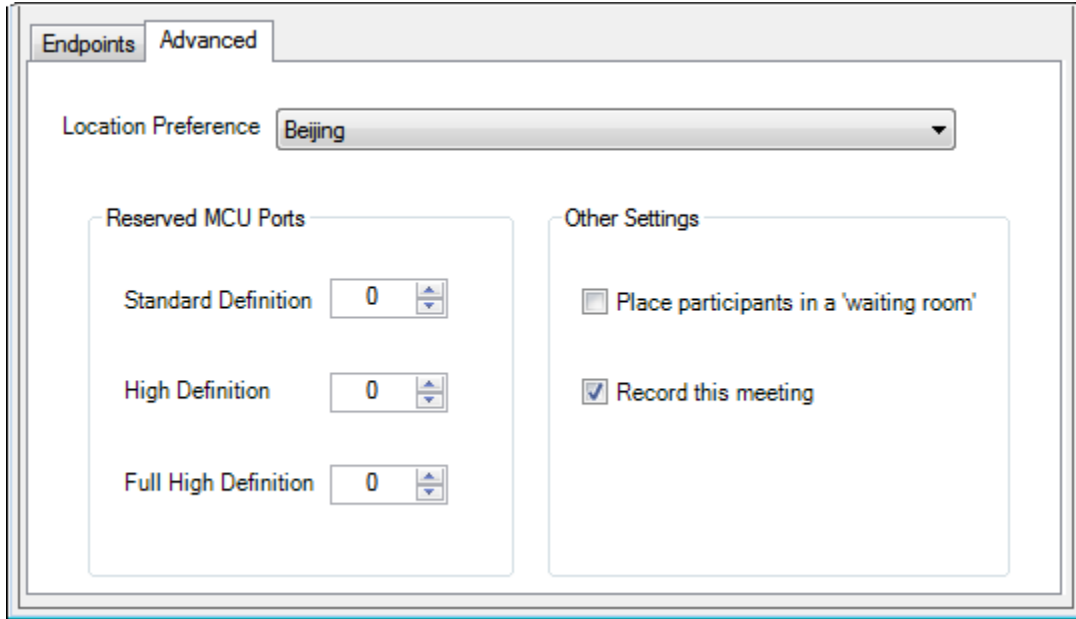



Figure 14: Advanced settings for the meeting

Define the settings based on the following table:

Table 2: Advanced settings for the Meeting

Field Name	Description
Location Preference	Select the meeting location, which is used by Avaya Scopia® Management when assigning the videoconference to a specific MCU (available only in deployments with more than one location). If you select Auto , Scopia® Management knows the endpoints' location and can thus automatically select the MCU closest to the endpoints. For example, if only one endpoint in the meeting is in Europe while the remainder are in the Far East, Scopia® Management selects an MCU located in the Far East. We strongly recommend selecting Auto to let the system choose the optimal settings matching your organization's bandwidth policies. This ensures efficient bandwidth use and maximum quality for the videoconference.
Reserved MCU Ports	You can reserve ports to ensure you have sufficient resources for the videoconference, according to the endpoint's video capabilities: <ul style="list-style-type: none"> • Standard Definition: Endpoints that support resolutions of 352p and lower. • High Definition: Endpoints that support resolutions of 720p and lower.

Table continues...

Field Name	Description
	<ul style="list-style-type: none"> • Full High Definition: Endpoints that support resolutions of 1080p and lower.
Place participants in a 'waiting room'	<p>Select this option to place all participants in a virtual waiting room. A waiting room is a holding place for participants waiting for the host or moderator to join the meeting. While waiting, participants see a static image with the name of the owner's virtual room, with an optional audio message periodically saying the meeting will start when the host arrives.</p> <p>This is available only if you entered a moderator PIN.</p>
Record this meeting	Select to automatically start recording when the meeting starts (available only when you deploy the Avaya Scopia® Streaming and Recording server or the Scopia® Desktop server).
Stream this meeting	<p>Select to automatically start streaming when the meeting starts.</p> <p> Important:</p> <p>This option is not available if you are using the Scopia® Streaming and Recording server. You need to configure the Scopia® Streaming and Recording server streaming properties using the Broadcast tab in the Schedule a Meeting window. See <i>User Guide for Scopia® Management</i> for further details.</p>

7. Select **OK** to save the Scopia® Management scheduling request and close the **Scopia Meeting** window.

The name of the virtual room appears in the **Location** field of the appointment or meeting request.

8. Specify meeting participants in the **To** field.
9. You can modify the text if you prefer.

The meeting invitation is similar to a regular Microsoft Outlook meeting request, but it already contains text in the body of the invitation with web links (URLs) for the recipients to easily and quickly access your virtual meeting.

The default template text is defined in Scopia® Management. To change this template to something different, ask your administrator.

 **Important:**

The body of a message sent using the Scopia® Add-in for Microsoft Outlook can contain a maximum of 2000 characters. Any characters beyond the 2000th character are not saved when the message is sent.

10. Select **Send** to send the meeting request to Scopia® Management.

Related Links

[Scheduling a Videoconference Using the Scopia® Add-in for Microsoft Outlook](#) on page 13

Modifying a Scopia® Add-in for Microsoft Outlook Invitation

About this task

You can modify an invitation created using Scopia® Add-in for Microsoft Outlook from within Outlook in just the same way as you would an ordinary meeting.

Procedure

1. Open the meeting from the Microsoft Outlook calendar.
2. Select **Scopia Meeting**.
3. Modify the meeting settings as required. For more information on each of the meeting settings, see [Scheduling a Videoconference and Reserving Network Resources](#) on page 16 or [Scheduling a Videoconference Without Reserving Resources](#) on page 15.
4. Select **Send Update**.

Related Links

[Managing Meetings with Scopia® Add-in for Microsoft Outlook](#) on page 13

Cancelling an Outlook Meeting

About this task

Cancelling a meeting scheduled via one of the Scopia® Management plug-ins for Microsoft Outlook is the same as cancelling a regular Outlook meeting.

Procedure

1. Select the meeting in the Outlook calendar.
2. Select **Delete**.
3. Select **Send cancellation and delete meeting**.
4. Select **Send**.

Related Links

[Managing Meetings with Scopia® Add-in for Microsoft Outlook](#) on page 13

Chapter 4: Troubleshooting

This section covers troubleshooting problems that may occur when installing and using Scopia® Add-in for Microsoft Outlook.

Related Links

[Resolving Problems Installing Scopia® Add-in for Microsoft Outlook](#) on page 23

Resolving Problems Installing Scopia® Add-in for Microsoft Outlook

Problem

You cannot install Scopia® Add-in for Microsoft Outlook.

.NET missing

You do not have .NET Framework installed.

Solution

Contact your system administrator.

Out of date Windows Installer

You do not have an updated version of Windows Installer. Scopia® Add-in for Microsoft Outlook requires version 3.1 or later.

Solution

Contact your system administrator for a Windows update.

Related Links

[Troubleshooting](#) on page 23