



MeetingPlace™ for Outlook System Manager's Guide

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Welcome to MeetingPlace—Work Better Here. MeetingPlace allows users in different locations to collaborate in real time by sharing documents over their PCs and discussing content over the telephone.

Because MeetingPlace integrates with common interfaces, such as groupware clients, web browsers, and standard and IP-based phones, users can quickly schedule and attend conferences using their preferred interface from any location.

MeetingPlace for Outlook[®] integrates MeetingPlace with your company's Exchange[™] server. This integration enables users to schedule and attend MeetingPlace meetings using their Outlook client as well as receive e-mail invitations for meetings they have been invited to. Users can choose to accept an invitation and have the meeting automatically appear in their Outlook calendar or decline the invitation if they cannot attend the meeting.

Who Should Use This Guide

This guide is for the MeetingPlace for Outlook System Manager. When installing MeetingPlace for Outlook, you will need to work with other people within your organization to obtain information about your web services, Exchange server, data communications network, and MeetingPlace conferencing system.

This guide assumes that you have some familiarity with Windows 2000, networking concepts, and web servers.

MeetingPlace for Outlook System Manager Functions

It is the responsibility of the MeetingPlace for Outlook System Manager to set up and maintain MeetingPlace for Outlook. This guide provides practical guidelines for installing, configuring, and managing this system.

As the MeetingPlace for Outlook System Manager, you are responsible for the following functions:

- Working with others, such as the MeetingPlace System Manager, Exchange Administrator, Webmaster, and Network Administrator
- Installing and configuring MeetingPlace for Outlook
- Deploying the MeetingPlace for Outlook Client setup files to your users
- Performing troubleshooting on an ongoing basis.

Visual Cues Used in This Guide

This guide includes Notes, Tips, and Warnings, which are visual cues that highlight important information.

Note: Notes contain information about a particular subject that we want to bring to your attention.

Tip: Tips offer helpful hints and time-saving suggestions about using MeetingPlace for Outlook.

WARNING: Warnings identify essential steps, actions, or system messages that should not be ignored.

Other Documents Available

For information on obtaining other documentation offered by Latitude Communications, contact your MeetingPlace support or sales representative.

For System Managers

- *MeetingServer Installation Planning Guide*. Provides instructions and worksheets for installing or upgrading MeetingPlace. Versions are available for the MeetingPlace M3 platform, the MeetingPlace PCI platform, and MeetingPlace Hosted Services.
- *MeetingServer System Manager's Guide*. Describes how to set up and maintain MeetingPlace. Versions are available for the MeetingPlace M3 platform and the MeetingPlace PCI platform.
- *MeetingPlace Web System Manager's Guide*. Describes how to set up, maintain, and use MeetingPlace Web.
- *MeetingPlace Directory Services System Manager's Guide*. Instructions for installing and maintaining MeetingPlace Directory Services.
- *MeetingPlace for Notes System Manager's Guide*. Instructions for installing and maintaining MeetingPlace for Notes.
- *MeetingPlace E-Mail Gateway System Manager's Guide*. Instructions for installing and maintaining MeetingPlace E-Mail Gateway.
- *MeetingPlace IP Gateway System Manager's Guide*. Instructions for installing and maintaining MeetingPlace IP Gateway.
- *MeetingPlace for IP Phone System Manager's Guide*. Instructions for installing and maintaining the MeetingPlace for IP application on your Cisco IP phone.

For MeetingPlace Users

- *MeetingPlace Quick Reference Cards.* “Maps” to assist users with various MeetingPlace products. Quick Reference Cards are available for the MeetingPlace telephone interface, MeetingPlace Web, MeetingPlace for Outlook, and MeetingPlace for Notes. They provide information on all MeetingPlace functions plus quick tips for setting up better meetings.
- *MeetingPlace Wallet Card.* A plastic wallet-sized card that shows the basic telephone commands for scheduling and attending meetings.
- *Voice Quick Tour.* An overview of the voice user interface features for first-time users.

Online Documentation

The following online documentation is available:

- *MeetingPlace E-Tutorials.* E-tutorials are 4-minute interactive on-line modules that teach the basic steps and functionality of MeetingPlace. Modules include Web Conferencing, Web Scheduling, Outlook, Notes and Voice. These on-line trainings are available 24*7 and help you get the most out of your MeetingPlace system.
- *Online Help.* Detailed instructions for using MeetingTime and MeetingPlace Web.
- *MeetingPlace Reference Center.* A self-service web site designed to assist end users with MeetingPlace functionality. This customizable rollout tool is included with MeetingPlace Web.

What's New in This Release

This release of MeetingPlace for Outlook (release 4.2.7) boasts several new features, including:

- *New User Interface.* Both the scheduling and attending interfaces have been updated for a cleaner, more intuitive user experience.
- *Encrypted Click to Attend Links.* Links have been encrypted for added security.
- *Check Availability Link.* Allows the user to query the MeetingPlace system to find available times for their meetings. Selecting the Check Availability link allows users to modify their meeting information and schedule all meetings—particularly within recurring meeting chains—successfully.
- *Flexible User Authentication.* This release of MeetingPlace for Outlook provides multiple authentication options including: automatic authentication per user, authentication via MeetingPlace Directory Services, login information stored in the registry or as cookies, and automatic Windows authentication.
- *WebConnect.* WebConnect provides seamless integration between multiple MeetingPlace systems through a single URL. Making use of a single database and a customer defined rollover sequence, WebConnect ensures the availability of MeetingPlace resources while still offering the benefits of a consistent user experience.
- *Increased Support for Recurring Meetings.* The recurring meetings feature is now more robust. For example, users can edit their recurring meeting patterns by simply selecting the recurrence button. They can also choose to view meeting details for select instances of a recurring meeting chain instead of the entire chain.

- *MeetingPlace Reservationless Feature.* The MeetingPlace reservationless feature enables users to meet without scheduling resources in advance. With MeetingPlace for Outlook, users can send notifications for their reservationless meetings and attend through Outlook.
- *MeetingPlace Tab.* This release of MeetingPlace for Outlook attaches a MeetingPlace tab to all MeetingPlace invitations, even when they originate from MeetingPlace Web or MeetingTime. The tab is visible to all Outlook users, whether they have MeetingPlace for Outlook installed or not.
- *Disassociate MeetingPlace Meeting.* Allows the scheduler to free up MeetingPlace resources associated with their Outlook meeting.
- *Segmented Meeting Access Configuration Support.* In a segmented meeting access configuration, a Windows server is placed in the Demilitarized Zone, or DMZ, between the Internet and the private corporate network.

This release of MeetingPlace for Outlook supports such configurations during installation. System Managers are able to select the internal and external server for which URLs must be provided. Such support enables meetings held between internal users to remain safely behind the corporate firewall while allowing meetings with external attendees to be attended in the DMZ.

- *Master HTML Form for Customizations.* Modifications to the MeetingPlace tab can now be made from a single master form. These customizations are stored in a separate file from code data. Thus, upon upgrade, customizations are maintained while logic and data usage are updated. Refer to Appendix B for customization rules.

- *Continuous Meetings.* Notifications for continuous meetings scheduled from non-Outlook interfaces (e.g., MeetingTime) are now received in Outlook. Users can attend such meetings directly from their Outlook calendar. Those with System Manager privileges can also schedule or delete such meetings from Outlook.
- *Message Box Announcing New Upgrades.* When a new release of MeetingPlace for Outlook is available, a message box alerts users of this upgrade.
- *Click to Download MeetingPlace for Outlook Client.* Users who are invited to MeetingPlace meetings, but who do not have the MeetingPlace for Outlook software, can now download the MeetingPlace for Outlook software from the MeetingPlace tab in their notification
- *Progress Bar.* A progress bar now indicates when a page is loading during MeetingPlace for Outlook operations.
- *Improved Notification Performance.* A database is kept on the MeetingPlace for Outlook gateway machine to meet increased performance needs. This dismisses the product's need to query the Exchange server to find existing meetings.
- *Notifications Formatted in Recipient's Time Zone.* Invitations for meetings scheduled through MeetingPlace Web or MeetingTime are now displayed in the recipient's time zone. If the invitee is a guest, the time zone is that of the guest profile.
- *Japanese Notifications and Templates.* Users with the Japanese language option can receive notifications with Japanese characters.

Getting Technical Assistance

Should you have questions or problems with MeetingPlace for Outlook, Latitude Communications and its authorized distributors are available to help you within the guidelines of your support program.

Before getting technical assistance, please check the printed or online product documentation. Then, call your MeetingPlace support center or e-mail the information to: support@latitude.com.

When you call, be ready to provide the following:

- The version number of MeetingPlace for Outlook (right-click on *MPOutlook.exe* and select **Properties**)
- The version number of your Exchange server (from the Exchange Administrator window's **Help** menu, select **About**)
- The version number of your Microsoft Outlook client (from the Outlook **Help** menu, select **About Microsoft Outlook**)
- The version number of your Windows server and any service packs that are installed on the gateway machine (from the Windows Explorer **Help** menu, select **About Windows**)
- The version number of MeetingPlace Web (this number is located at the bottom of the Welcome page)
- The version number of your MeetingPlace system software (from the MeetingTime **Help** menu, select **About MeetingTime**)
- The exact wording of any messages or alarm codes reported
- Questions you have or a description of the problem you are experiencing

2 MeetingPlace for Outlook Concepts and Functions

To understand MeetingPlace for Outlook functionality, it is helpful to understand its role in the entire MeetingPlace system. This chapter provides an overview of both MeetingPlace and MeetingPlace for Outlook.

MeetingPlace Concepts

MeetingPlace uses your organization's existing telephony and/or IP-based infrastructure to provide voice conferencing over standard PSTN and IP phones.

MeetingPlace can also be integrated with your organization's standard business applications, such as e-mail and groupware applications. To facilitate integration with these resources, system options are installed on a Windows-based server that communicates with MeetingPlace over your network.

To facilitate advanced user interfaces and integration with other shared network resources, the MeetingPlace server also connects to your local or wide area network and communicates with MeetingPlace desktop software products to facilitate integration with other network resources.

MeetingPlace for Outlook is software that communicates with both your MeetingPlace server and Microsoft Exchange server.

The Meeting Process

The MeetingPlace system does more than just bridge callers together at the time of a meeting. MeetingPlace provides a number of meeting-related services, including:

- *Scheduling of meeting resources.* Users can reserve space on MeetingPlace in advance of the meeting. Using this scheduling function allows users to reserve the date, time, and length of the meeting for a specified number of attendees. In addition, users can schedule other resources, such as disk space for meeting recordings.
- *Notifying attendees.* When scheduling a MeetingPlace meeting, users can specify the list of people they want to attend, and MeetingPlace for Outlook will automatically send out e-mail invitations to these attendees.
- *Distributing meeting materials.* Users can attach documents at any time before, during, or after a meeting. These attachments can be agendas, working documents, action items, or Uniform Resource Locators (URLs). MeetingPlace can act as the repository for these attachments and provide access to them for download or e-mail.
- *Web conferencing.* MeetingPlace not only allows users to view attached documents, but can also enable them to participate in web conferences for real-time application sharing and collaboration.
- *Meeting recording.* Meeting attendees can record their meetings on MeetingPlace. After the meeting, attendees can dial into MeetingPlace over the telephone and listen to the recording. They can also listen to the recording over the Web using streaming audio or download the recording over the data network in popular sound file formats.
- *Voice comments.* In addition to recordings, MeetingPlace has the concept of voice comments. Voice comments enable those who cannot attend meetings to actively contribute to them by recording a message. When invitees leave voice comments, MeetingPlace can automatically notify meeting attendees via e-mail about the new comment.

MeetingPlace for Outlook facilitates usage of all of these functions.

User Profiles

Like other internal company resources, many MeetingPlace functions require that users identify themselves via a user profile. A user profile consists of the following:

- Security information (user ID, password, etc.)
- Personal information (name, time zone, default billing code, etc.)
- Class-of-service privileges enabling access to features (scheduling, outdialing, recording, etc.)
- Addressing information (phone, e-mail, pager, etc.)
- Default meeting preferences (announced entries, roll calls, automatic notifications, etc.)

Meeting schedulers must have a MeetingPlace user profile. Additionally, it is recommended that users who frequently participate in meetings also have MeetingPlace user profiles.

Guest Access

MeetingPlace also has the concept of guest access to the system. To facilitate meetings with those who do not have user profiles, MeetingPlace enables guests to both join and review materials (including recordings) for unrestricted meetings.

Meeting Preferences

Meeting preferences indicate how the meeting is to be run. MeetingPlace automatically assigns meeting preferences based on defaults specified in the scheduler's user profile. However, meeting schedulers can choose to override their defaults on a meeting-by-meeting basis.

Examples of meeting preferences include:

- Whether to announce callers automatically as they attend or depart
- Whether to require that attendees enter a numeric password prior to entering the meeting
- Whether to allow attendees to take a roll call

MeetingPlace for Outlook Concepts

This section provides an overview of MeetingPlace for Outlook and discusses how it integrates with your MeetingPlace server and Exchange server to schedule meetings and distribute invitations.

About MeetingPlace for Outlook

MeetingPlace for Outlook is composed of three main components:

- MeetingPlace for Outlook Notification Services
- MeetingPlace for Outlook Client Services
- MeetingPlace for Outlook Client

The MeetingPlace for Outlook Notification and Client Services components form the MeetingPlace for Outlook gateway, which is installed on a Windows 2000 server. The MeetingPlace for Outlook Client is installed on your end users' systems and enables scheduling from their Microsoft Outlook interface using the MeetingPlace for Outlook scheduling form. Figure 2-1 displays the MeetingPlace for Outlook scheduling form.

Figure 2-1 MeetingPlace for Outlook Scheduling Form

Once installed, MeetingPlace for Outlook enables your users to:

- Schedule MeetingPlace meetings using an HTML-based form in their Outlook calendar
- Receive Outlook calendar invitations for MeetingPlace meetings, including update notifications for rescheduled meetings
- Attend MeetingPlace meetings with a Click to Attend web link in their meeting invitation or Outlook calendar (requires MeetingPlace Web)

When a user schedules a meeting using the MeetingPlace for Outlook scheduling form, the Outlook extension passes the scheduling request to the MeetingPlace for Outlook gateway. The MeetingPlace for Outlook gateway then takes the scheduling request and works with the MeetingPlace server and Exchange server to schedule the meeting and send out meeting invitations.

The Scheduling and Notification Process

The scheduling and notification process differs depending on whether the meeting was scheduled using Microsoft Outlook or an alternative scheduling client, such as MeetingTime or MeetingPlace Web.

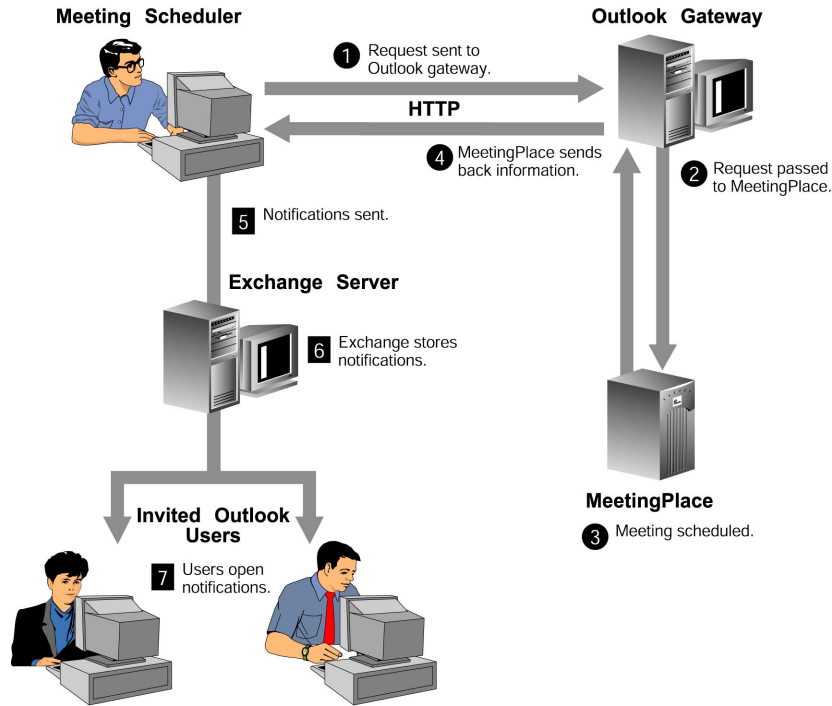
Microsoft Outlook

When a user schedules a meeting through Outlook, the MeetingPlace for Outlook gateway forwards the scheduling request to the MeetingPlace server. If resources are available at the requested time, MeetingPlace schedules the meeting and sends back information that will appear in the meeting invitations. Once Outlook receives this information, the meeting invitations are then sent to the invited users' mailboxes on the Exchange server.

When users open their invitations, they can let the scheduler know if they plan on attending the meeting by selecting Accept or Decline. After selecting one of these options, an e-mail message is sent back to the Exchange server with this information. This process enables the Exchange server to keep track of which attendees plan on attending the meeting.

Note: When a meeting is set up using Microsoft Outlook, only the Exchange server keeps a record of the invited attendees. Because MeetingPlace does not track this information, the system cannot page or outdial to invited attendees at the start of a meeting.

Figure 2-2 displays the scheduling and notification process for meetings scheduled using Microsoft Outlook.



MeetingPlace Scheduling Process

- 1** User schedules a meeting through Outlook, causing a meeting request to be sent to the Outlook gateway.
- 2** The Outlook gateway passes the meeting request to MeetingPlace.
- 3** The meeting is scheduled on MeetingPlace.
- 4** MeetingPlace sends information back to Outlook that will appear in the meeting notifications and the details are sent back to the scheduler.

Standard Exchange Notification Process

- 5** Notifications are sent to the mailboxes of the invited Outlook users.
- 6** The Exchange server stores the meeting notifications.
- 7** The invited Outlook users check their Inbox and open the meeting notification, which they can accept or decline. If accepted, the meeting appears in their Outlook calendar.

Figure 2-2 How Meetings are Scheduled Using Outlook

MeetingTime and MeetingPlace Web

When a user schedules a meeting using MeetingTime or MeetingPlace Web, the MeetingPlace for Outlook gateway picks up the meeting invitations from the MeetingPlace post office and schedules the meeting on the Exchange server, which sends notifications to the invited users.

When users accept or decline these invitations, the Exchange server forwards these messages directly to the meeting scheduler, but does not keep track of the information in its database.

Figure 2-4 displays the scheduling and notification process for meetings scheduled using MeetingTime or MeetingPlace Web.

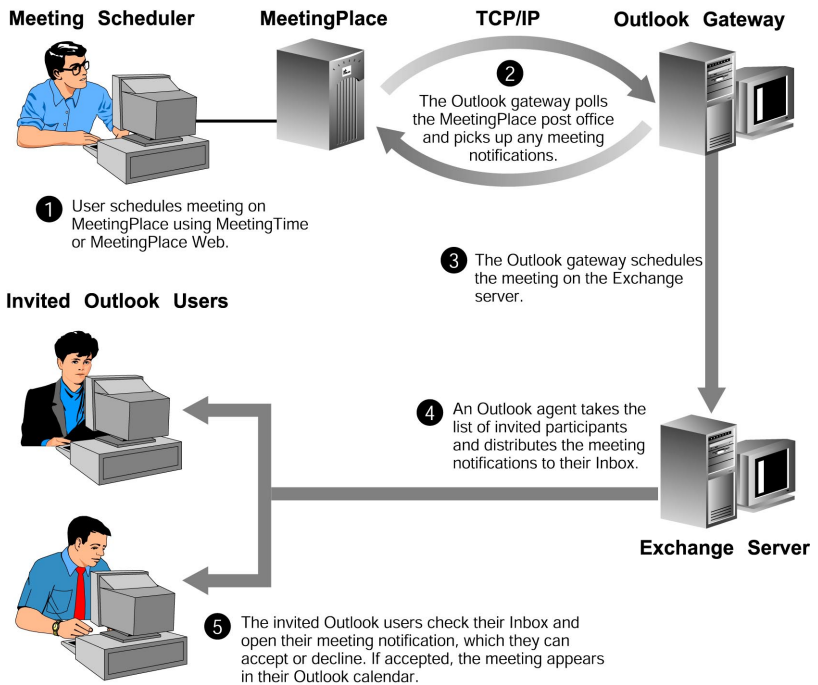
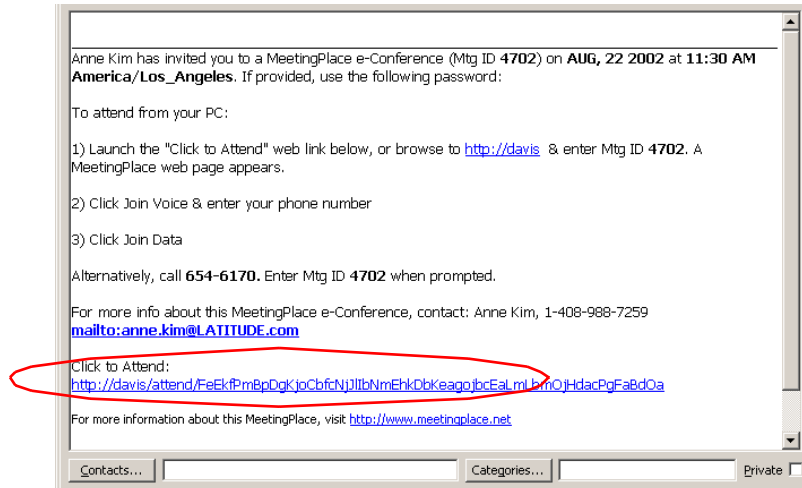


Figure 2-3 How Meetings are Scheduled Using MeetingTime or MeetingPlace Web

The Attending Process

With MeetingPlace Web installed and running, your users can attend meetings with a Click to Attend link located at the end of their meeting invitation. If a user accepts the invitation, the meeting and Click to Attend link appear in their Outlook calendar.



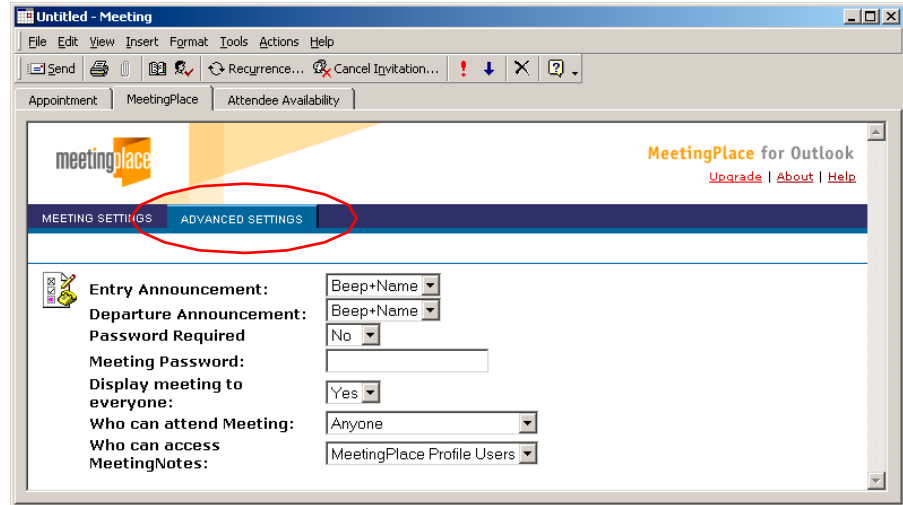
After a user clicks the Click to Attend link, their web browser opens. If this is the first time the user is accessing MeetingPlace Web, the Click to Attend link takes them to the MeetingPlace Web login page with the meeting ID pre-populated.

If the user has previously logged into MeetingPlace Web and selected the **Remember Me** checkbox, the Click to Attend link takes them directly into the web conference.

If you do not want the Click to Attend link to appear in notifications, refer to Chapter 5 for information on customizing your meeting notifications.

Attending Restricted Meetings

If a meeting is scheduled with any restrictions, all users who click the Click to Attend link need to log into MeetingPlace using their user ID and password. Meeting restrictions are set from the MeetingPlace tab's Advanced Settings page.



Meeting restrictions include:

- Setting the **Who can attend Meeting** parameter to **MeetingPlace Profile Users**
- Setting the **Who can access MeetingNotes** parameter to **MeetingPlace Profile Users**

Windows Services

For ongoing communication with the MeetingPlace server, MeetingPlace for Outlook includes the following Windows services:

- MeetingPlace Agent
- MeetingPlace Notification Gateway
- MeetingPlace Gateway SIM
- MeetingPlace for Outlook

Because these programs are implemented using the standard Windows services architecture, you can use standard mechanisms to start and stop the services, view their event log, and remotely monitor their activity.

MeetingPlace Gateway Administrative Interfaces

MeetingPlace for Outlook comes with administrative interfaces that enable you to configure the MeetingPlace Agent, Gateway SIM, and MeetingPlace for Outlook gateway services. For more information about configuring these services, refer to Chapter 4.

3 Installing MeetingPlace for Outlook

This chapter discusses the MeetingPlace for Outlook installation process. It does not discuss upgrades. Refer to Appendix D for instructions on upgrading from a previous version of MeetingPlace for Outlook.

The topics covered in this chapter include:

- Installation Options
- Preparing for the Installation
- Installing MeetingPlace for Outlook
- Distributing and Installing the MeetingPlace for Outlook Client

Installation Options

MeetingPlace for Outlook must be installed on a Windows 2000 server. This server can be provided by the customer or purchased through Latitude Communications. Servers purchased through Latitude Communications are pre-configured for the installation of multiple MeetingPlace gateways and arrive to the customer with the requested gateways installed. Please contact your MeetingPlace sales representative for further information on this option.

MeetingPlace for Outlook can be installed in one of three ways:

- Full integration with your Outlook application
- MeetingPlace for Outlook Client Services only
- MeetingPlace for Outlook Notification Services only

End User Outlook Integration

Installing both the Client and Notification Services allow you to schedule MeetingPlace meetings through MeetingPlace for Outlook and receive notifications in your Outlook calendars.

This option requires prior installation of MeetingPlace Web (release 4.2.7.106 or higher) on the same system where you will be installing MeetingPlace for Outlook.

Client Services Only

The MeetingPlace for Outlook Client Services installation creates the *Setup.exe* file, which is used to install the MeetingPlace for Outlook Client on end user systems.

Installing only the MeetingPlace for Outlook Client Services component allows you to schedule MeetingPlace meetings from Outlook. This option requires prior installation of MeetingPlace Web (release 4.2.7.106 or higher) on the same system where you will be installing MeetingPlace for Outlook.

Notification Services Only

Installing only the MeetingPlace for Outlook Notification Services component allows you to receive notifications from MeetingPlace meetings scheduled through MeetingPlace Web and MeetingTime. This option does not enable you to schedule MeetingPlace meetings through Outlook.

This option does not require prior installation of MeetingPlace Web.

Proxy Installations

Proxy installations are supported with MeetingPlace for Outlook. Proxy configurations must not block access from the gateway machine to either the Exchange server or the MeetingPlace server. Valid IP connections are necessary for all actions to/from MeetingPlace for Outlook gateway and Outlook clients.

Preparing for the Installation

To prepare for the installation of MeetingPlace for Outlook on a customer provided Windows 2000 server:

- Refer to Table 3-1, “MeetingPlace for Outlook System Requirements”, to make sure your system meets the specified requirements.

Notes:

- System requirements depend on whether or not you are installing MeetingPlace Web with MeetingPlace for Outlook. MeetingPlace Web (release 4.2.7.106 or higher) is required for full functionality of MeetingPlace for Outlook.
 - If you wish to enable full MeetingPlace Web functionality on this system, please refer to the *MeetingPlace Web System Manager's Guide* for full installation and configuration requirements.
 - The Service Pack listed for the Windows 2000 server is the minimum required. For increased security, it is recommended that you install the latest Service Pack and all Critical Updates.
 - MeetingPlace for Outlook must be installed from an Administrator class account on the domain or, at a minimum, the local machine.
-
- Fill in Table 3-2, “What You Need to Know Before Installing MeetingPlace for Outlook”, so you have all the information you need to complete the installation.
 - Make sure that your default Outlook mailbox is configured correctly. The logged in user at the time of installation must have rights to the Outlook mailbox. Otherwise, the installation will indicate an error and abort. Refer to page 28 for instructions.

Topic	Requirements	✓
	<ul style="list-style-type: none"> • MeetingPlace PCI systems that are not networked together must each have MeetingPlace for Outlook installed. <input type="checkbox"/> • MeetingPlace M3 systems on separate networks must each have MeetingPlace for Outlook installed. <input type="checkbox"/> 	
3. Windows Server (hardware requirements)	<p>MeetingPlace for Outlook with MeetingPlace Web (required for full functionality or for Client Services only):</p> <ul style="list-style-type: none"> • A Windows server dedicated to MeetingPlace applications is required based on the number of user licenses (ports) on your MeetingPlace system. <input type="checkbox"/> <p>Note: Please refer to the <i>MeetingPlace Web System Manager's Guide</i> for minimum specifications based on the number of user licenses (ports) on your MeetingPlace system.</p> <ul style="list-style-type: none"> • TCP/IP connection to the MeetingPlace server. <input type="checkbox"/> <p>MeetingPlace for Outlook without MeetingPlace Web (for Notification Services only):</p> <ul style="list-style-type: none"> • Minimum hardware: <input type="checkbox"/> <ul style="list-style-type: none"> • 256MB RAM • 2.5GB free disk space • 400MHz Pentium II processor • TCP/IP connection to the MeetingPlace server <input type="checkbox"/> <p>Note: It is not recommended that MeetingPlace for Outlook be installed on a Domain Controller.</p>	
4. Windows Server (software requirements)	<ul style="list-style-type: none"> • Microsoft Windows 2000 Server edition or Advanced Server edition (Service Pack 2 or higher) <input type="checkbox"/> • NT File System (NTFS) with >2.5GB free space available <input type="checkbox"/> • Microsoft IIS 5.0 <input type="checkbox"/> • One of the following Microsoft Outlook clients installed and configured to log into the Exchange mailbox: <input type="checkbox"/> 	

Topic	Requirements	✓
	<ul style="list-style-type: none"> • Outlook 98, Outlook 2000 (Service Release 1 and Service Pack 3) with Collaboration Data Objects (CDO) installed. <p>Notes:</p> <ul style="list-style-type: none"> • Your default mail client must be set to Outlook. • The Outlook client must be completely installed to the local drive. Network installations are not supported. • MeetingPlace for Outlook does not support “thin clients”, i.e., Citrix or Terminal Server • The Windows server and the Exchange server should belong to the same domain unless they have a trust relationship between them. • For auto-authentication, MeetingPlace Directory Services must be installed with the Network Credentials field populated or the user’s network login must match the MeetingPlace user ID. For more information on auto-authentication, refer to “Logins Tab” on page 38. • If you are planning to use Outlook 2000 on the MeetingPlace for Outlook gateway machine, you MUST ensure that CDO is loaded. CDO is not loaded by default when loading Office 2000. It must be manually selected as an option during setup. 	
5. Network Requirements	<p>For the Windows server to communicate with the MeetingPlace server, the following requirements need to be met:</p> <ul style="list-style-type: none"> • <i>In a networked PCI environment</i>, the Windows server must be able to open a TCP connection on port 5003 when connecting to the primary MeetingPlace server and port 5005 when connecting to each additional MeetingPlace server. • <i>In a standalone PCI or M3 environment</i>, the Windows server must be able to open a TCP connection on ports 5003 and 5005 when connecting to the primary MeetingPlace server. 	<input type="checkbox"/>

Description	Value
3. The hostname of the machine where you will be installing MeetingPlace for Outlook.	Hostname: _____
4. The hostname or static IP address of your MeetingPlace Web servers, if installed. These are required for the Click to Attend links. <ul style="list-style-type: none"> • Web 1 is your internal MeetingPlace Web server • Web 2 is your external MeetingPlace Web server Note: If you do not have separate servers for your internal and external MeetingPlace Web, repeat the URL of Web 1 in the space assigned for Web 2.	Web 1 (internal): Hostname _____ IP address _____ Web 2 (external): Hostname _____ IP address _____
5. MeetingPlace WebPublisher license key. This is required even if you do not want to install MeetingPlace Web conferencing functionality.	MeetingPlace WebPublisher license key: _____
6. The hostname of the MeetingPlace server.	MeetingPlace hostname: _____
7. Ensure the Calendar and Notification option keys are enabled on the MeetingPlace server.	<input type="checkbox"/>

Configure the Default Outlook Mailbox

The default Outlook mailbox must be configured correctly before you attempt to install MeetingPlace for Outlook. The following is an example of how to configure your default mailbox.

Example:

1. Create a User on your domain (e.g., MPLatitude).
2. Create a mailbox for “MPLatitude” on the Exchange server.
3. Give local administrative rights to “MPLatitude” on the gateway machine.

Note: Windows 2000 may not give **log on as service** rights to the user. Before installing, verify that the user has these rights by accessing Administrative Tools | Local Security Policy | Local Policies | User Rights Assignment | Log on as service.

4. Login as “MPLatitude” on the MeetingPlace for Outlook machine.
5. Configure your default Outlook profile to open the mailbox of “MPLatitude”.

Uninstalling MeetingPlace E-mail Gateway

If you have another MeetingPlace notification gateway installed, such as MeetingPlace E-mail Gateway (MAPI or SMTP) or MeetingPlace for Notes, you must uninstall these applications before installing MeetingPlace for Outlook. MeetingPlace Notification Service can only support one notification gateway at a time.

WARNING: Uninstalling MeetingPlace for Outlook from a machine running a second MeetingPlace gateway may cause the second gateway to stop functioning. Please contact your support representative for removal instructions.

To uninstall a MeetingPlace notification gateway:

1. Stop all MeetingPlace Services. Stopping these services free up system resources and enable the Setup program to run more quickly.
2. Open the **Add/Remove Programs** window. (Start | Settings | Control Panel | Add/Remove Programs).
3. Select the MeetingPlace gateway you want to remove, e.g., MeetingPlace E-Mail Gateway, MeetingPlace SMTP Gateway, MeetingPlace for Notes.

4. Click **Remove**.
5. Restart your computer and verify that the MeetingPlace gateway was successfully uninstalled.

You may now proceed with the MeetingPlace for Outlook installation.

Enabling the Option Keys

An option key is an alphanumeric string similar to a serial number that needs to be entered into the MeetingPlace database to activate a system option. To enable the Calendar and the Notification option keys:

1. Locate the option key on the MeetingPlace server's license document.
2. Open MeetingTime, and select the **Configure** tab.
3. Select the **System Options** topic, and then click **Query**.
4. Use the right arrow button to locate the option keys you wish to enable.
5. Enter the option key number in the option key parameter.
6. Click **Save Changes** and restart the MeetingPlace server for the option key(s) to take effect.

Disabling Outlook Client Reminders

It is recommended that you disable Outlook reminders prior to running the MeetingPlace for Outlook installation. If this is not done, multiple reminder windows may appear following the installation.

To disable Outlook client reminders:

1. From the Outlook **Tools** menu, click **Options**. Click the **Other** tab, and then click **Advanced Options**.

2. Click **Reminder Options**.
3. Clear the **Display the reminder** and **Play reminder sound** check boxes, then click **OK**.

Installing MeetingPlace for Outlook

This installation assumes that you are installing MeetingPlace Web (release 4.2.7.106 or higher) and MeetingPlace for Outlook on the same Windows 2000 server. MeetingPlace Web must be installed **prior** to installing MeetingPlace for Outlook.

For alternative installation configurations, including Segmented Meeting Access configurations, please refer to Appendix C.

Before installing MeetingPlace for Outlook, make sure you have:

- Completed the steps in the “Preparing for the Installation” section of this chapter.
- Administrator privileges on the Windows server where you will be installing MeetingPlace for Outlook including **log on as service** rights if you are using Windows 2000.

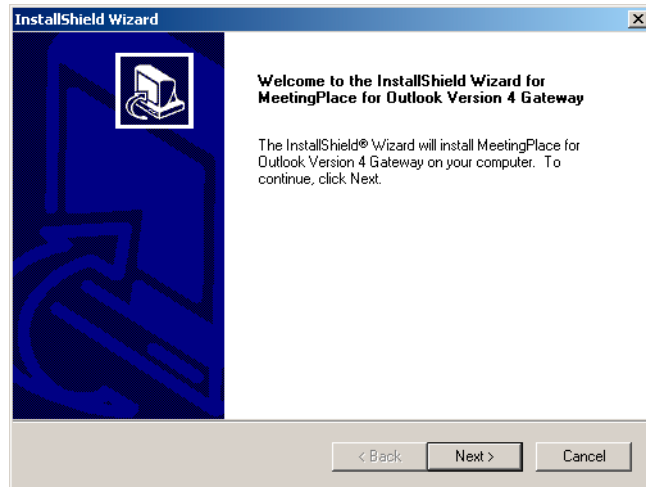
MeetingPlace for Outlook Installation

The MeetingPlace for Outlook Setup program installs the following components:

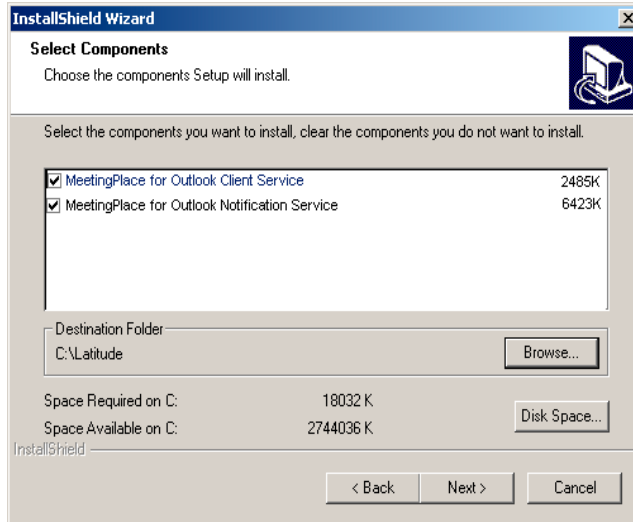
- *MeetingPlace Gateway SIM (System Integrity Manager)*. Provides remote administration services for MeetingPlace for Outlook.
- *MeetingPlace for Outlook Client Services*. Includes the Configure Client Setup Utility, which generates the client setup files.
- *MeetingPlace for Outlook Notification Services*. Includes the MeetingPlace Notification Gateway and *MPOutlook.exe*.

To install MeetingPlace for Outlook:

1. Insert the MeetingPlace for Outlook CD, and run the *Setup.exe* file.
2. When the Welcome window appears, click **Next**.



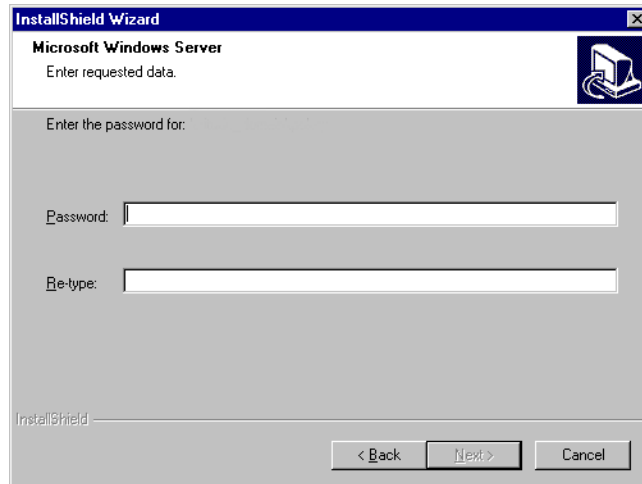
3. When the Select Components window appears, check the components you want Setup to install and clear the components you do not want installed. Each option is explained below. When finished, click **Next**.
 - *MeetingPlace for Outlook Client Services*. Select this component to have the MeetingPlace for Outlook Client Services files installed. The installer will check to see if MeetingPlace Web is installed. Installation will stop if you do not have MeetingPlace Web installed.
 - *MeetingPlace for Outlook Notification Services*. Select this component to have the MeetingPlace for Outlook Notification Services files installed.



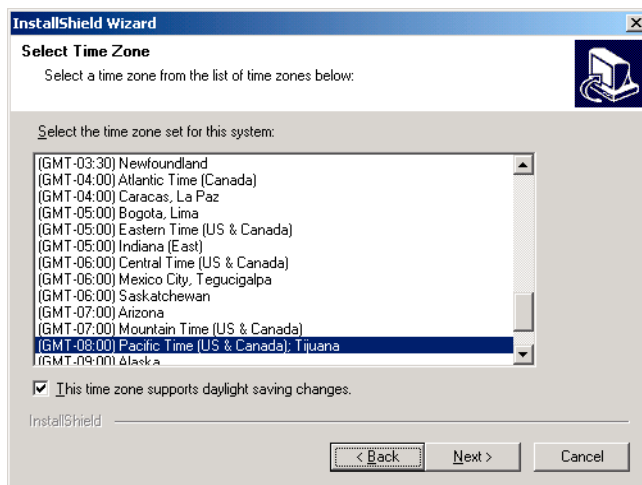
4. Enter the Windows server user name and domain using the values you wrote down in Table 3-2, Item 2, and then click **Next**.



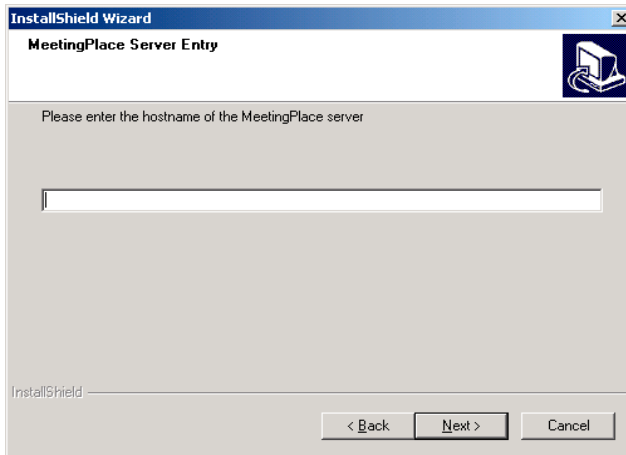
5. Enter the Windows server password. This is the password for the MeetingPlace for Outlook user account that you wrote down in Table 3-2, Item 2. Re-enter the password and click **Next**.



6. When prompted to select a time zone for MeetingPlace, select the local time zone of your Windows server, and then click **Next**.



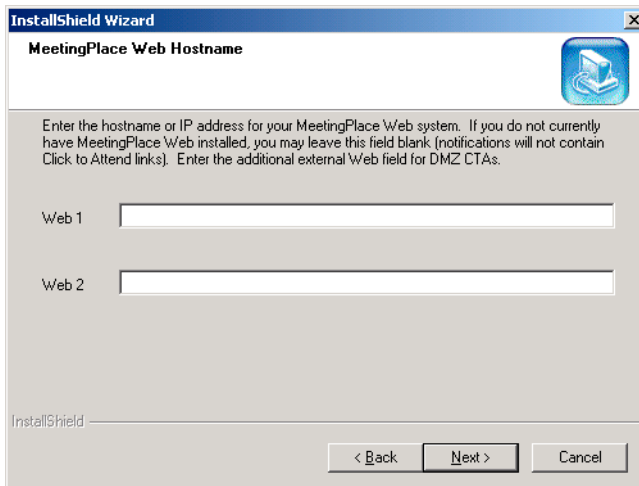
7. When prompted to enter the hostname of the MeetingPlace server, enter the name of your MeetingPlace server. This is the value you wrote down in Table 3-2, Item 6. Click **Next**.



The screenshot shows a dialog box titled "InstallShield Wizard" with the subtitle "MeetingPlace Server Entry". The main text reads "Please enter the hostname of the MeetingPlace server". Below this text is a single-line text input field. At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

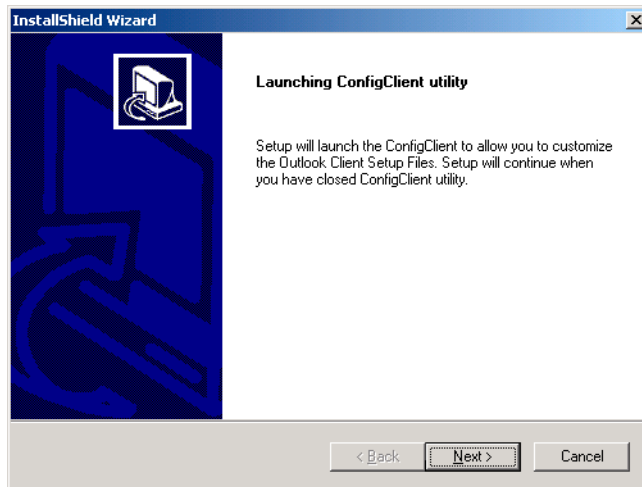
8. If you selected to have MeetingPlace Web installed, enter the hostname or IP address of your MeetingPlace Web servers. These are the values you wrote in Table 3-2, Item 4.

If you do not have MeetingPlace for Web installed, leave this blank. Click **Next**.



The screenshot shows a dialog box titled "InstallShield Wizard" with the subtitle "MeetingPlace Web Hostname". The main text reads "Enter the hostname or IP address for your MeetingPlace Web system. If you do not currently have MeetingPlace Web installed, you may leave this field blank (notifications will not contain Click to Attend links). Enter the additional external Web field for DMZ CTAs." Below this text are two text input fields labeled "Web 1" and "Web 2". At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

9. As the Setup program starts to install the application, a setup status window indicates the installation progress. Click **Cancel** if you wish to stop the installation.
10. To launch the Configure Client Setup Utility, click **Next**. The Setup program will continue once you close the Configure Client Setup Utility, .



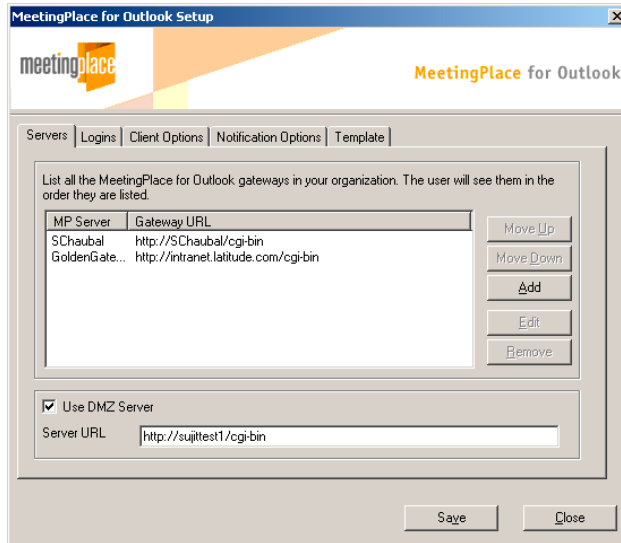
The Configure Client Setup Utility

The Configure Client Setup Utility window generates the MeetingPlace for Outlook Client setup program (*Setup.exe*) and enables you to modify settings in five areas: Servers, Logins, Client Options, Notification Options, and Template.

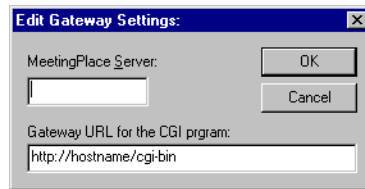
Note: Distribute *Setup.exe* to your users after installing and configuring the MeetingPlace for Outlook Client setup files.

Servers Tab

The Servers tab enables you to add MeetingPlace for Outlook gateways for use by your users.



1. To create an entry for the MeetingPlace for Outlook gateway, click **Add**. The **Edit Gateway Settings** dialog box opens.



2. For **MeetingPlace Server**, enter a name for your MeetingPlace server. This will appear in the MeetingPlace scheduling form. This name does not have to match the system's hostname.
3. For **Gateway URL**, replace the hostname with the value you wrote down in Table 3-2, Item 3 in the following format: *http://hostname/PathToCgiDirectory*, where *PathToCgiDirectory* refers to your web server's virtual CGI directory (usually */cgi-bin*).

The MeetingPlace for Outlook Client will use this URL to connect to MeetingPlace for Outlook. Click **OK**.

Tip: If you have two or more MeetingPlace servers that are not networked together (or on the same network in the case of M3 servers) and each server has its own MeetingPlace for Outlook gateway, create an entry for each MeetingPlace for Outlook gateway. This enables your users to select which MeetingPlace server they want to use when they schedule their meetings

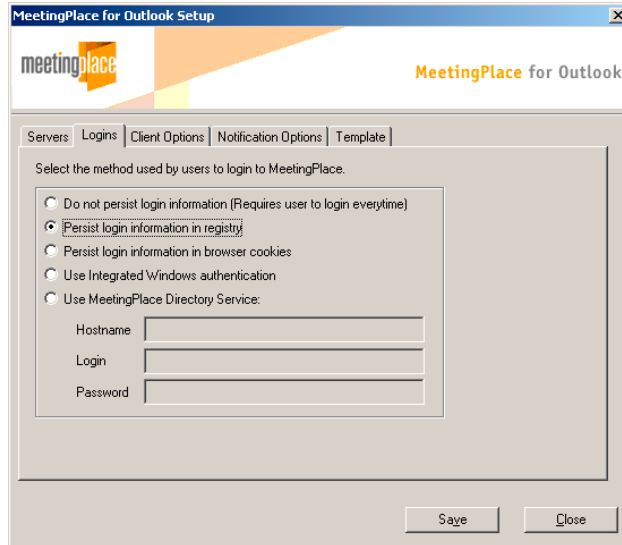
4. If you have a MeetingPlace Web server configured in your DMZ, select the **Use DMZ Server** checkbox and click **Save**.

In a Segmented Meeting Access configuration, a Windows server is typically placed in the demilitarized zone, or DMZ, between the Internet and the private corporate network. Selecting to use a MeetingPlace Web server in your DMZ enables your MeetingPlace system for both internal and external attendees. Refer to Appendix C for further information on supported Segmented Meeting Access configurations.

Logins Tab

MeetingPlace for Outlook provides users with multiple authentication options to enable ease of use and flexibility.

The Logins tab enables you to configure how and if your users will take advantage of automatic authentication.



1. From the Logins tab, select the login method for your users from the following five options:

- *Do not persist login information.* Disables any form of automatic authentication. This option requires users to login each time they wish to use MeetingPlace for Outlook.
- *Persist login information in registry.* If the scheduler and invitee have MeetingPlace for Outlook installed, login information is stored in the registry after their initial session.

Users who do not have MeetingPlace for Outlook installed, or those using the Click to Attend link, are required to login as a guest or profile user. Restricted meetings are only accessible to those who login as profile users.

- *Persist login information in browser cookies.* Users need to login the first time they use MeetingPlace for Outlook. This information is then stored in the form of cookies for automatic authentication during subsequent sessions.

- *Use integrated Windows authentication.* Users whose MeetingPlace user ID matches their Windows login ID will be authenticated as soon as they login to their workstation. This match must be identical and is case-sensitive. The MeetingPlace for Outlook server must be part of the same domain for this option to be enabled.

Users who do not have MeetingPlace for Outlook installed and are attending as invitees are prompted by IIS to login using their domain credentials.

If the domain credentials match, they are authenticated as MeetingPlace profile users. The system also remembers them in a cookie so that they do not have to authenticate themselves the next time.

If their domain authentication fails, they are allowed to log in as guest users. This option is not available if the meeting is restricted (i.e., limited to invited profile users only).

- *Use MeetingPlace Directory Services.* MeetingPlace Directory Services synchronizes with a company's corporate directory. Users who have MeetingPlace for Outlook installed in such an environment can schedule, invite, and attend meetings using directory lookup. If this lookup fails, they are unable to continue.

Users who do not have MeetingPlace for Outlook installed and are attending as invitees are prompted by IIS to login using their domain credentials.

If the domain credentials match, they are authenticated as MeetingPlace profile users. The system also remembers them in a cookie so that they do not have to authenticate themselves the next time.

If their domain authentication fails, they are allowed to log in as guest users. This option is not available if the

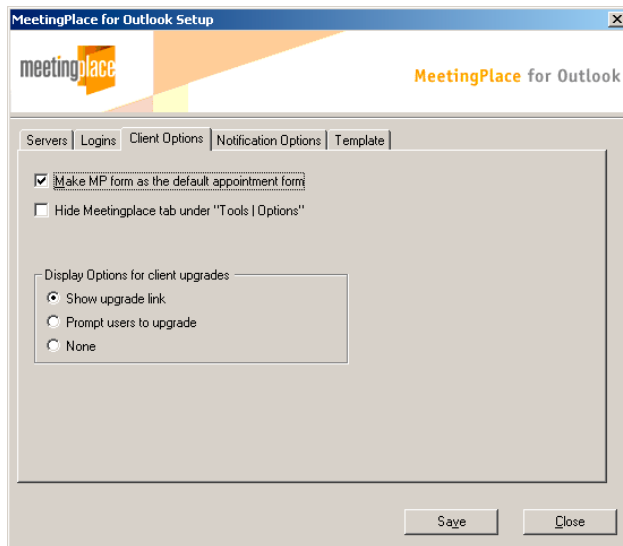
meeting is restricted (i.e., limited to invited profiled users only).

Note: To enable either Integrated Windows authentication or MeetingPlace Directory Services authentication, from the MeetingPlace Gateways Configuration Utility's **Agent Service** tab, select the **Web Server Authentication** checkbox. Refer to page 55 for more information.

2. Indicate the Hostname, Login, and Password for this system. When finished, click **Save**.

Client Options Tab

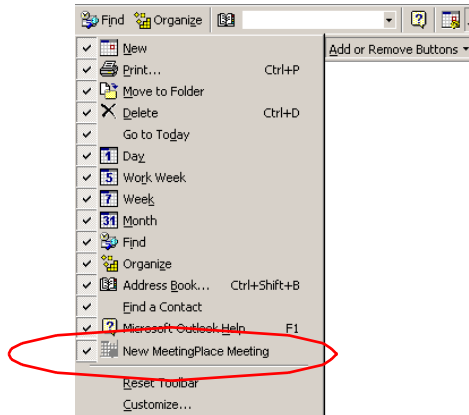
The Client Options tab includes information regarding the MeetingPlace form and MeetingPlace for Outlook Client upgrades.



1. Select the Client Options tab and determine the following default settings. When finished, click **Save**.

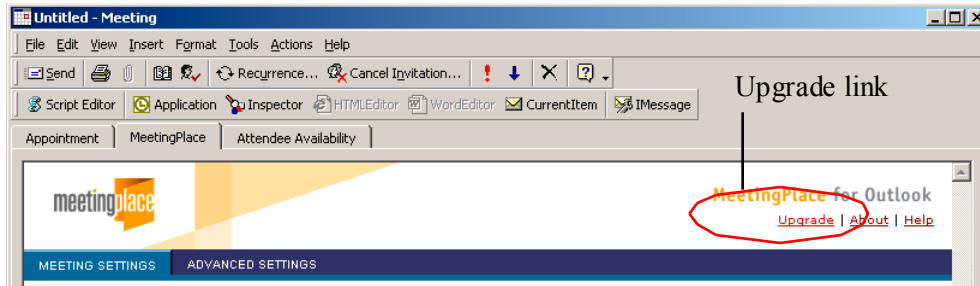
- *Make MP form as the default appointment form.*
Selecting this option enables your users to schedule MeetingPlace meetings whenever they open the default scheduling form.

If you clear this option, meeting schedulers must click the calendar icon at the top of their Outlook calendar to specify that they want to use the MeetingPlace scheduling form to schedule a meeting.



- *Hide MeetingPlace tab under Tools | Options.* Selecting this option hides the MeetingPlace tab under the **Tools | Options** menu. From here, users can choose to make the MeetingPlace meeting schedule form their default scheduling form, configure their default MeetingPlace server, and enable automatic authentication.
2. MeetingPlace for Outlook automatically detects when a newer version is available on the MeetingPlace server. Determine how to inform your users of MeetingPlace for Outlook Client upgrades by selecting an option from the following list:

- *Show upgrade link.* Selecting this option places an **Upgrade** link on the MeetingPlace scheduling form. Users click the **Upgrade** link to download an upgraded version. This is the default setting.



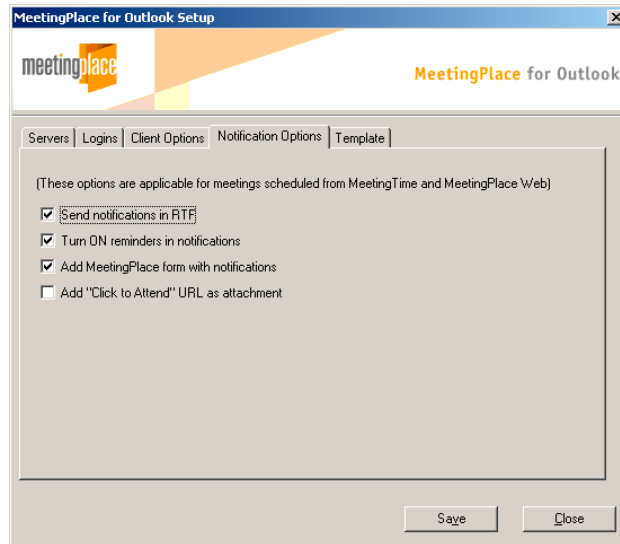
- *Prompt users to upgrade.* Selecting this option activates an upgrade prompt that alerts users whenever an upgrade is available. The prompt will appear everytime the user opens their MeetingPlace for Outlook until they choose to complete their upgrade.



- *None.* Users are not made aware of upgrades from MeetingPlace for Outlook if you select this option.
3. Click **Save** to save your settings.

Notification Options Tab

The Notification Options tab enables you to configure the receipt of notifications created by alternative scheduling clients.



1. Select the Notification Options tab and select the options you want to implement:
 - *Send notifications in RTF.* Select this option to send notifications in Rich Text Format (RTF). RTF notifications reveal formatting, such as bold, italics, and color, that you may have included in your notification templates.
 - *Turn ON reminders in notifications.* Selecting this option ensures that invitees receive a meeting reminder from Outlook before the start of their meeting.
 - *Add MeetingPlace form with notifications.* Selecting this option adds the MeetingPlace tab to the meeting notification so all invitees can review meeting information.

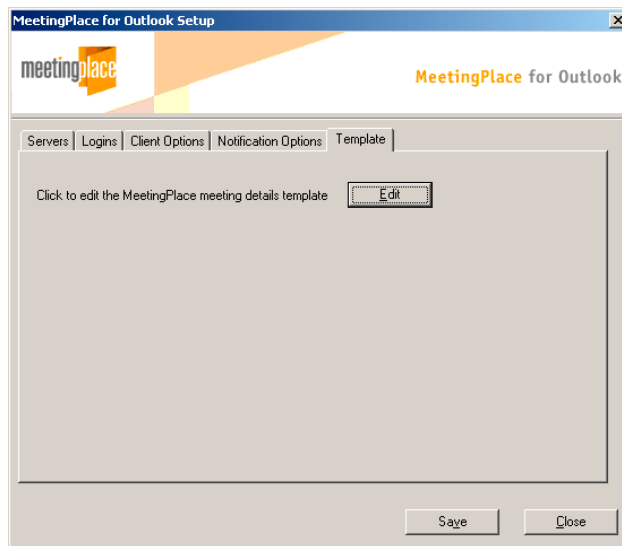
- *Add “Click to Attend” URL as attachment.* Selecting this option includes a Click to Attend URL as an attachment in your notifications. Some Exchange servers may block the receipt of attachments. As such, this option is turned off by default.

Note: If you selected to add either the MeetingPlace form or Click to Attend URL with your notifications, from the MeetingPlace Gateways Configuration Utility’s **Notification** tab, you must also select the **Attach Links as URL** option. See page 55 for more information.

Template Tab

The Template tab enables you to edit your MeetingPlace for Outlook notification templates.

1. Click **Edit** to begin editing your template. This opens your template in Wordpad. Refer to Chapter 5 for customization instructions. When finished, click **Save**, then **Close** to return to the MeetingPlace for Outlook installation.



- When the InstallShield Wizard reappears, select **Yes** to restart your server now, then click **Finish** to complete Setup.



- Test that MeetingPlace for Outlook is successfully connecting to the MeetingPlace server and your Exchange server by opening your Gateway SIM event log.

To open the Gateway SIM event log, right-click on the Latitude icon in the system tray and select **eventlog**. You should see “Logon successful to Exchange and MeetingPlace Notification Gateway.” If you are having trouble, check for error messages being logged to the Gateway SIM event log and Windows Event Viewer.

Distributing and Installing the MeetingPlace for Outlook Client

If your users are running Outlook on their local drive, they can quickly install the MeetingPlace for Outlook Client by running the *Setup.exe* program. This file was generated when you installed MeetingPlace for Outlook.

For initial deployment of the *Setup.exe* program, you can:

- E-mail this file to your users.
- Place the file on a shared network drive or a web site for your users to access.
- Use an automated distribution system, such as Microsoft Systems Management Server (SMS). Refer to page 49 for further information on this option.

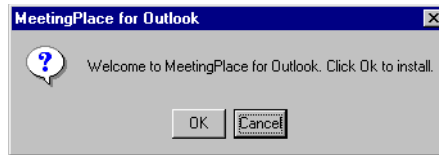
Notes:

- If your corporate antivirus software does not allow for the distribution of executable files consider alternate modes of distribution, such as disabling your antivirus software for the duration of time it takes to distribute the *Setup.exe* file to your users, or making the *Setup.exe* file available on a web server. Dispersal of subsequent upgrade information is dependent on how you configured this option in the Configuration Client Setup Utility. Refer to page 41 for more information
- In most instances, end users will not be able to load the MeetingPlace for Outlook Client on Windows 2000 machines unless they are given “Install rights” to the local machine.
- If you are planning on loading the MeetingPlace for Outlook Client on a Windows 2000 machine, it is recommended that you allow your network administrator to load the form using the **-admin** switch. Allowing an administrator to load the form using this switch will place the form on the machine. Subsequent logons by any new or existing user will trigger the form to be loaded for their profile as well.
- To remove the form the administrator must log onto the machine and use the Add/Remove programs utility to remove the form. Performing this action will result in the form being removed for all users of the machine.

Installing the MeetingPlace for Outlook Client on a Local Drive

To install the MeetingPlace for Outlook Client locally:

1. Make sure your Microsoft Outlook client has been shut down.
2. Run the *Setup.exe* file.
3. When the MeetingPlace for Outlook window appears, click **OK** to install.



4. To complete the installation, open or restart Outlook.

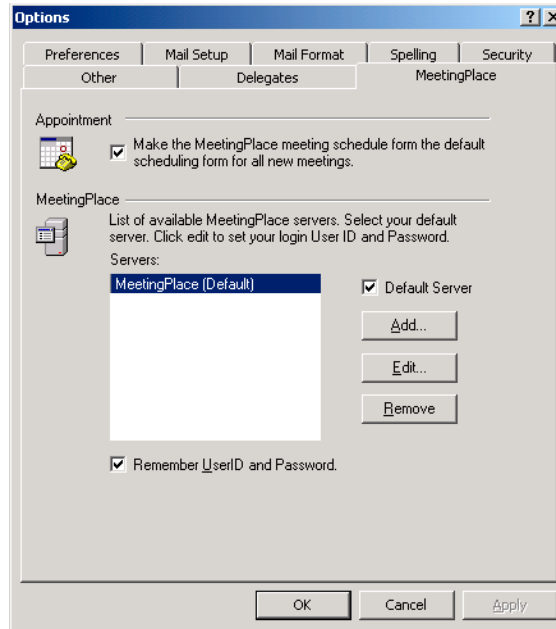
Users can now schedule meetings using the MeetingPlace scheduling form. For details, refer to Chapter 6, "Using MeetingPlace for Outlook".

Users with Multiple Outlook Profiles

Users with multiple Outlook profiles must set the MeetingPlace scheduling form as the default form manually. To set the default form manually:

1. From the Microsoft Outlook Calendar, go to Tools | Options. Select the MeetingPlace tab.

Note: This tab only appears if you configured it as such in the Configuration Client Setup Utility. Refer to page 42 for more information.



2. Select the box in the **Appointment** section. This makes the MeetingPlace scheduling form the default scheduling form for all new meetings. Click **Apply** to save your changes, then click **OK**.

Using Microsoft SMS to Distribute the MeetingPlace for Outlook Client

Microsoft SMS is an automated distribution system that enables you to remotely manage the distribution and installation of the MeetingPlace for Outlook Client. Specifically, this service can be used to:

- Install the MeetingPlace for Outlook Client on your users' systems
- Update your users' systems with any changes made in the Configure Client Utility (refer to Chapter 4 for more information on this utility).

To perform any of these actions, you will need to create a package and import *Setup.exe* into it. For more details, refer to the Microsoft SMS documentation.

Silent Installation

Administrators may choose to deploy MeetingPlace for Outlook without their users' intervention. To do so, MeetingPlace for Outlook can create a silent switch script, which can be deployed through a distribution tool, such as Microsoft SMS.

Note: Latitude Communications does not create or provide support for the scripting required to use automated distribution tools. Please contact Latitude Customization Services for assistance with such projects. Latitude Customization Services is not included as part of Full Care Support. Therefore, you will be charged on a time and materials basis.

4 Managing MeetingPlace for Outlook

Two utilities are available to help you manage MeetingPlace for Outlook:

- *MeetingPlace Gateway Configuration Utility*. Used for managing MeetingPlace for Outlook, the MeetingPlace Agent Service, and the MeetingPlace Gateway SIM (System Integrity Manager) Administration Utility.
- *Configure Client Setup Utility*. Used to change any of the settings in the MeetingPlace for Outlook Client setup files, including adding an entry for an additional MeetingPlace for Outlook gateway.

MeetingPlace Gateway Configuration Utility

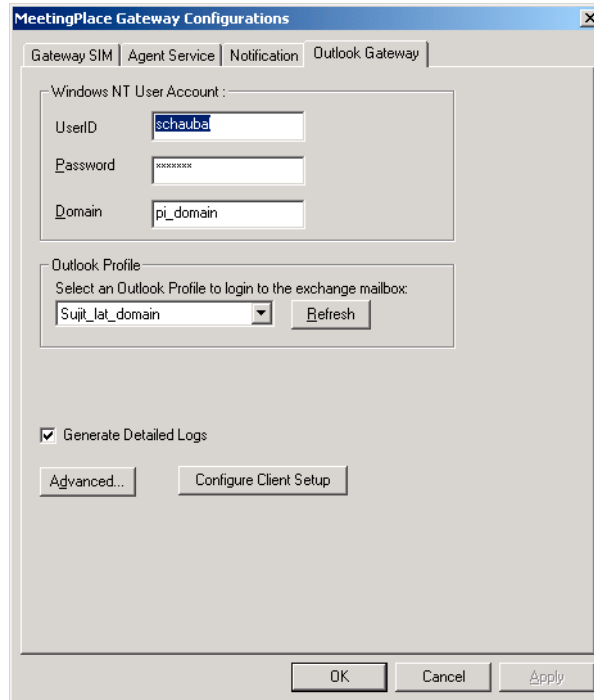
The MeetingPlace Gateway Configuration Utility enables you to change the configuration of MeetingPlace for Outlook, the MeetingPlace Agent Service, and the MeetingPlace Gateway SIM.

To access this utility, go to the Control Panel (Start | Settings | Control Panel) and double-click the **MeetingPlace Gateways** icon.

The following sections describe the settings in this management utility.

Outlook Gateway Tab

The Outlook Gateway tab enables you to change some of the settings that were determined during the MeetingPlace for Outlook installation, such as the Exchange server hostname and the password for the Windows 2000 user account.



Each field in the Outlook Gateway tab is explained below:

- *Windows NT User Account.* The User ID, password, and domain for the Outlook Gateway account on the Windows 2000 server.
- *Outlook Profile.* The Outlook profile used to login to the Exchange mailbox. Each Outlook profile is preconfigured to connect with a particular Exchange server and mailbox. Clicking **Refresh** updates the list of profiles available.

- *Generate Detailed Logs.* Whether detailed entries should be logged to the Gateway SIM log. This is used for troubleshooting purposes and should not be selected.
- *Advanced.* From the **Advanced** button, you may specify how you want MeetingPlace for Outlook to handle undeliverable messages. You may also specify a time zone for your MeetingPlace server.

Advanced Configuration

Messages

Specify how you want to handle messages sent to the gateway:

Ignore Message Delete Message

Forward to Administrator:

Gateway Service

Specify how often the gateway service will retry to recover from a lost connection to exchange server.

Indefinitely Never

Specified Times:

Time to wait before retrying: (In seconds)

Specify how often the gateway will recycle the service process.

Recycle service every: (In minutes)

Timezone

Select the local timezone for the gateway.

OK Cancel

Each field is described below:

Messages. Specify how you want MeetingPlace for Outlook to handle undeliverable meeting invitations and non-meeting responses in its Inbox.

- *Ignore Message.* Selecting this option ignores all undeliverable meeting invitations and non-meeting responses. Such messages are left in the Inbox.

- *Delete Message.* Selecting this option deletes all undeliverable meeting invitations and non-meeting responses sent to the MeetingPlace for Outlook gateway mailbox.
- *Forward to Administrator.* Selecting this option forwards all undeliverable meeting invitations and non-meeting responses to the e-mail address indicated in the field provided.

Gateway Service. Specify how often MeetingPlace for Outlook will try to recover from a lost connection to the Exchange server.

- *Indefinitely.* Selecting this option indicates that you wish to continue having MeetingPlace for Outlook attempt to recover the connection to the Exchange server until the connection is restored.
- *Never.* Selecting this option indicates that you wish to manually attempt to recover any lost connections between MeetingPlace for Outlook and the Exchange server.
- *Time to wait before retrying.* Indicate the number of seconds the MeetingPlace for Outlook service should wait between connection restoration attempts.
- *Recycle service every.* Indicate the number of minutes the MeetingPlace for Outlook service should wait before recycling.

Timezone. Select the local time zone for the MeetingPlace for Outlook gateway. Your users send and receive their meeting invitations calibrated to this time zone.

- *Configure Client Setup.* Opens the Configure Client Setup Utility, where you can modify settings relating to servers, logins, and how to handle client updates. You can also edit notification templates from this utility. For more information, refer to page 58.

You must restart your Outlook service to implement any changes made in the Outlook Gateway tab.

Note: The Outlook service automatically restarts itself every four hours.

Agent Service Tab

The MeetingPlace Agent Service establishes communication with the MeetingPlace system via MeetingPlace Web. From the Agent Service tab in the MeetingPlace Gateway Configurations utility, you can:

- Enable web server authentication
- Provide secure connections using SSL

For further information on the Agent Service tab, please refer to the *MeetingPlace Web 3.0 System Manager's Guide*.

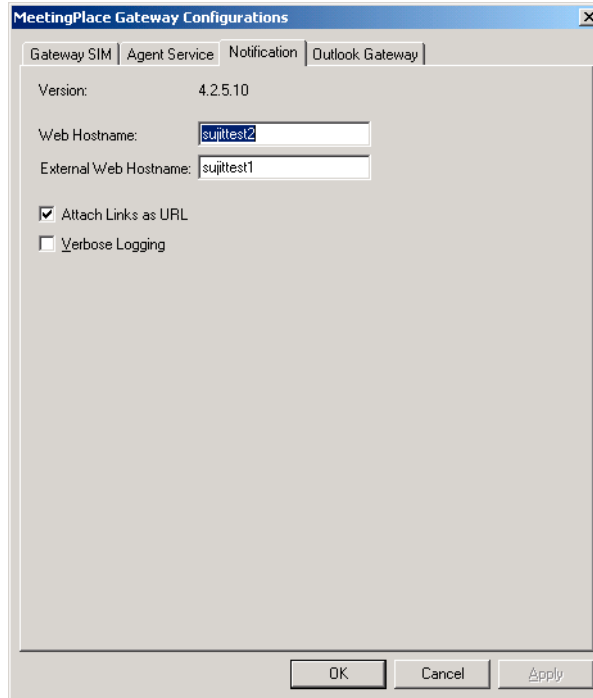
If you have MeetingPlace for Outlook installed with MeetingPlace Web 4.0, Agent Service functionality is accessible from the MeetingPlace Web Administration tool. For more information, refer to the *MeetingPlace Web 4.0 System Manager's Guide*.

In addition to setting the appropriate parameters in the MeetingPlace Web Administration tool, to enable web server authentication in MeetingPlace for Outlook with MeetingPlace Web 4.0, set the following registry setting:

Latitude/MPWeb/MPAgent/RemoteUserAllowed=1

Notification Tab

The Notification Tab enables you to configure the hostnames of the MeetingPlace Web servers required for MeetingPlace for Outlook notifications.



Each field in the Notification tab is explained below:

Version. The version of the MeetingPlace Notification Gateway.

Web Hostname. The hostname of the MeetingPlace Web server used for internal meetings.

Note: If the MeetingPlace Web hostname changes, other items such as notification templates will be affected.

External Web Hostname. The hostname of the MeetingPlace Web server used for external meetings. This server is outside your private corporate network, in the DMZ. If left blank, notifications will default to the web server indicated in the Web Hostname field.

Attach Links as URL. Whether a Click to Attend URL link is included in notifications for meetings that are scheduled using MeetingTime or MeetingPlace Web. This option must also be selected in the following circumstances:

- From the Configuration Client utility's **Notification Options** tab, you selected the **Add MeetingPlace form with notifications** option.
- From the Configuration Client utility's **Notification Options** tab, you selected the **Add Click to Attend URL as attachment** option.

If you have a segmented meeting access configuration, users outside your organization will access a separate Click to Attend link directing them to the external web server.

Note: MeetingPlace Web must be installed and running in order for URL links to work. If you do not have MeetingPlace Web installed, leave this option unchecked.

Verbose Logging. Whether detailed entries should be logged to the Gateway SIM log. To enhance performance, verbose logging should be turned off.

Gateway SIM Tab

The Gateway System Integrity Manager (SIM) improves the reliability and serviceability of your MeetingPlace for Outlook gateway by:

- Detecting gateway outages and logging these errors to the MeetingPlace Alarm Table
- Notifying you via alarm outdial when a problem with the gateway machine has been detected

- Enabling a MeetingPlace support representative to remotely administer and diagnose your MeetingPlace for Outlook gateway

For further information on the Gateway SIM tab, please refer to the *MeetingPlace Web 3.0 System Manager's Guide*.

Using the Configure Client Setup Utility

MeetingPlace for Outlook requires little maintenance once installed. However, if you need to change any of the settings in the MeetingPlace for Outlook Client setup files, the Configure Client Setup Utility enables you to do this.

The Configure Client Setup Utility is accessible from the MeetingPlace Gateway Configuration Utility. To access this utility, go to the Control Panel (Start | Settings | Control Panel) and double-click the **MeetingPlace Gateways** icon. From there, select the **Outlook Gateway** tab.

Use the Configure Client Setup Utility when you need to:

- Update your users' systems with MeetingPlace for Outlook Client updates
- Add an entry for an additional MeetingPlace for Outlook gateway (adding another MeetingPlace for Outlook gateway is only done when you have two or more MeetingPlace servers that are not networked together and you want your users to be able to schedule meetings on each MeetingPlace server using MeetingPlace for Outlook)
- Modify your users' login method
- Specify whether to use the MeetingPlace scheduling form as the default scheduling form
- Customize meeting invitations for meetings scheduled using the MeetingPlace for Outlook scheduling form

- Select how your users will be made aware of new MeetingPlace for Outlook upgrades
- Update your organization's DMZ information

Refer to the “The Configure Client Setup Utility” section on page 36 for detailed instructions on using this utility.

Any time you make changes in the Configure Client Utility, a new client setup program (*Setup.exe*) is generated. If your company uses an automated distribution service, such as Microsoft SMS, you may use this service to update your users' systems with any changes you make in the Configure Client Setup Utility as long as your end users' workstations are not locked down. Refer to Chapter 3 for more information about using such services.

Restart your Outlook service to implement any changes made in the Outlook Gateway tab. If you modified any of the following, distribute the generated *Setup.exe* file to your users.

- Any changes in the **Servers** tab
- The following changes in the **Client Options** tab:
 - Selecting or clearing **Make MP form as the default appoint form**
 - Selecting or clearing **Hide MeetingPlace tab under Tools | Options**

Setup.exe updates your user's systems with the changes you made once they run the newly generated file.

System Manager Agents

System Manager Agents are system-wide parameters configurable in MeetingTime 2001 (release 4.3) and later. When these parameters are configured, users receive e-mail notifications regarding the following:

- No-show recurring meeting
- Recurring meeting ending

Note: For more information on how to configure System Manager Agents, refer to the “Configuring System Manager Agents” section in Chapter 4 of either the *MeetingPlace 2001 System Manager’s Guide* or the *MeetingServer System Manager’s Guide*.

No-Show Recurring Meeting

If a recurring meeting has no attendance for more than a pre-specified number of periods, an e-mail notification is sent to the meeting organizer suggesting that they cancel the remainder of the recurring meeting chain.

If the meeting was scheduled from Outlook, the notification includes a text message suggesting that the user cancel the meeting chain from their Outlook calendar.

If the meeting was scheduled from MeetingPlace Web or MeetingTime, the notification includes a **Click here to Cancel Meetings** link that leads the user to a cancellation page on MeetingPlace Web.

Recurring Meeting Ending

If a recurring meeting chain is within a pre-specified number of periods before expiration, an e-mail notification is sent to the meeting organizer. The notification informs the meeting organizer that the chain is set to expire and reminds them to schedule another recurring meeting if the chain is to continue.

If the meeting was scheduled from Outlook, the notification suggests scheduling another recurring chain via Outlook.

If the meeting was scheduled from MeetingPlace Web or MeetingTime, the notification includes a **Click here to Schedule Another Series** link that leads the user to the scheduling page where they can renew the meeting.

No other notifications are sent out as the recurring meeting continues towards its expiration.

Note: If the two recurring meeting triggers overlap, the no-show recurring meeting trigger overrides the recurring meeting ending trigger. The scheduler only receives the no-show notification.

Remote Access Monitoring

MeetingPlace for Outlook enables the System Manager to remotely monitor gateway activity on any chosen server. This is accomplished via an Internet Explorer-specific HTML file located at <drive>:\Latitude\mpweb\mpoutlook\MPOLPerf.html.

Changing the server name in the HTML file provides information for that particular server. Parameters that can be monitored include:

- Number of notifications per second
- Number of seconds per notification
- Service state (up/down)
- Total calendar items
- Total notifications sent (since service started)

This file does not contain server information. To view server information, you must view the HTML file on that particular machine. If this file is viewed from another machine, it will display information relevant to the local machine.

5

Customizing Meeting Notifications

MeetingPlace for Outlook enables you to customize the meeting notifications that are sent out when you schedule a meeting. Specifically, this feature allows you to:

- Take out information you want removed from notifications
- Insert information that isn't already included in notifications
- Specify the order you want information to appear in notifications
- Include customizable text in notifications, such as information about your company, instructions on how to attend MeetingPlace meetings, and alternate MeetingPlace phone numbers

IMPORTANT: You must manually configure the Web link pointing to your MeetingPlace Web hostname and External Web hostname (for external servers in your DMZ) in the *MPmessage.rtf*, *mpMsgRsvl.rtf*, *notifyschedule.tpl*, and *notifyreschedule.tpl* notification template files. Refer to the relevant sections for instructions.

About the Meeting Notification Templates

MeetingPlace for Outlook comes with five templates that are used to generate the meeting notifications sent to your users. Each of these templates contain tags and text that identify the information that should appear in a notification. As a notification is generated, MeetingPlace for Outlook or the MeetingPlace server replaces the tags with the appropriate information from its database.

For Meetings Scheduled Using Outlook

There are two notification templates used for meetings scheduled from Outlook:

- *MPmessage.rtf*—An editable Rich Text Formatting (RTF) file used to generate notifications for meetings scheduled using MeetingPlace for Outlook
- *mpMsgRsvl.rtf*—An editable RTF file used to generate notifications for reservationless meetings scheduled using MeetingPlace for Outlook

For Meetings Scheduled Using MeetingPlace Web or MeetingTime

There are three notification templates used for meetings scheduled using MeetingPlace Web or MeetingTime:

- *NotifySchedule.tpl*—An editable RTF file used to generate notifications for meetings scheduled using MeetingTime or MeetingPlace Web
- *NotifyReschedule.tpl*—An editable RTF file used to generate update notices for meetings that have been rescheduled using MeetingTime or MeetingPlace Web
- *NotifyCancel.tpl*—An editable RTF file used to generate cancellation notices for meetings that have been cancelled using MeetingTime or MeetingPlace Web

Customizing the MeetingPlace for Outlook Template Files

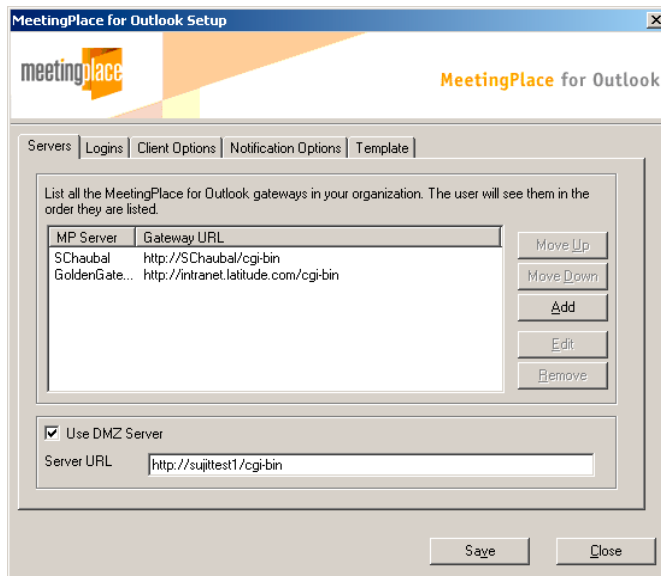
Customizing the *MPmessage.rtf* and *mpMsgRsvl.rtf* files adds or removes information from meeting invitations originating from

Outlook. Additionally, the Rich Text Format support allows you to use bold, italics, color, etc. in your meeting notifications.

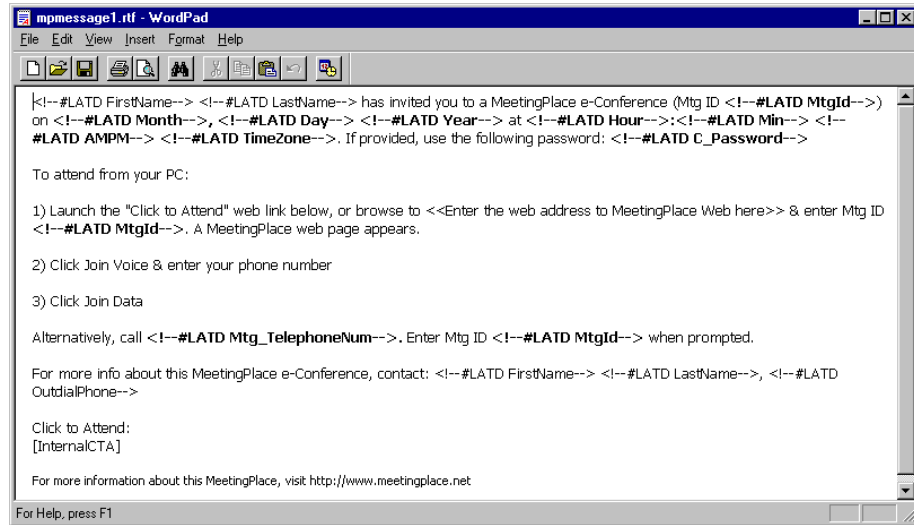
Tip: Before customizing *MPmessage.rtf* or *mpMsgRsvl.rtf*, it is recommended that you save a copy of them to the <drive>:\Latitude\MPWeb\mpoutlook directory as *MPmessage_backup.rtf* or *mpMsgRsvl_backup.rtf*.

To customize the *MPmessage.rtf* file:

1. Go to the Control Panel (Start | Settings | Control Panel) and double-click the **MeetingPlace Gateways** icon. From there, select the **Outlook Gateway** tab.
2. From the Outlook Gateway tab, click **Configure Client Setup**. The Configure Client Setup Utility opens.



3. Select the **Template** tab and click the **Edit** button. The *MPmessage.rtf* file opens in Wordpad.



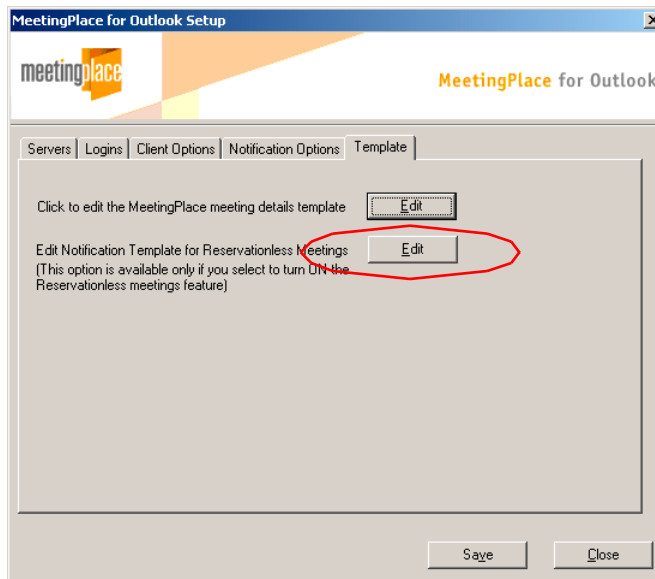
4. From this file, add or delete text or tags. This adds or removes information from the meeting invitation. If desired, customize your notifications to include bold, italics, color, etc. Refer to Appendix A for a list of available tags.
5. When finished, click **Save** and close Wordpad.
6. From the Configure Client Setup Utility, click **Save**, then click **Close**.

Note: If changes do not appear, restart the MeetingPlace Agent by navigating to Start | Settings | Control Panel | Services. Right-click on the MeetingPlace Agent Service and select restart.

To customize the *mpMsgRsvl.rtf* file:

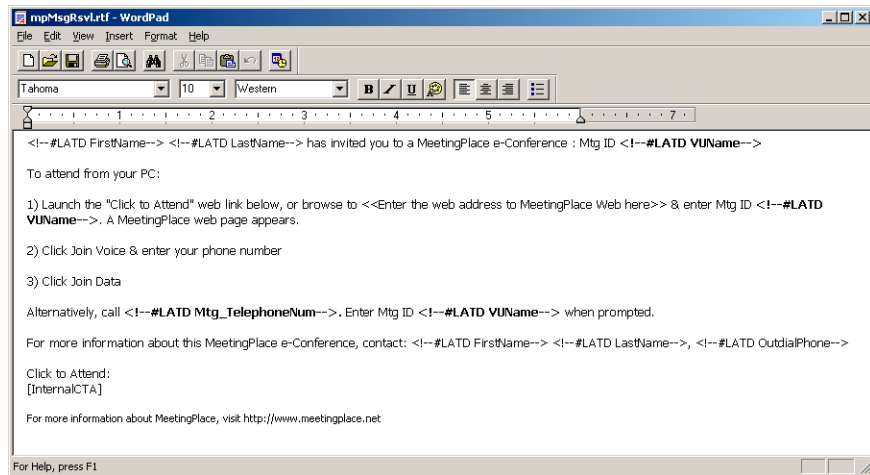
Note: It is unlikely that you will need to modify this template. This section is provided for informational purposes only.

1. Go to the Control Panel (Start | Settings | Control Panel) and double-click the **MeetingPlace Gateways** icon. From there, select the **Outlook Gateway** tab.
2. From the Outlook Gateway tab, click **Configure Client Setup**. The Configure Client Setup Utility opens.
3. Select the **Template** tab and click the **Edit** button next to the reservationless option. The *mpMsgRsvl.rtf* file opens in Wordpad.



- From this file, add or delete text or tags. This adds or removes information from the meeting invitation.

Note: Do not add any date or time tags to this template. As reservationless meetings are not formally “scheduled”, this information is not available from MeetingPlace for Outlook.



- When finished, save the file and close Wordpad.
- From the Configure Client Setup Utility, click **Save** then click **Close**.

To configure the MeetingPlace Web hostname web link:

- Open the Configure Client Setup Utility and select the **Template** tab.
- Determine whether you want to edit the MeetingPlace meeting details template or the notification template for reservationless meetings. Click the **Edit** button next to the appropriate option. The file opens in WordPad.

3. Scroll down to 1).

Replace <<Enter the web address to MeetingPlace Web here>> with the hostname of your MeetingPlace Web server. For example, `http://companyxhostname`, where `companyxhostname` is the hostname of your MeetingPlace Web server.

4. Once you have made your changes, save your file and close WordPad.
5. From the Configure Client Setup Utility, click **Save** then click **Close**.

Customizing Template Files from Other Scheduling Clients

Notifications generated as a result of meetings scheduled using MeetingPlace Web or MeetingTime use the following three template files. To access these files, go to <drive>:\Latitude\mpweb\shared components\MeetingPlace Notification Gateway:

- *NotifySchedule.tpl*
- *NotifyReschedule.tpl*
- *NotifyCancel.tpl*

MeetingPlace for Outlook enables your users to receive these notifications in RTF format. To ensure the receipt of RTF notifications, ensure the following:

- From the Configure Client Utility's **Notification Options** tab, the **Send notifications in RTF** option is selected
- The RTF setting on your Exchange server is turned on for the MeetingPlace for Outlook gateway mailbox

To customize the template files:

Tip: Before customizing any of these template files, it is recommended that you save a copy of them to the <drive>:\Latitude\mpweb\shared components\MeetingPlace Notification Gateway directory.

1. Using Wordpad, open the .tpl template file you want to customize.
2. Make any modifications by adding or deleting text or tags. This adds or removes information from the meeting notification. You may also customize your notification to include bold, italics, color, etc. Refer to Appendix A for a list of available tags.

Tip: Place more important information at the top of the template. Any item you add will appear in the same location in the meeting notification.

3. Save the template as a text file and make sure your word processing program does not change the file's .tpl extension.

Figure 5-1 displays the *notifyschedule.tpl* template. Figure 5-2 displays the meeting notification that has been generated from this template.

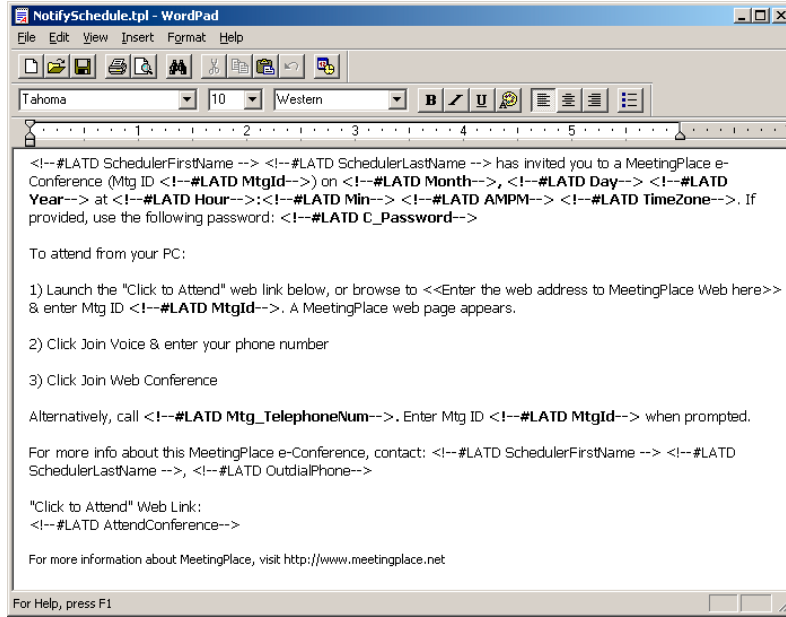


Figure 5-1 Example of a Meeting Notification Template

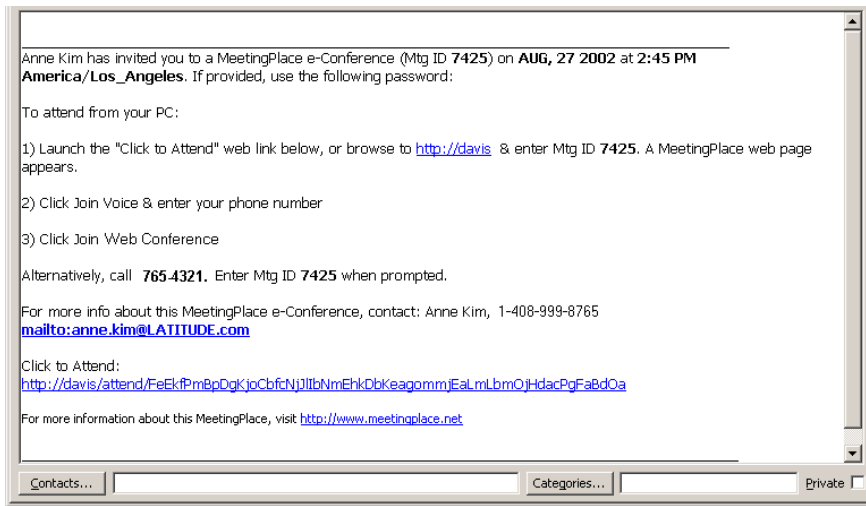


Figure 5-2 Example of a Meeting Notification

To configure the MeetingPlace Web hostname web link:

1. Using Wordpad, open the *notifyschedule.tpl* or *notifyreschedule.tpl* template file.
2. Scroll down to 1).

Replace <<Enter the web address to MeetingPlace web here>> with the hostname of your MeetingPlace Web server. For example, `http://companyxhostname`, where `companyxhostname` is the hostname of your MeetingPlace Web server.

3. Save the template as a text file and make sure your word processing program does not change the file's .tpl extension.

Adding Instructions and Alternate MeetingPlace Phone Numbers to Your Notifications

To help your users attend meetings, consider adding the following instructions and information in your notifications:

- Instructions on how to attend meetings and access attachments
- Any alternate phone numbers for your MeetingPlace server, such as a toll free or in-company extension number
- Special instructions for multiserver meetings
- A listing of invited meeting attendees
- Meeting recording information.

To include any of this information, refer to Table 5-1 for a list of tags. Add the appropriate tags to the *NotifySchedule.tpl* and *NotifyReschedule.tpl* template files. The tags are replaced with the appropriate information from the MeetingPlace database when a notification is generated.

In addition, use MeetingTime to enter your customized instructions and alternate MeetingPlace phone numbers into the MeetingPlace database. Refer to page 74 for instructions.

Table 5-1 Instruction and Alternate Phone Number Tags

Tag	Purpose
<!--#LATD AttendMeetingHint -->	Inserts any text you enter in the How to Attend Meeting parameter
<!--#LATD MeetingNotesHint -->	Inserts any text you enter in the How to Access MeetingNotes parameter
<!--#LATD C_AltPhoneNumName1 -->	Inserts any text entered in the first Label for Notifications parameter
<!--#LATD C_AlternatePhoneNum1 -->	Inserts any phone number entered in the 1st Alternate Ph Number parameter
<!--#LATD C_AltPhoneNumName2 -->	Inserts any text entered in the second Label for Notifications parameter
<!--#LATD C_AlternatePhoneNum2 -->	Inserts any phone number entered in the 2nd Alternate Ph Number parameter
<!--#LATD C_AltPhoneNumName3 -->	Inserts any text entered in the third Label for Notifications parameter
<!--#LATD C_AlternatePhoneNum3 -->	Inserts any phone number entered in the 3rd Alternate Ph Number parameter
<!--#LATD MultiServerHelpText <i>This meeting will be held on the following MeetingPlace servers.</i>	Inserts any text entered after MultiServerHelpText. The suggested text for this tag is displayed in italics.
<i>Dial the phone number of the server closest to your location. --></i>	This tag only appears in notifications for multiserver meetings. Use this tag in conjunction with the ListMultiServers tag (listed next).
<!--#LATD ListMultiServers -->	Inserts the name and phone number of the other MeetingPlace servers that are involved in the multiserver meeting. This tag should always follow the MultiServerHelpText tag.
<!--#LATD ListInvitees -->	Inserts a list of the invited attendees.

Tag	Purpose
<!--#LATD fRecordConference -->	Inserts information on whether or not the meeting is scheduled to be recorded.
<!--#LATD WhoCanListen -->	Inserts who can access the meeting recording (none, anyone, MeetingPlace users, or invited users).

To include instructions in your notifications:

1. Verify that the instruction tags are in the notification templates you want to customize. By default, these tags should already be in the templates.
2. Open MeetingTime and log in to the MeetingPlace server.
3. Open the Register Book and select the **Configure** tab.
4. From the left side of the window, under **Company Specific Information**, select the **Company Information** topic and then click **Query**.
5. From the right side of the window, click in the value area of the **How to Attend Meeting** parameter and enter your customized information, such as:

To attend this meeting, call [*insert MeetingPlace phone number*] at the time of the meeting and follow the prompts. Refer to the information contained in this notification for meeting details.

6. When finished, click **OK**.
7. To customize the text on how to access meeting materials, click in the value area of the **How to Access MeetingNotes** parameter and enter text in the box, such as:

MeetingNotes is a collection of meeting materials, such as recordings that you can

listen to over the phone and presentations that you can request to have sent to you via e-mail.

To access MeetingNotes, call MeetingPlace at [insert MeetingPlace phone number], listen to the prompts, press 3, and then enter the month, date, and meeting ID for the meeting you want to access.

8. Click **OK** and then **Save Changes**.

To display alternate phone numbers for your MeetingPlace server:

1. Place the Alternate Phone Number tags into each notification template. These tags are listed in Table 5-1.
 - You do not need to use all three sets of these tags if your MeetingPlace server only has one or two alternate phone numbers.

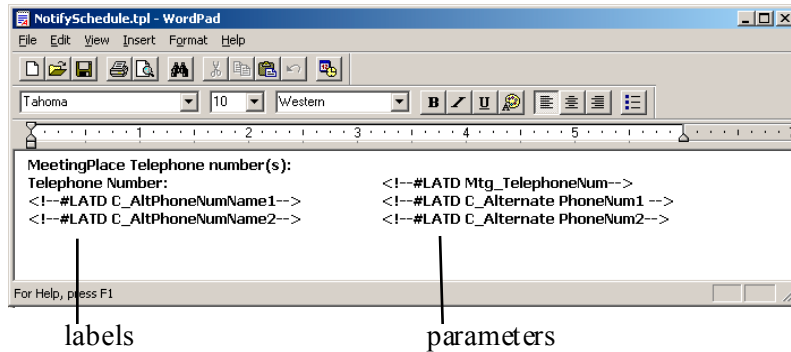


Figure 5-3 A Notification Template with Alternate Phone Number Tags

2. From the MeetingTime Configure tab, under **System Configuration**, select the **Telephony Access** topic and then click **Query**.

3. Click in the value area of the **1st Alternate Ph Number** parameter and enter the phone number you want to appear in the notifications.
4. Click in the value area of the **Label for Notifications** parameter and enter a label for the number, such as `Toll Free Number` or `Internal Extension Number`.
5. If your MeetingPlace server has a second or third alternate number, repeat the steps above using the **2nd** and **3rd Alternate Ph Number** parameters.
6. Click **Save Changes**.

Adding and Deleting the Click to Attend Link

Notes: The *MPmessage.rtf*, *mpMsgRsvl.rtf*, *notifyschedule.tpl* and *notifyreschedule.tpl* template files must contain the attend tag. By default, these template files already contain this tag.

To add the Click to Attend link to your meeting notifications:

1. Open one of the above template files using Wordpad and scroll to the bottom of the page. Enter the `<!--#LATD AttendConference -->` tag at the bottom of the page.
2. Go to the MeetingPlace Gateway Configuration Utility (Start | Settings | Control Panel) and select the **Notification** tab. Add the **MeetingPlace Web hostname** and the **External Web hostname** (if required). Refer to page 56 for more information.
3. Save the template as a text file, and make sure your word processing program does not change the file's .tpl extension.
4. Open the remaining template files and repeat the steps above. When finished, restart your Outlook and notification service to implement changes.

To delete the Click to Attend link from your meeting notifications:

1. Open one of the above template files using Wordpad and scroll to the bottom of the page. Delete the following:
 - The `<!--#LATD AttendConference -->` tag
 - Any references to the Click to Attend link
2. Go to the MeetingPlace Gateway Configuration Utility (Start | Settings | Control Panel) and select the **Notification** tab. Delete your values in **MeetingPlace Web hostname** and **External Web hostname**.
3. Save the template as a text file and make sure your word processing program does not change the file's .tpl extension.
4. Open the remaining template files and repeat the steps above. When finished, restart your Outlook and notification service to implement changes.

6 Using MeetingPlace for Outlook

After installing the MeetingPlace for Outlook Client, you can use a new form in your Outlook calendar to schedule MeetingPlace meetings.

The topics covered in this chapter include:

- Scheduling MeetingPlace meetings using Outlook
- Attending MeetingPlace meetings using Outlook
- Solving end user issues—Provides information on how to save meeting invitations and specify the default scheduling form used by Outlook

Scheduling Meetings

After installing the MeetingPlace for Outlook Client, a MeetingPlace tab appears in the Outlook scheduling form. This enables you to schedule MeetingPlace meetings.

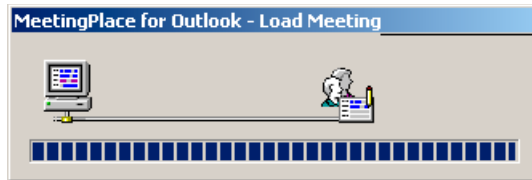
Your Microsoft Outlook client must be connected to your network in order to schedule MeetingPlace meetings.

To schedule a meeting:

1. Open your Outlook calendar and double-click on a time. The scheduling form opens.

Note: MeetingPlace prompts you for your user ID and password the first time you schedule a MeetingPlace meeting unless you selected MeetingPlace Directory Services or Integrated Windows Authentication as your log in authentication option. Refer to the “Logins Tab” section on page 38 for more information.

2. From the **Appointment** tab, enter the necessary meeting information, such as the subject (meeting name), date, start time, and end time for your meeting.
3. When finished, select the **MeetingPlace** tab. A progress bar displays until the MeetingPlace tab opens.



4. From the MeetingPlace tab, select **Make this a MeetingPlace meeting** then fill in the meeting details. Each parameter is defined in Table 6-1.

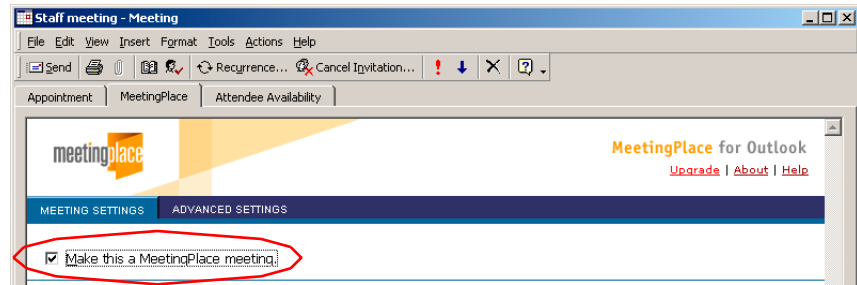


Table 6-1 Meeting Detail Parameters:

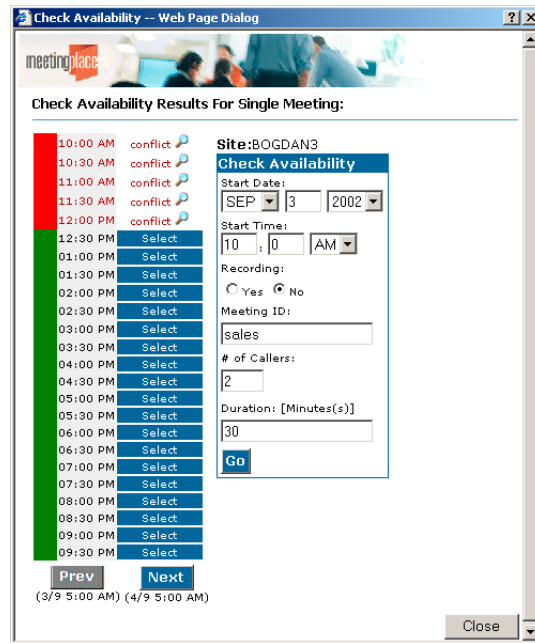
Field	Description
Date	The date of the meeting
Time	The time the meeting will start
Duration	How long the meeting will last
Frequency	How often the meeting will occur: once, daily, weekly, etc.
# of Occurrences	How often the meeting will recur. For example, if the Frequency parameter is set to weekly, how many weeks will this meeting occur?
Meeting Name	The name of the meeting. If a meeting name is not entered, MeetingPlace enters the scheduler's user ID by default.
Meeting ID	An opportunity for the meeting scheduler to enter an appropriate or easy to remember numeric or vanity meeting ID, such as Staff. If a meeting ID is not entered, MeetingPlace generates one automatically.
# of Callers	The number of ports reserved for this meeting
Billing Code	For organizations with various billing codes. Leave blank if not applicable.
MeetingPlace Server	The MeetingPlace server where this meeting will be held.

Notes:

- If you decide later that you do not require MeetingPlace resources for this meeting, disassociate them from the meeting. Refer to page 90 for instructions.
- Recurring meeting chains cannot be disassociated, but single meetings within a recurring meeting chain can.

5. When finished filling in your meeting details, click **Check Availability** to ensure that the requested time, duration, meeting ID, recording space, and number of locations are available on the MeetingPlace server. A dialog box opens alerting you to any potential conflicts.

- To display a dialog box with the relevant error message, click the magnifying glass icon
- To select an available meeting time, click **Select**
- To check availability according to a new set of parameters, modify your parameters and click **Go**
- When finished, close the Check Availability dialog box



6. To set additional MeetingPlace settings, click **Advanced Settings**. Each parameter is defined in Table 6-2.

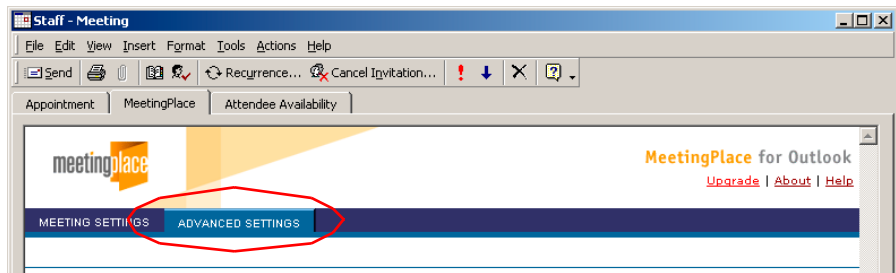
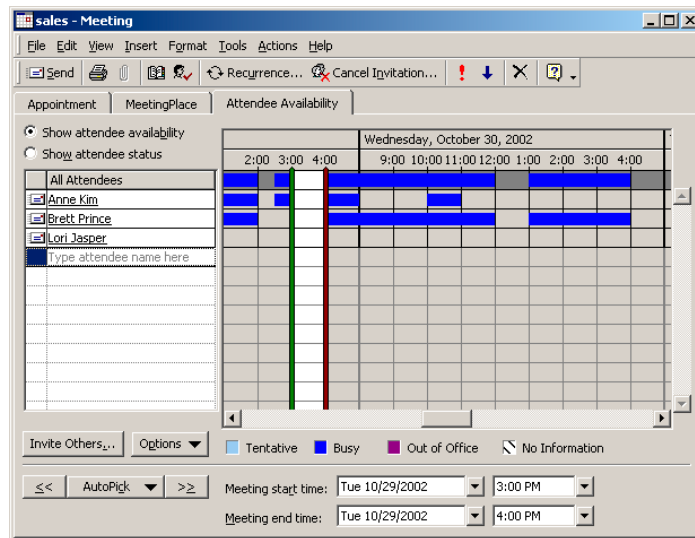


Table 6-2 Advanced Settings Parameters

Parameter	Description	Options
Entry Announcement	Whether or not attendees are announced when they enter the meeting	Beep+ Name, Beep Only, or Silent
Departure Announcement	Whether or not attendees are announced when they exit the meeting	Beep+Name, Beep Only, or Silent
Password Required	Whether a password is required to enter the meeting.	Yes or No
Meeting Password	The password for the meeting	If you selected Yes in the Password Required parameter, type your password here. This information is sent to invited attendees in the meeting notification.
Display Meeting to Everyone	Whether this meeting is accessible from MeetingPlace Web's Find Meeting page	Yes . This is a public meeting and is searchable through MeetingPlace Web No . This meeting is only displayed to invited attendees or those who know the meeting ID
Who Can Attend Meeting	Determines who is able to attend this meeting	MeetingPlace Profile Users . Attendees require their user ID and password to access this meeting Anyone . Guests are also able to access this meeting
Who can access MeetingNotes	Determines who will have access to any attachments or recordings from this meeting	MeetingPlace Profile Users . Users require their user ID and password Anyone . Guests can also able to access MeetingNotes None . No one can access MeetingNotes

- To invite attendees, go to the **Attendee Availability** tab, then enter attendees names in the **All Attendees** column.



- When finished, click **Send**. The meeting is scheduled on MeetingPlace, meeting invitations are sent to the invited attendees, and the meeting details automatically populate your Outlook calendar.

To Schedule a Recurring Meeting

When scheduling a recurring meeting, you must indicate the meeting's recurrence pattern. Not all recurrence patterns are supported. If you select an unsupported pattern, MeetingPlace displays a warning. If you try to schedule an unsupported pattern, MeetingPlace displays an error. Table 6-3 provides a list of unsupported recurrence patterns along with their relevant error message.

Note: These recurrence restrictions only apply to meetings scheduled with MeetingPlace. They do not impact Outlook-only meetings.

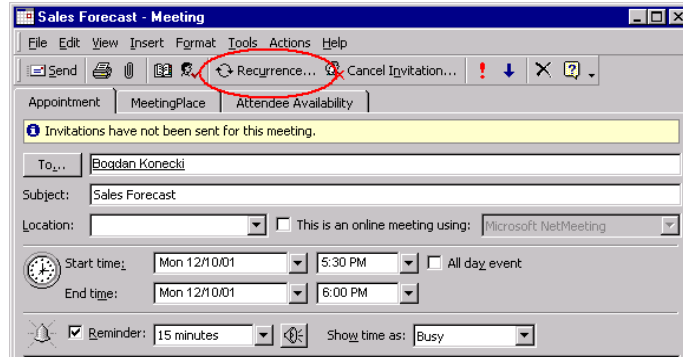
Table 6-3 Unsupported Recurrence Patterns

Recurrence Pattern	Error Message
Daily with Every “n” day(s) , where “n” is greater than one.	Daily meetings can only be scheduled once every day.
Daily with End after: “n” occurrences , where “n” is greater than 100.	Daily meetings can only be scheduled for a maximum of 100 occurrences.
Weekly with Recur every “n” week(s) , where “n” is greater than two	Weekly meetings can occur every one or two weeks only
Weekly with more than one day of the week selected.	Weekly meetings can only be scheduled for only one day in a week
Monthly with Day “x” of every “n” month(s) , where “n” is greater than one.	Monthly meetings can only be scheduled every month
Monthly by day, weekday or weekend day.	Monthly meetings can only be scheduled for a specific day in a week
Yearly	Invalid recurrence type: Yearly

To schedule a recurring meeting:

1. Open your Outlook calendar and double-click on a time. The scheduling form opens.
2. From the **Appointment** tab, enter the necessary meeting information, such as the subject (meeting name), date, start time, and end time for your meeting.
3. Click **Recurrence** and select a recurrence pattern.

Note: You can edit this pattern at a later time: from your Outlook calendar, open the series and click **Recurrence**. Modify the recurrence pattern. When finished, click **Send Update** to send updated notifications to meeting invitees.



4. Select the **MeetingPlace** tab. A progress bar displays until the MeetingPlace tab opens.
5. From the MeetingPlace tab, select **Make this a MeetingPlace meeting** then fill in the meeting details, such as the meeting ID, whether you want the meeting to be recorded, the number of locations, and a MeetingPlace server for this meeting. Refer to page 81 for a detailed list of meeting detail fields.

Notes:

- If you decide later that you do not require MeetingPlace resources for a single instance of this recurring meeting chain, disassociate that particular meeting from the MeetingPlace resources. Refer to page 90 for instructions.
- Entire recurring meeting chains cannot be disassociated.

6. Click **Check Availability** to ensure that the requested time, duration, meeting ID, recording space, and number of locations are available on the MeetingPlace server.

Note: MeetingPlace for Outlook does not allow you to schedule a recurring meeting chain until all meetings in a recurring chain can be scheduled without conflict.

7. To set additional MeetingPlace settings, from the **MeetingPlace** tab, click **Advanced Settings**.
8. To invite attendees, go to the **Attendee Availability** tab, then enter attendees names in the **All Attendees** column.
9. When finished, click **Send**.

To Schedule a Continuous Meeting

Only those with System Manager privileges can schedule or delete continuous meetings.

To schedule a continuous meeting:

1. Open your Outlook calendar and double-click on a time. The scheduling form opens.
2. From the **Appointment** tab, enter the necessary meeting information, such as the subject (meeting name), date, start time, and end time for your meeting.
3. Select the **MeetingPlace** tab. A progress bar displays until the MeetingPlace tab opens.
4. From the MeetingPlace tab, select **Make this a MeetingPlace meeting** then fill in the meeting details, such as the meeting ID, whether you want the meeting to be recorded, the number of locations, and a MeetingPlace server for this meeting.
5. From the **Frequency** drop down box, select **Continuous**. Selecting this option sets your meeting start time to “now”, and your meeting end time in the future. The **Show Time As** property changes to **Free** to ensure that the meeting does not block time in users’ calendars.
6. Select the **Advanced Settings** tab for advanced options and the **Attendee Availability** tab to invite attendees. When finished, click **Send**.

WebConnect

Users of MeetingPlace for Outlook can now take advantage of WebConnect—a concept that makes use of a single database and a customer defined “rollover” sequence to provide seamless integration between multiple MeetingPlace sites. Refer to the table below for a list of WebConnect terms and definitions.

Term	Definition
Site	A collection of systems
System	Either a standalone MeetingPlace server or a networked group of up to eight MeetingPlace servers Note: Sites and systems are not geographically constrained
Rollover map	Define the sequence of sites MeetingPlace attempts to schedule on. Each user or group of users are assigned a rollover map, configurable on the WebConnect administration page of MeetingPlace Web Note: For further information, please refer to the <i>MeetingPlace Web System Manager's Guide</i> or your MeetingPlace support representative

WebConnect ensures the most efficient use of MeetingPlace resources while still offering the benefits of a consistent user experience as follows:

- MeetingPlace initially attempts to schedule on the first site indicated in your configured rollover map regardless of what location you are scheduling from
- If the meeting cannot be scheduled on this site, MeetingPlace automatically attempts to schedule on the next site as indicated in your rollover map
- MeetingPlace continues trying subsequent sites until the meeting can be scheduled
- A warning message prompting you to confirm rollover to another site is displayed if configured

To schedule on a site other than your default site: from the MeetingPlace tab, modify the **MeetingPlace Server** setting. If the meeting cannot be scheduled on the selected site, rollover will ensue beginning at the first site of your standard roll over map.

The screenshot shows the 'MeetingPlace' tab in an Outlook window titled 'Staff meeting - Meeting'. The window has a menu bar (File, Edit, View, Insert, Format, Tools, Actions, Help) and a toolbar with icons for Send, Print, Attach, Recurrence, and Cancel Invitation. Below the toolbar are tabs for 'Appointment', 'MeetingPlace', and 'Attendee Availability'. The main content area features the 'meetingplace' logo and 'MeetingPlace for Outlook' text with links for 'Upgrade', 'About', and 'Help'. There are two tabs: 'MEETING SETTINGS' and 'ADVANCED SETTINGS'. Under 'MEETING SETTINGS', there is a checked checkbox 'Make this a MeetingPlace meeting.'. Below this are fields for 'Date' (DEC 3, 2002), 'Time' (2:00 PM), 'Duration' (30 Minute(s)), 'Frequency' (Once), '# of Occurrences' (1), and 'Meeting Name' (Staff meeting). Under 'ADVANCED SETTINGS', there are fields for 'Meeting ID' (staff), 'Enable Recording' (No), '# of Callers' (4), 'Billing Code', and 'MeetingPlace Server' (GoldenGate). The 'MeetingPlace Server' dropdown is circled in red.

To limit scheduling to a particular site: select **Try only this site**. This effectively turns off the automatic rollover function. If you select this checkbox and scheduling fails, you will receive an error message.

Note: **Try only this site** is only visible if the selected server has been configured for WebConnect.

Recurring meetings will only roll if all meetings in a recurring chain fail to schedule on the initial site.

Notes:

- In order for you to roll over to other sites, you must have the following fields set in your profile:
 - Sched only on scheduling home server? = **No**
 - Sched only on NS home site? = **No**
- All sites configured for WebConnect must have the MeetingPlace for Outlook Client Service installed in order to participate.

Rescheduling Meetings

To reschedule a meeting:

1. From your Outlook calendar, double-click the entry for the meeting you want to reschedule. If you are rescheduling a single instance of a recurring meeting chain, select **Open this occurrence**.
2. From the **MeetingPlace** tab, select **Meeting settings** and modify your meeting details.
3. When finished, click **Send Update** to send updated notifications to meeting invitees.

Note: The reschedule option is not available for continuous meetings

Disassociating Meetings

MeetingPlace for Outlook enables you to disassociate MeetingPlace resources from your meeting after the meeting has already been scheduled.

To disassociate a meeting:

1. From your Outlook calendar, double-click the entry for the meeting you want to disassociate. If you are disassociating a single instance of a recurring meeting chain, select **Open this occurrence**.
2. From the **MeetingPlace** tab, select **Meeting Settings** and clear **Make this a MeetingPlace meeting**.
3. When finished, click **Send Update** to send updated notifications to meeting invitees.

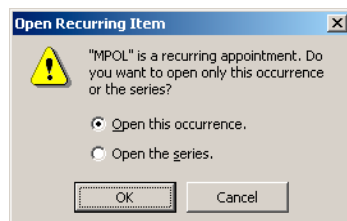
Attending Meetings

This section discusses two ways to attend meetings through MeetingPlace for Outlook:

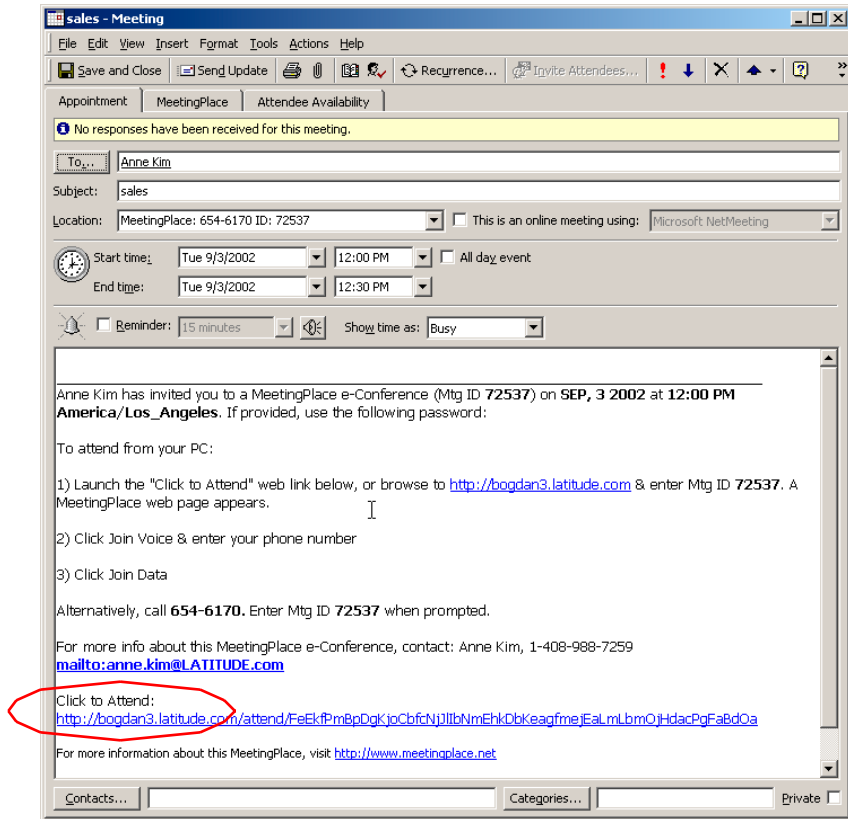
- Using the meeting invitation
- Using the MeetingPlace tab

Using the Meeting Invitation

Once you accept a meeting invitation, the notification appears in your Outlook calendar. To attend the meeting, double-click the entry from your calendar. If the invitation refers to a recurring meeting chain, select whether to see the meeting details for an individual instance or the entire recurring series.



Once the meeting invitation opens, join your meeting by clicking the **Click to Attend** link located at the end of your meeting invitation.

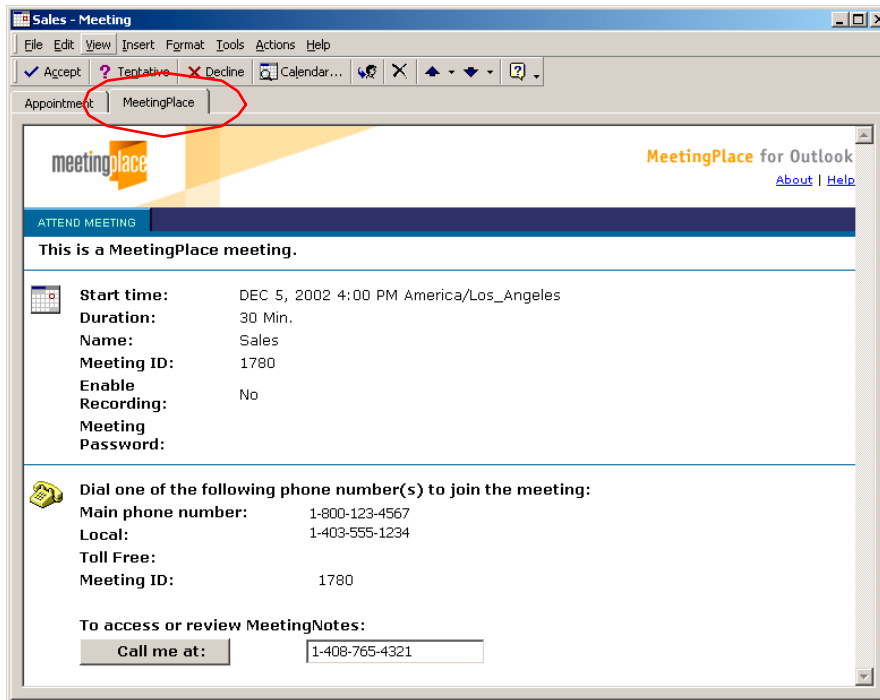


Your web browser opens and brings you to the MeetingPlace Web login page (if this is the first time you are accessing MeetingPlace Web), or directly into the meeting room (if you have logged into MeetingPlace Web before and selected the **Remember Me** checkbox).

To join the voice conference, click the telephone icon from the meeting room. Enter a phone number into the resulting dialog box (if not already populated) to have MeetingPlace outdial you.

Using the MeetingPlace Tab

All MeetingPlace meetings scheduled from a MeetingPlace interface (MeetingPlace for Outlook, MeetingPlace Web, MeetingTime etc.) send notifications with an attached MeetingPlace tab. To attend a meeting, open your calendar item and select the **MeetingPlace** tab to reveal the **Attend Meeting** page.



For **Call me at**, enter your phone number (if not already populated), then click the **Call me at** button. The MeetingPlace server dials the number provided and connects you to the voice conference.

If there is a web conference associated with this meeting, click the **Join Web Conference** button. The web browser opens to the MeetingPlace meeting room where you can view the web conference.

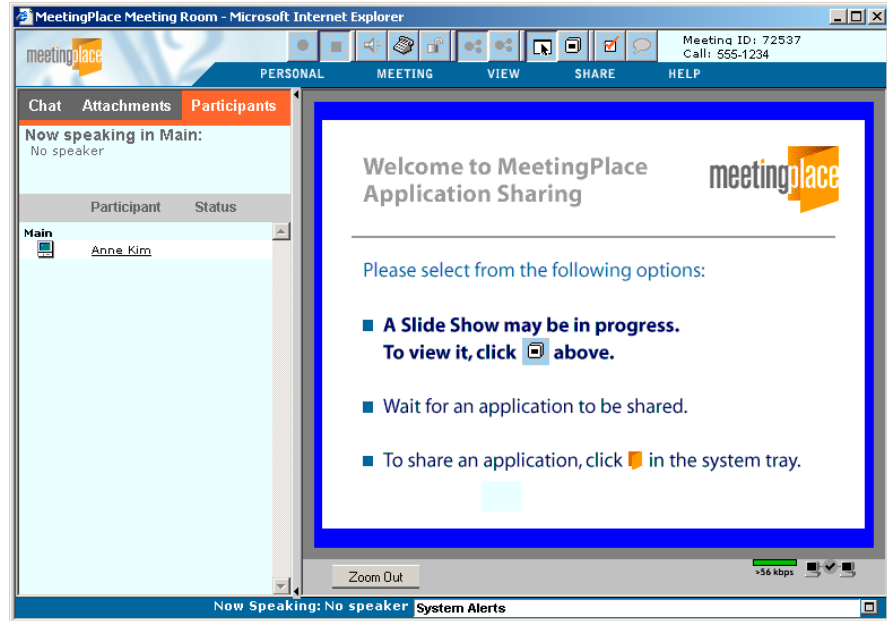


Figure 6-1 MeetingPlace Meeting Room

If you do not have MeetingPlace for Outlook installed, but receive your invitations in Microsoft Outlook, download the MeetingPlace for Outlook Client from the MeetingPlace tab. You must have System Manager privileges on this machine in order to download the MeetingPlace for Outlook Client. Otherwise, you will receive an error message.

Deleting a Meeting

To delete a meeting, highlight the meeting entry in your Outlook calendar and press the **Delete** key on your keyboard. MeetingPlace for Outlook asks if you want to send a cancellation notification to meeting invitees. Select a cancellation option and click **OK**.

Solving End User Issues

This section provides workaround solutions for:

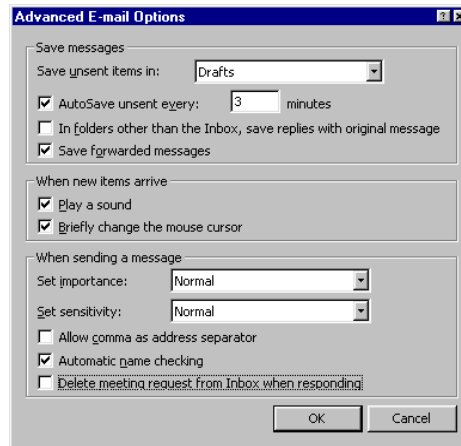
- Saving meeting invitations in the Inbox
- Changing the default scheduling form of the Outlook calendar
- Automatic upgrade detection and download
- Scheduling meetings when working offline in Outlook

Saving Meeting Invitations in the Inbox

By default, a meeting invitation is deleted from your e-mail Inbox once the meeting is accepted or declined. For most Outlook users, this does not create a problem because the meeting information that was in the invitation appears in your Outlook calendar once the meeting is accepted.

If you do not use the Outlook calendar, configure Outlook to save meeting invitations in your e-mail Inbox as follows:

1. From the Outlook **Tools** menu, select **Options**.
2. From the **Options** window, make sure you are in the **Preferences** tab and then click **E-mail Options**.
3. From the **E-mail Options** window, click **Advanced E-mail Options**.
4. At the bottom of the **Advanced E-mail Options** window, clear the **Delete Meeting Request from Inbox When Responding** box. Click **OK**.

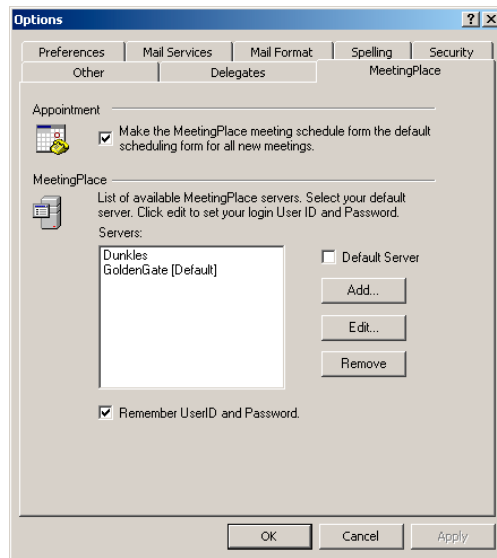


Changing the Default Scheduling Form of the Outlook Calendar

You determined the default scheduling form when you installed MeetingPlace for Outlook. If you selected the MeetingPlace scheduling form as your default, you should see a MeetingPlace tab appears in your scheduling form.

If you did not select the MeetingPlace scheduling form as your default, but want the MeetingPlace tab to appear in your scheduling form, change the property settings of their Outlook calendar as follows:

1. From the Outlook **Tools** menu, select **Options**.
2. From the **Options** window, select the **MeetingPlace** tab.
3. Select the **Appointment** box to make the MeetingPlace scheduling form the default.
4. Click **Apply** and then click **OK**.



Automatic Upgrade Detection and Download

MeetingPlace for Outlook automatically detects when a newer version of the MeetingPlace for Outlook Client is available on the MeetingPlace server. Depending on how you configured your upgrade alert in the Configuration Client Utility, MeetingPlace for Outlook will either alert you with an **Upgrade** link (default), prompt you to download the latest version, or not alert you at all. Refer to page 41 for instructions on how to configure your system for upgrade alerts.

To download the newer version:

1. Depending on your alert mechanism, either open the MeetingPlace scheduling form and click the **Upgrade** link in the top right corner of the form, or select **Yes** when prompted for an upgrade.

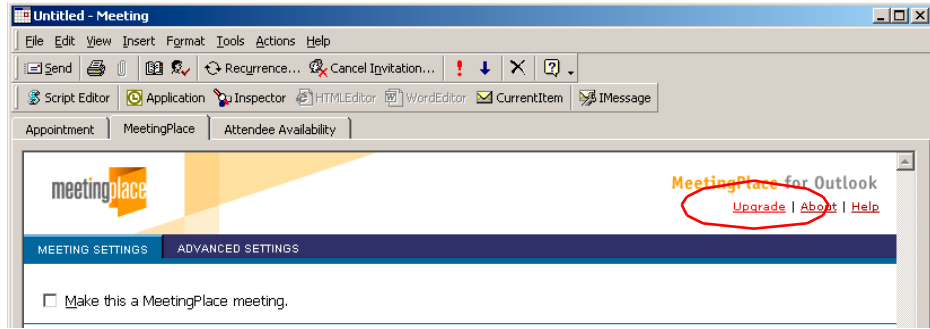


Figure 6-2 Upgrade Link on the Scheduling Form

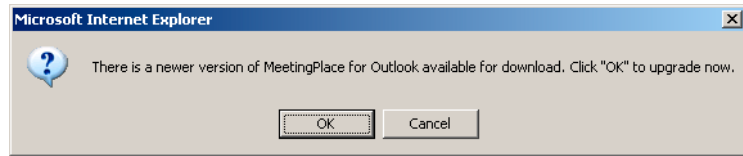
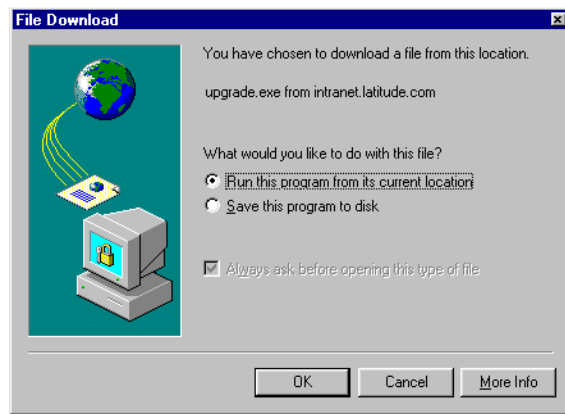


Figure 6-3 Upgrade Prompt

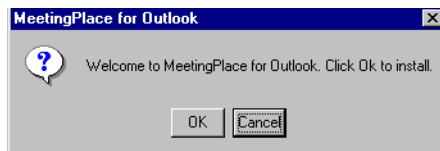
2. From the **File Download** window, select **Run this program from its current location** and click **OK**.



3. If a Security Warning window appears, click **Yes** to accept.



4. When the MeetingPlace for Outlook window appears, click **OK** to install.



5. Click **OK** once the MeetingPlace for Outlook setup has completed. Close all Microsoft Office applications, then restart Microsoft Outlook

Note: If you do not see the MeetingPlace tab after you restart Microsoft Outlook, close it again and look in the task manager to make sure the Outlook process ended.

Working Offline in Outlook

MeetingPlace enables you to schedule MeetingPlace meetings using the MeetingPlace scheduling form while working in offline mode. You must still be connected to their company network, but you do not need to be connected to your Exchange server.

Note: In order to schedule meetings while working offline, you must have IP connectivity to the MeetingPlace for Outlook gateway machine and have Microsoft Outlook enabled for offline access. Refer to Microsoft Outlook documentation for details.

When a meeting is scheduled using this method, the meeting invitation remains in the Outlook Outbox until you reconnect to your Exchange server. Once a connection is re-established, MeetingPlace meetings are then scheduled on the MeetingPlace server.

7

MeetingPlace Reservationless Feature

The MeetingPlace reservationless features enables you to initiate and attend reservationless meetings through MeetingPlace for Outlook. Topics in this chapter include:

- About the MeetingPlace Reservationless Feature
- Requirements
- Configuration
- Using the MeetingPlace Reservationless Feature

About the MeetingPlace Reservationless Feature

A reservationless meeting does not require you to schedule resources or set meeting IDs in advance. Your meeting ID is assumed to be equal to your MeetingPlace profile number and your reservationless meeting is always available.

As such, resources are not actively allocated when you “schedule” a reservationless meeting through MeetingPlace for Outlook. However, “scheduling” a reservationless meeting ensures that all invitees receive an Outlook calendar invitation with the start time, duration, phone number, Click to Attend link, and meeting ID (your profile number) for the conference, along with the MeetingPlace tab.

Users can select to attend your reservationless meeting at any time using the information in the notification. However, the meeting will not start until you, the meeting scheduler, selects to

join the meeting. Users who join your reservationless meeting before you are placed in a waiting room until you arrive.

Note: MeetingPlace does not enable attendees in the waiting room to speak with each other..

Your MeetingPlace server must be set to reservationless mode before reservationless meetings can be enabled on it. Once enabled, it applies to all user profiles; it cannot be made available on an individual profile or group basis.

For more information on configuring your MeetingPlace server to reservationless mode, refer to the *MeetingServer 5.0.2 Customer Engineer Guide*.

Requirements

Note: It is assumed that a customer with reservationless capability has the necessary port capacity to handle all users' requests for meetings.

The MeetingPlace reservationless feature on MeetingPlace for Outlook requires the following:

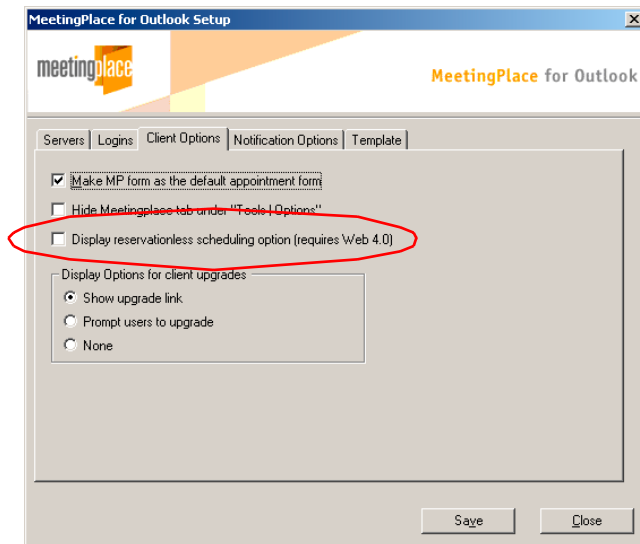
Topic	Requirement
MeetingPlace software	<ul style="list-style-type: none"> • MeetingServer 5.0.2 • MeetingPlace Web 4.0 (release 4.3)
Windows server	<ul style="list-style-type: none"> • Windows 2000 Server Edition (Service Pack 2 or higher) or Advanced Server Edition (Service Pack 2) • Microsoft IIS 5.0 • SQL Server 7 (Service Pack 4) or SQL Server 2000 (Service Pack 3) • Outlook 98 with Archive Patch or Outlook 2000 (Service Release 1 and Service Pack 3) with CDO installed

Topic	Requirement
Exchange Server	<ul style="list-style-type: none"> Exchange 5.5 (Service Pack 4) or 2000 (Service Pack 2)
End User System	<ul style="list-style-type: none"> Windows 98, NT (Service Pack 6A or higher), 2000, ME, or XP operating system Outlook 98 with Archive Patch, 2000, or XP

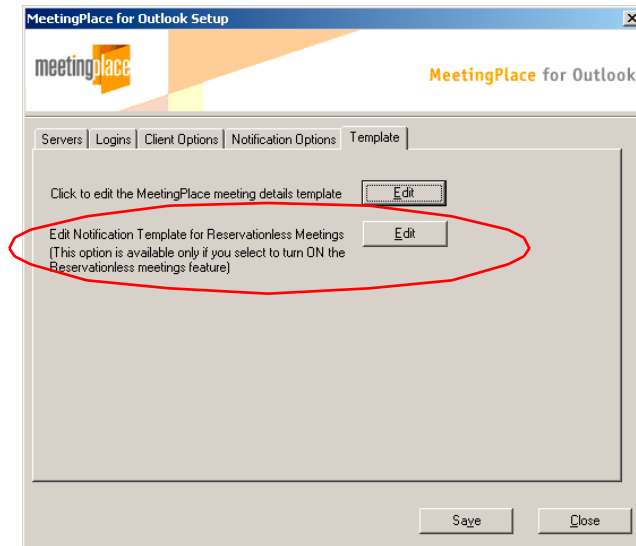
Configuration

To configure MeetingPlace for Outlook to enable the reservationless feature, access the Configure Client Setup Utility.

1. Go to the Control Panel (Start | Settings | Control Panel) and double-click the **MeetingPlace Gateways** icon. From there, select the **Outlook Gateway** tab.
2. From the **Outlook Gateway** tab, click **Configure Client Setup**. The Configure Client Setup Utility opens.
3. Select the **Client Options** tab and select **Display reservationless scheduling option**.



4. Select the **Template** tab and click **Edit** to edit the notification template for reservationless meetings.



5. For information on how to edit the notification template for reservationless meetings, refer to Chapter 5.

Using the MeetingPlace Reservationless Feature

To schedule a meeting using your reservationless ID:

1. Open your Outlook calendar and double-click on a time. The scheduling form opens.
2. From the **Appointment** tab, enter the necessary meeting information, such as the subject (meeting name), date, start time, and end time for your meeting.
3. When finished, select the **MeetingPlace** tab. A progress bar displays until the MeetingPlace tab opens.
4. From the **MeetingPlace** tab, select **Use my Reservationless ID**. This automatically sets the meeting as a MeetingPlace meeting and disables irrelevant fields and options.

The screenshot shows the 'MeetingPlace' window in Outlook. The 'MEETING SETTINGS' tab is active. Two checkboxes are checked and circled in red: 'Make this a MeetingPlace meeting.' and 'Use my Reservationless ID (125478)'. Below these are fields for Date (JAN 28, 2003), Time (2:30 PM), Duration (30 Minute(s)), Frequency (Once), # of Occurrences (1), and Meeting Name (Staff). At the bottom, there are fields for Meeting ID (125478), Enable Recording (No), # of Callers (2), Billing Code, MeetingPlace Server (Dunkles), and a 'Secure Area' icon.

5. Set the meeting details, such as the date, time, duration, frequency, and name of the meeting.
6. To invite attendees, go to the **Attendee Availability** tab, then enter attendees names in the **All Attendees** column.
7. When finished, click **Send**.

Notes:

- Changing a regularly scheduled MeetingPlace meeting to a reservationless meeting is not allowed.
- Changing a reservationless meeting to a regularly scheduled MeetingPlace meeting is not allowed.

Reservationless meeting can be rescheduled for both single occurrences and recurring meeting chains. To reschedule a reservationless meeting:

1. Open the meeting entry from your Outlook calendar and modify the meeting details (start time, date, etc.).
2. When finished, click **Send Update**. Notifications are updated with the new meeting details and sent to meeting invitees.

To delete a reservationless meeting, highlight the meeting entry in your Outlook calendar and press the **Delete** key on your keyboard. MeetingPlace for Outlook asks if you want to send a cancellation notification to meeting invitees. Select a cancellation option and click **OK**.

Attending a Reservationless Meeting

MeetingPlace for Outlook sends invited attendees a meeting notification that includes the MeetingPlace tab along with a Click to Attend link.

Note: MeetingPlace for Outlook does not send notifications for reservationless meetings scheduled from other MeetingPlace interfaces (e.g., MeetingPlace Web or MeetingTime).

To attend a meeting, scroll to the bottom of your notification and click the Click to Attend link. Since this is a reservationless meeting the link is always functional. However, you will be taken to a waiting room if the meeting is not in session.

8 Troubleshooting

This chapter explains how to troubleshoot common problems that may occur when using MeetingPlace for Outlook. Please review this section before contacting your MeetingPlace support representative.

It is divided into the following sections:

- Log Files
- Problems Installing MeetingPlace for Outlook
- Problems with the MeetingPlace tab
- Problems scheduling MeetingPlace for Outlook meetings
- Problems attending MeetingPlace for Outlook meetings
- Problems with MeetingPlace Gateway Configurations Utility
- Problems with MeetingPlace Directory Services

Log Files

MeetingPlace for Outlook will log to the MeetingPlace Gateway SIM eventlog. To access this log file:

1. Right-click on the Latitude icon in your system tray and select **Eventlog**. This invokes the GWSIM real-time log file.

OR

Navigate to <drive>\Latitude\MeetingPlace Gateway SIM and double-click the **MPLaunch** application. MPLaunch opens the icon in the system tray.

2. From this log you may observe the MeetingPlace for Outlook components performing their assigned tasks. For fault isolation purposes you may be required to forward this log file to Latitude Customer Support.

To generate a .txt file containing the log file:

1. Open a DOS command window and navigate to <drive>\Latitude\MeetingPlace Gateway SIM
2. From the <drive>\Latitude\MeetingPlace Gateway SIM prompt, type:

```
Eventlog >> Output.txt
```

The result is a text file called *Output.txt* in the <drive>\Latitude\MeetingPlace Gateway SIM directory.

3. Send this file via e-mail to Latitude Customer Support.

Problems Installing MeetingPlace for Outlook

MeetingPlace for Outlook specifications dictate that the gateway must log into the Exchange server on the domain and be granted privilege to do so. Testing on Windows 2000 Advanced Server has shown that the “MeetingPlace for Outlook Version 4” service will not log into the Exchange server unless the gateway’s account (specified during installation) is placed in the local administrator’s group. Failing to do so will result in one of the following error messages:

- Could not start the MeetingPlace for Outlook Version 4 service on local computer. The service did not return an error. This could be an internal Windows error or an internal service error. If the problem persists, contact your system administrator
- MAPI_E_NOT_FOUND
- There are currently no logon servers available to service the logon request

Currently there is no workaround for this issue. However,

- The MeetingPlace for Outlook application can be unregistered from the service control manager by using the **regserver** or **regsvr32** switch from the **Run** menu (consult your Windows 2000 **Help** menu for more information regarding how to register and un-register services).
- After un-registering the application as a service, the MeetingPlace for Outlook application can be run manually by double clicking on the icon in the folder in which it was installed, usually: <drive>:\Latitude\MPOutlook.

Problems with the MeetingPlace Tab

Q: Why is there no MeetingPlace tab when I open my Outlook client?

A: This may be due to several different reasons:

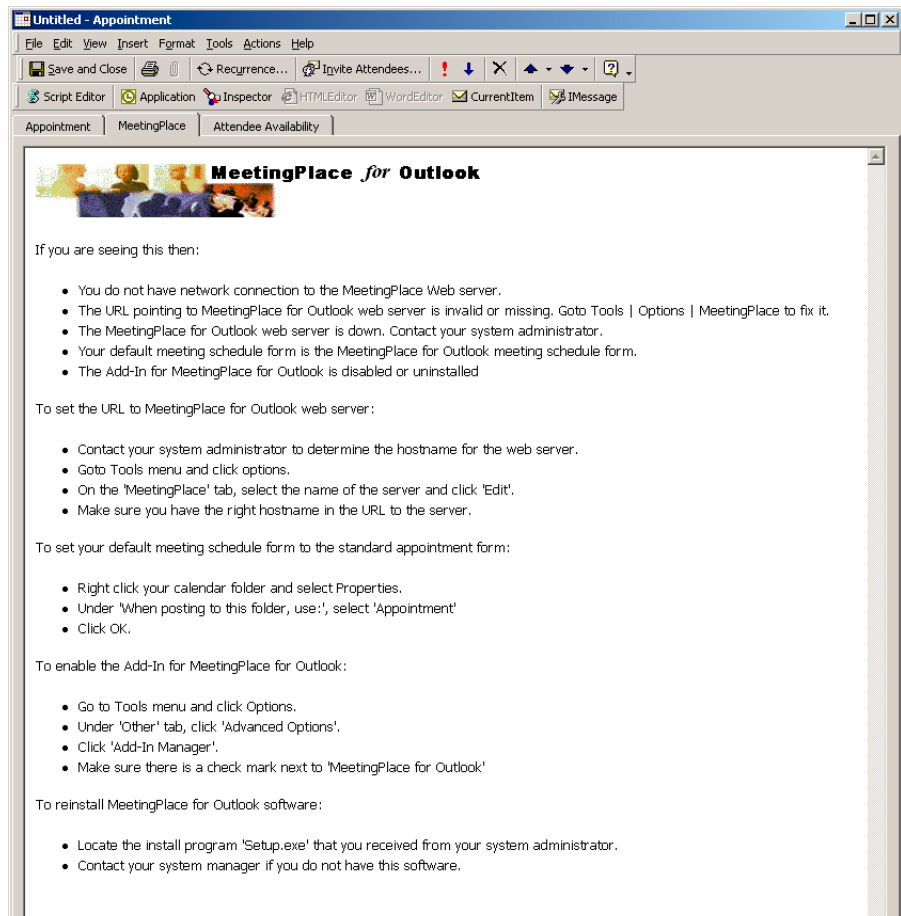
1. This problem may be due to an improper shutdown or having multiple Outlook clients open. Close all Outlook clients and check the Task Manager to make sure that Outlook has shut down, then re-open your Outlook client. From the **File** menu, select **New | Appointment**. Is there a MeetingPlace tab? If not, proceed to step 2.
2. From the Outlook **Tools** menu, select **Options**, then the **MeetingPlace** tab. From the Appointment section, verify that **Make the MeetingPlace meeting schedule form the default** is selected. If this MeetingPlace tab is not available, proceed to step 3.
3. Check your operating system. If you are on Windows XP, you may have disabled items. From the **Help** menu, select **About Microsoft Outlook**, then **Disabled Items**. If *mp4ol737.dll* is disabled, select it and click **Enable**. Then restart Outlook XP.

- It is possible that MeetingPlace is not set as your default form. From the Configuration Client Utility, select the **Client Options** tab. Select **Make MP form as the default appointment form**. Click **Save** then **Close**.

Q: Why do I have a blank MeetingPlace tab?

A: It is possible that the MeetingPlace for Outlook gateway machine is down.

If you receive the following error, follow the instructions provided in the error message:



Q: Why is the MeetingPlace tab not available from meetings scheduled by MeetingPlace Web or MeetingTime?

A: This may be due to an administrator setting. From the Configuration Client Utility's **Client Options** tab, verify that **Hide MeetingPlace tab under Hide | Options** is selected. If you want the MeetingPlace tab to be available, clear this option.

Q: After upgrading MeetingPlace for Outlook to release 4.2.7, I have to log in everytime I click the MeetingPlace tab. Why is this?

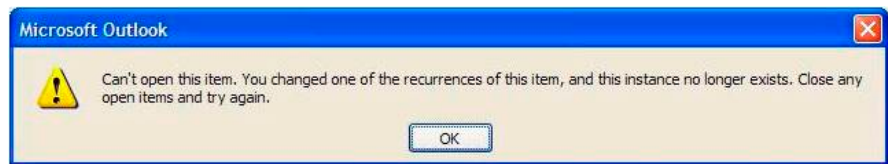
A: This may be due to several different reasons:

1. It is possible that you did not upgrade your MeetingPlace for Outlook client. To verify your version of the MeetingPlace for Outlook client: from the Outlook **File** menu, select **New | Appointment**. From the MeetingPlace tab, click **About**. If necessary, upgrade to the version 4.2.7 client.
2. This may be due to an administrator setting. From the Configuration Client Utility's **Logins** tab, verify that **Do not persist login information** is cleared. If you do not want to log in each time you access the MeetingPlace tab, select a different login option.
3. It is possible that this setting is not set in Outlook. From the Outlook **Tools** menu, select **Options**. From the MeetingPlace tab, select **Remember UserID and password**.
4. If you are logging in with MeetingPlace Directory Services or Integrated Windows Authentication, it is possible that these are not set properly. Refer to page 40 for more information on these options.

Problems Scheduling Meetings

Q: I tried to reschedule the first occurrence of a recurring meeting chain that is currently in progress. The following error message displayed: "Operation is not allowed. Meeting in progress."

When I try to open this occurrence, I receive the following message. What should I do?



A: Wait a few seconds and then try to open the item again.

Q: What should I do when I receive this error message: “Microsoft Outlook is not your default e-mail client”

A: It is possible that you did not specify your e-mail client. Prior to installing MeetingPlace for Outlook, open your Internet Explorer. From the **Tools** menu, select **Internet Options**, then **Programs**. For **E-mail**, select **Microsoft Outlook**. Click **OK**.

Problems Attending Meetings

Q: When I click **Call Me at** to attend a meeting, why is my phone number information not pre-populated?

A: This may be due to several different reasons:

1. Verify that you are using the MeetingPlace for Outlook 4.2.7 client. MeetingPlace for Outlook 4.2.5 does not support this feature. If you are still using version 4.2.5, upgrade your MeetingPlace for Outlook client.
2. The outdial feature from MeetingPlace Web may be disabled.
3. When upgrading to MeetingPlace for Outlook 4.2.7, you may have changed the MeetingPlace server name. From the Outlook **Tools** menu, select **Options**, then the **MeetingPlace** tab. Verify that your default MeetingPlace server name has not changed from version 4.2.5.

4. The telephone number information may not be in your MeetingPlace user profile. To verify, open MeetingTime and click the Register Book. From the **Configure** tab, select the **User Profiles** topic. Click **Query** then scroll down to the **Phone number** attribute.

Q: My Click to Attend link is truncated and doesn't work. What should I do?

A: This may be due to several reasons:

1. Check your Exchange server settings. It may be set to wrap. For more information, refer to the following Microsoft Knowledge Base articles:
 - <http://support.microsoft.com/support/kb/articles/Q250/5/58.asp>
 - <http://support.microsoft.com/support/kb/articles/Q281/8/35.asp>
2. Check your e-mail client. It may also be set to wrap.
3. In such circumstances, cut the entire Click to Attend link and paste it into your browser address field.

Problems with Gateway Configurations Utility

Q: My Gateway Configurations Utility doesn't display an Agent Service tab. How do I access it?

A: Check your version of the MeetingPlace Gateway Configurations Utility. This utility does not display the Agent Service tab after version 4.2.1.7.

To access the Agent Service, go to Start | Programs | MeetingPlace Applications | MeetingPlace Web Administrator. Select the **Configure** tab, then the **Agent Service**.

Problems with MeetingPlace Directory Services

Q: I created a meeting for “Invited Profiled Users” and also invited a Distribution List. While members of the distribution list received an invitation, they weren’t able to join the meeting. Why is this?

A: MeetingPlace for Outlook does not expand distribution lists. Therefore, if a distribution list is invited, the individual users on the distribution list are not added to the meeting.

There are two workarounds for this issue:

- Expand the distribution list before sending the invitation. This ensures that each individual in the distribution list will receive an invitation.
- Rather than inviting a distribution list, invite individual users.

A List of Items You Can Include in Notifications

This appendix lists tags that can be included in the meeting notifications. For information on how to use these tags, refer to Chapter 5

Table A-1 List of Tags You Can Use in Notification Templates

Suggested Label	Tag	Description
This tag is not intended to have a label.	<!--#LATD AttendMeetingHint -->	Inserts any text found in the How to Attend Meeting parameter (located under the Company Information topic in the Configure tab)
Scheduler:	<!--#LATD SchedulerFirstName --> <!--#LATD SchedulerLastName -->	Inserts the scheduler's first and last name
Scheduler Phone:	<!--#LATD SchedulerTelephoneNum -->	Inserts the scheduler's phone number
Scheduler Fax:	<!--#LATD SchedulerFaxNum -->	Inserts the scheduler's fax number
Scheduler E-mail:	<!--#LATD SchedulerEmail -->	Inserts the scheduler's e-mail address

Suggested Label	Tag	Description
This tag is not intended to have a label.	<pre><!--#LATD MultiServerHelp Text <i>This meeting will be held on the following MeetingPlace systems. Dial the phone number of the system closest to your location. -- ></i></pre>	<p>Inserts any text entered after MultiServerHelpText. The suggested text for this tag is displayed in italics.</p> <p>This tag only appears in notifications for multiserver meetings. Use this tag in conjunction with the ListMultiServers tag (listed next).</p>
This tag is not intended to have a label.	<pre><!--#LATD ListMultiServers --></pre>	<p>Inserts the name and phone number of the other MeetingPlace servers that are involved in the multiserver meeting. This tag should always follow the MultiServerHelpText tag.</p>
MeetingPlace Phone Number:	<pre><!--#LATD Mtg_Telephone Num --></pre>	<p>Inserts the main MeetingPlace phone number</p>
This tag is not intended to have a label.	<pre><!--#LATD C_AltPhoneNumName1 --> <!--#LATD C_AlternatePhoneNum1 --></pre>	<p>Inserts the first alternate MeetingPlace phone number and label</p>
This tag is not intended to have a label.	<pre><!--#LATD C_AltPhoneNumName2 --> <!--#LATD C_AlternatePhoneNum2 --></pre>	<p>Inserts the second alternate MeetingPlace phone number and label</p>

Suggested Label	Tag	Description
This tag is not intended to have a label.	<pre><!--#LATD C_AltPhoneNumName3 --> <!--#LATD C_AlternatePhoneNum3 --></pre>	Inserts the third alternate MeetingPlace phone number and label
Meeting ID:	<pre><!--#LATD MTGID --></pre>	Inserts the meeting ID
Meeting Date: ^a	<pre><!--#LATD Month --> <!--#LATD Day -->, <!--#LATD Year --></pre>	Inserts the date of the meeting
Start Time (hh:mm) ^a	<pre><!--#LATDHour -->: <!--#LATD Min --> <!--#LATD AMPM --> <!--#LATD TimeZone --></pre>	Inserts the start time of the meeting
Frequency:	<pre><!--#LATD ReOccuringConference --></pre>	Inserts the frequency (weekly, monthly, etc) and number of occurrences of the meeting
Meeting Name:	<pre><!--#LATD TextName --></pre>	Inserts the meeting name
Meeting Length (min):	<pre><!--#LATD Len --></pre>	Inserts the length of the meeting
This tag is not intended to have a label. ^b	<pre><!--#LATD AttendConference --></pre>	Inserts a URL at the end of the notification that meeting attendees can click on to join their meeting (requires MeetingPlace Web)

Suggested Label	Tag	Description
Meeting Password:	<!--#LATD C_Password -->	Inserts the meeting password, if one has been assigned
Meeting Description:	<!--#LATD AttList_Meeting Desc -->	Inserts whatever text the meeting scheduler entered in the Meeting Description box
Meeting Participants:	<!--#LATD ListInvitees -->	Inserts a list of the attendees invited to the meeting
Who can attend meeting:	<!--#LATD EntryRestriction -->	Inserts who can attend the meeting (anyone, MeetingPlace users, or invited users)
Meeting Attachments:	<!--#LATD AttList_All -->	Inserts any meeting attachments into the notification. These attachments will always appear at the end of the notification, no matter where you place the tag.
Screened Introduction:	<!--#LATD fScreenedIntroduction -->	Inserts whether attendees joining a meeting will be screened for entry by those already in the meeting
Default Ability:	<!--#LATD DefaultAbility -->	Inserts whether the meeting is an all-speaker meeting or a lecture-style meeting
MeetingNotes:	<!--#LATD MeetingNotesHint -->	Inserts any text found in the How to Access MeetingNotes parameter (located under the Company Information topic in the Configure tab).
Record Conference:	<!--#LATD fRecordConference -->	Inserts information on whether or not the meeting is scheduled to be recorded
Who can access the recording:	<!--#LATD WhoCanListen ->	Inserts who can access the meeting recording (none, anyone, MeetingPlace users, or invited users)
This tag is not intended to have a label.	<!--#LATD ReschedReason ->	Inserts text that describes what has changed about a previously scheduled meeting, such as a new date, time, or attachment

Suggested Label	Tag	Description
Previous meeting month: ^b	<!--#LATD MonthPrev -->	Inserts the month of the previous meeting
Previous meeting day: ^b	<!--#LATD DayPrev -->	Inserts the day of the previous meeting
Previous meeting year: ^b	<!--#LATD YearPrev -->	Inserts the year of the previous meeting
Previous meeting hour: ^b	<!--#LATD HourPrev -->	Inserts the hour of the previous meeting
Previous meeting minute: ^b	<!--#LATD MinPrev -->	Inserts the minute of the previous meeting
Previous meeting time of day: ^b	<!--#LATD AMPMPrev -->	Inserts the time of day of the previous meeting
Recurring meeting change: ^b	<!--#LATD AllOrOne -->	Inserts information to tell you whether one or all forward meetings in a recurring chain have been changed or cancelled

^a Do not include this tag in the *mpMsgRsvl.rtf* template file.

^b Do not include this tag in the *MPmessage.rtf* template file.

B Customizing the MeetingPlace for Outlook Scheduling Form

The MeetingPlace for Outlook scheduling form (*mpolschedule.htm*) enables you to customize the information that populates the MeetingPlace tab. It can be found in <drive>:\Latitude\mpweb\template.

Customizing the *mpolschedule.htm* form requires the use of:

- HTML and Java Script
- Special instructions for MeetingPlace for Outlook
- MeetingPlace Software Developer's Kit (SDK) for extensive customizations only

It is assumed that you are familiar with these requirements before attempting to customize the *mpolschedule.htm* form.

Note: This chapter is provided for informational purposes only. Latitude Communications does not support customizations performed by non-Latitude Communications personnel. Please consult with your MeetingPlace support representative for information regarding Latitude Customization Services. Latitude Customization Services is not part of Full Care Support and is billed on a time and materials basis.

HTML

The *mpolschedule.htm* template form contains scheduling fields in the form of HTML tags, with all but the most popular commented out. It does not contain all the scheduling fields available to MeetingPlace for Outlook since even commented fields must be downloaded to the MeetingPlace tab each time this tab is selected by users. The *mpolschedule.htm* form therefore strikes a balance between extensive customizability and usability.

To customize this form, uncomment or comment the various HTML tags as desired.

Note: Before customizing this or any template file, it is recommended that you save a copy to the <drive>:\Latitude\MPWeb\mpoutlook directory.

The figure below is an example of the code found in the *mpolschedule.htm* file. Refer to Table B-1 for a full list of tags and descriptions.

```
<!-- This comments the Meeting Category field
<tr>
  <td width="20%" class=clsMtgHeader>Meeting Category:</td>
  <td width="80%"><!--#Nirwana MeetingCategory form -->
  <!-- <script language='javascript'>
    // allow the mtg to be changed for 'MeetingCategory' form
    if (document.theForm.MeetingCategory != null)
    {
      document.theForm.MeetingCategory.onchange = function(event)
      {onMtgChanged();}
    }
  </script>
  </td>
</tr>
```

The comment stops here -->

- Each field is contained in a table row
- Each table row starts with a tag <tr>
- Each table row ends with a tag </tr>

- The red line includes the tag that generates the form field
- The green line sets a flag to mark that a meeting parameter has been changed so that this information is transmitted to MeetingPlace
- To comment out a table row, place a start comment tag `<!--` before the `<tr>` tag
- End the comment after the end of the table row `</tr>` with the end comment tag `-->`
- To insert a table row, delete the start comment tag `<!--` that appears before the appropriate `<tr>` tag and the end comment tag `-->` that appears after the appropriate `</tr>` tag

If changes do not appear after modifying this file, try restarting the MeetingPlace Agent Service by navigating to Start | Settings | Control Panel | Services. Right-click on the **MeetingPlace Agent Service** and select **restart**.

Special Requirements

Please keep the following requirements in mind when customizing the *mpolschedule.htm* form. You may require the MeetingPlace SDK to enable proper functionality with MeetingPlace for Outlook.

1. Make sure that you set the **onChange** event for each field and tie it to the **onMtgChanged** JavaScript function.
2. Note that the fields are in table rows. Comment out the entire table row `<tr>`.
3. It is recommended that you add most of your fields in the **Advanced Settings** tab. This is another table on the same HTML page.

For more advanced customizations, contact MeetingPlace Customization Services.

List of Available Tags

The MeetingPlace for Outlook scheduling form (*mpolschedule.htm*) can be customized to include any number of the following tags. Tags are both input and output unless otherwise specified. Output tags can be followed by the display methods of TEXT, FORM, or LIST as follows:

- TEXT returns the value of the data.
- FORM returns the data in a form or table element. If the field is not modifiable, it is returned in read-only format.
- LIST returns an unnumbered list.

Not all display methods can be used by all tags.

Table B-1 List of Items You Can Use in the MeetingPlace for Outlook Scheduling Form

Tag	Description	Values	Description
Year	Year for which the meeting is scheduled	four digit year	FORM
Month	Month for which the meeting is scheduled	1-12	FORM
Day	Day for which the meeting is scheduled	1-31	FORM
Hour	Hour for which the meeting is scheduled	1-12	FORM
Min	Minute for which the meeting is scheduled	00-59	FORM
AMPM	Time of day for which the meeting is scheduled	AM or PM	FORM
Len	Scheduled length of the meeting	2-1440 minutes	FORM

Tag	Description	Values	Description
nLoc	Number of attendee ports reserved for the meeting	2-120	FORM
MTGID	The meeting's vanity ID	up to 17 digits	FORM
fPasswordRequired	Whether a meeting is password protected	Yes/No	FORM
C_Password	The meeting password	ASCII text up to 17 characters	FORM
NamedIntroduction	Whether a meeting has arrival announcements turned on	Beep Only, Beep with Name, Silent	FORM
NamedDisconnect	Whether a meeting has departure announcements turned on	Beep Only, Beep with Name, Silent	FORM
fScreenedIntroduction	Whether the meeting has screened introductions turned on	Yes/No	FORM
fRecordConference	Whether the meeting will be recorded	Yes/No	FORM
DefaultAbility	Guest user ability	Listener/ Speaker	FORM
TextName	The meeting's text name	ASCII text up to 17 characters	FORM
WhoCanListen	Who can listen to the meeting recording in MeetingNotes	None, Anyone, MeetingPlace Profile Users, Invited MeetingPlace Profile Users	FORM
MaxAttachments	The maximum number of attachments	0-30	FORM

Tag	Description	Values	Description
QuickMtgEntry	Whether quick meeting entry is allowed	Yes/No	FORM
AutoStartRecord	Whether recording starts automatically	Yes/No	FORM
PasswordRequiredOnOD	Whether a password is required to outdial	Yes/No	FORM
fDisableRollCall	Whether rollcall is disabled	Yes/No	FORM
EntryRestriction	Who can attend the meeting	None, Anyone, User, Invited User	FORM
SendNotAboutMeetings	Whether to send notification about the meeting	Yes/No	FORM
AutoDistributeAttachments	Whether to distribute attachments with the meeting notification	Yes/No	FORM
DefNotPriority	Default notification priority	Low, Medium, High	FORM
SendAboutMtgChanges	Whether to resend notification if the meeting is changed (rescheduled)	Yes/No	FORM
SendInviteListWithNot	Whether to send the list of invitees with the notification	Yes/No	FORM
SendMtgPwdWithNot	Whether to send the meeting password with the notification	Yes/No	FORM
fRecordpartnames	Whether to record attendee names as they join meeting	Yes/No	FORM
Billcode	The billing code for the meeting	up to 17 digits	FORM

Tag	Description	Values	Description
MTG_Telephone Num	The MeetingPlace server's telephone number	The server's configured telephone number	FORM (output only)
C_fAllowGuestView	Whether to display the meeting to everyone	Yes/No	FORM
C_SchedEmailAdd	The meeting scheduler's e-mail address	e-mail address as entered in the profile information	FORM
C_AlternatePhone Num1	First alternate phone number for the meeting	phone number	FORM
C_AlternatePhone Num2	Second alternate phone number for the meeting	phone number	FORM
C_AlternatePhone Num3	Third alternate phone number for the meeting	phone number	FORM
C_AltPhoneNum Name1	Name of the first alternate phone number	alpha-numeric text	FORM
C_AltPhoneNum Name2	Name of the second alternate phone number	alpha-numeric text	FORM
C_AltPhoneNum Name3	Name of the third alternate phone number	alpha-numeric text	FORM
C_FlexField	Flex field data for the meeting	alpha-numeric text	FORM

C Configuration Options

This chapter discusses your MeetingPlace for Outlook and MeetingPlace Web configuration options.

Topics covered in this chapter include:

- Segmented Meeting Access Configurations
- Non-Segmented Meeting Access Configurations
- Disabling MeetingPlace Web Services
- Renaming Files

Segmented Meeting Access Configurations

There are a variety of architectures that can be used in deploying MeetingPlace for Internet access. For the highest degree of security, Latitude recommends deploying MeetingPlace Web on two separate Windows servers: one configured as a full-access internal server, and the other configured as an attend-only access external server placed in the Demilitarized Zone (DMZ)—a network segment between a LAN/WAN and the Internet.

All MeetingPlace Web servers in the DMZ are then installed with the MeetingPlace for Outlook Client Services component with the scheduling form renamed. Renaming the scheduling form disables external users from accessing your MeetingPlace for Outlook system for the purpose of scheduling meetings.

This configuration provides a very high level of security in that it allows you to entirely isolate internal web conferencing activity and content to the internal network—only MeetingPlace meetings and associated web conferences specifically configured for external access will be available via the Internet.

While internal users have access to the full MeetingPlace Web interface, external users have limited attend-only access through a MeetingPlace Web home page that only allows attendance to meetings specified as public.

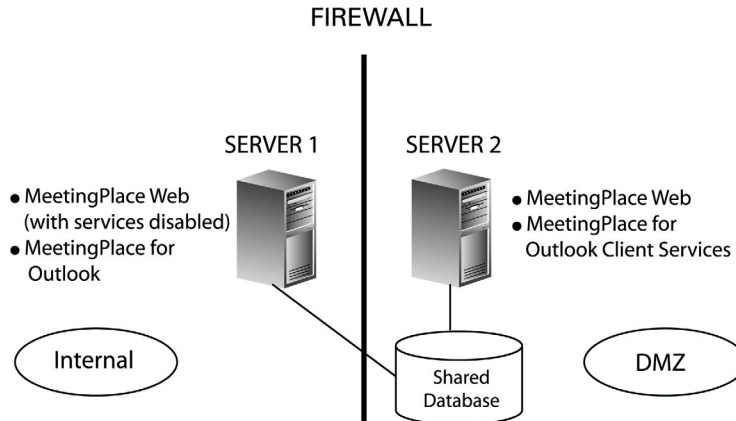
MeetingPlace for Outlook is supported in the following five segmented meeting access configurations:

- *Configuration 1.* MeetingPlace for Outlook on one Windows server, MeetingPlace Web on a separate Windows server in the DMZ.
- *Configuration 2.* MeetingPlace for Outlook and MeetingPlace Web (internal web) on one Windows server, MeetingPlace Web (external web) on a separate Windows server in the DMZ.
- *Configuration 3.* MeetingPlace for Outlook on one Windows server, MeetingPlace Web on a separate Windows server, MeetingPlace Web (external web) on a third Windows server in the DMZ.
- *Configuration 4.* MeetingPlace for Outlook on one Windows server, MeetingPlace Web (both internal and external) on a separate Windows server with external web within the DMZ.
- *Configuration 5.* WebConnect.

Note: It is highly recommended that multiserver configurations use a shared database when MeetingPlace for Outlook is on a separate machine. All web servers sharing a database **must** have the same version and build number of MeetingPlace Web installed.

Configuration 1

This configuration requires two Windows 2000 servers with a shared database as follows:



- *Server 1: MeetingPlace for Outlook Server.* This server is installed with MeetingPlace Web (4.2.7.106 or higher) with MeetingPlace Web services disabled, and MeetingPlace for Outlook.

Note: When installing MeetingPlace Web on Server 1, you must indicate that the database used is that of Server 2 (your MeetingPlace Web server). Also ensure that port 1433 is open from the internal segment to the DMZ.

- *Server 2: MeetingPlace Web Server (external).* This server is installed with MeetingPlace Web (4.2.7.106 or higher) and acts as your external MeetingPlace Web server. Server 2 is also installed with MeetingPlace for Outlook Client Services with scheduling disabled. This system is outside your firewall, in your DMZ.

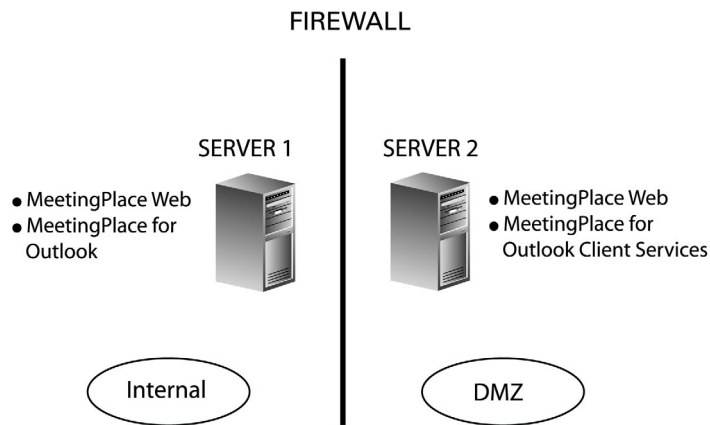
Configuration Steps

MeetingPlace Web must be installed prior to installing any MeetingPlace for Outlook components. After installation, complete the following configuration steps:

1. Disable MeetingPlace Web services on Server 1 as outlined in the “Disabling MeetingPlace Web Services” section on page 139.
2. Rename the *mpolschedule.htm* file on Server 2 to *mpolschedule.bak*. This ensures that guest users are not able to schedule meetings on your MeetingPlace system. The *mpolschedule.htm* file can be found in `<drive>:\Latitude\mpweb\template`.

Configuration 2

This configuration requires two Windows 2000 servers as follows:



Server 1: MeetingPlace for Outlook Server. This system is installed with MeetingPlace Web (4.2.7.106 or higher) and MeetingPlace for Outlook. This system acts as both your MeetingPlace for Outlook server and internal MeetingPlace Web server.

Server 2: MeetingPlace Web Server (external). This system is installed with MeetingPlace Web (4.2.7.106 or higher) and acts as your external MeetingPlace Web server. Server 2 is also installed with MeetingPlace for Outlook Client Services with scheduling disabled. This system is outside your firewall, in your DMZ.

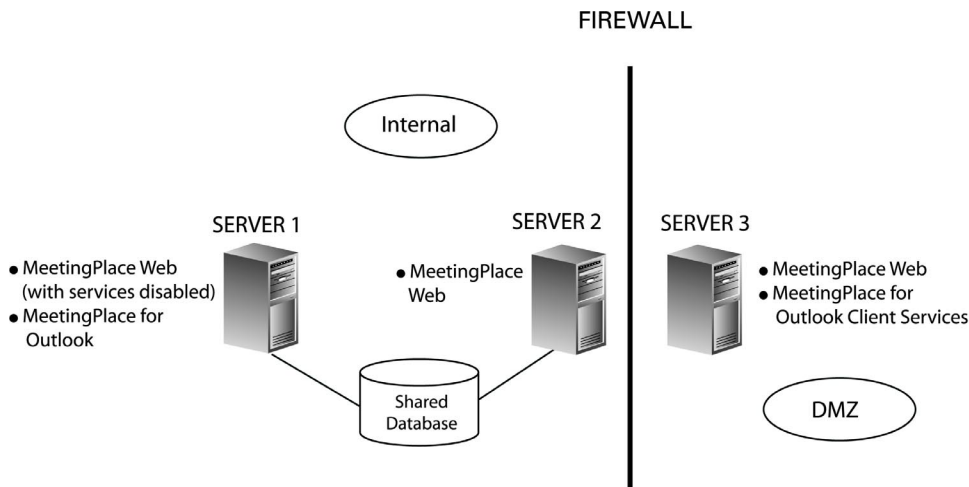
Configuration Steps

MeetingPlace Web must be installed prior to installing any MeetingPlace for Outlook components. After installation, complete the following configuration steps:

1. Rename the *mpolschedule.htm* file on Server 2 to *mpolschedule.bak*. This ensures that guest users are not able to schedule meetings on your MeetingPlace system. The *mpolschedule.htm* file can be found in <drive>:\Latitude\mpweb\template.

Configuration 3

This configuration requires three Windows 2000 servers as follows:



Server 1: MeetingPlace for Outlook Server. This system is installed with MeetingPlace Web (4.2.7.106 or higher) with MeetingPlace Web services disabled and MeetingPlace for Outlook.

Note: When installing MeetingPlace Web on Server 1, you must indicate that the database used is that of Server 2 (your MeetingPlace Web server).

Server 2: MeetingPlace Web Server (internal). This system is installed with MeetingPlace Web (4.2.7.106 or higher) and acts as your internal MeetingPlace Web server. Server 2 is inside the firewall.

Server 3: MeetingPlace Web Server (external). This system is installed with MeetingPlace Web (4.2.7.106 or higher) and acts as your external MeetingPlace Web server. Server 3 is also installed with MeetingPlace for Outlook Client Services with the scheduling form disabled. This system is outside your firewall, in your DMZ.

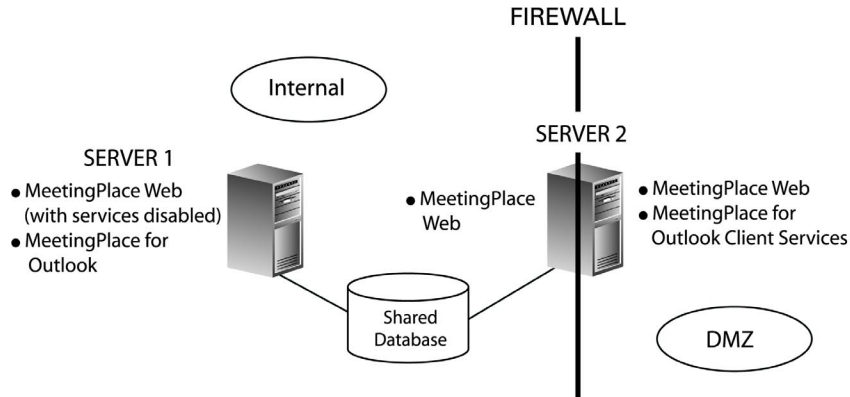
Configuration Steps

MeetingPlace Web must be installed prior to installing any MeetingPlace for Outlook components. After installation, complete the following configuration steps:

1. Disable MeetingPlace Web services on Server 1 as outlined in the “Disabling MeetingPlace Web Services” section on page 139.
2. Rename the *mpolschedule.htm* file on Server 3 to *mpolschedule.bak*. This ensures that guest users will not be able to schedule meetings on your MeetingPlace system. The *mpolschedule.htm* file can be found in <drive>:\Latitude\mpweb\template.

Configuration 4

This configuration requires two Windows 2000 servers sharing a database:



Server 1: MeetingPlace for Outlook Server. This system is installed with MeetingPlace Web (4.2.7.106 or higher) with MeetingPlace Web services disabled and MeetingPlace for Outlook.

Server 2: MeetingPlace Web Server. This system is installed with MeetingPlace Web (4.2.7.106 or higher) and acts as both your internal and external MeetingPlace Web server. Server 2 is also installed with MeetingPlace for Outlook Client Services with scheduling disabled.

Note: When installing MeetingPlace Web on Server 1, you must indicate that the database used is that of Server 2 (your MeetingPlace Web server).

Configuration Steps

MeetingPlace Web must be installed prior to installing any MeetingPlace for Outlook components. After installation, complete the following configuration steps:

1. Disable MeetingPlace Web services on Server 1 as outlined in the “Disabling MeetingPlace Web Services” section on page 139.

2. Rename the *mpolschedule.htm* file on Server 2 to *mpolschedule.bak*. This ensures that guest users are not able to schedule meetings on your MeetingPlace system. The *mpolschedule.htm* file can be found in `<drive>:\Latitude\mpweb\template`.

Configuration 5

This configuration requires a MeetingPlace for Outlook server and any number of MeetingPlace Web servers that have been configured for WebConnect.

For instructions on how to configure your MeetingPlace Web servers for WebConnect, please refer to Chapter 10 of the *MeetingPlace Web 3.0 System Manager's Guide*.

Configuration Steps

1. Install MeetingPlace for Outlook Client Services files on each MeetingPlace Web server that will be part of your rollover map.

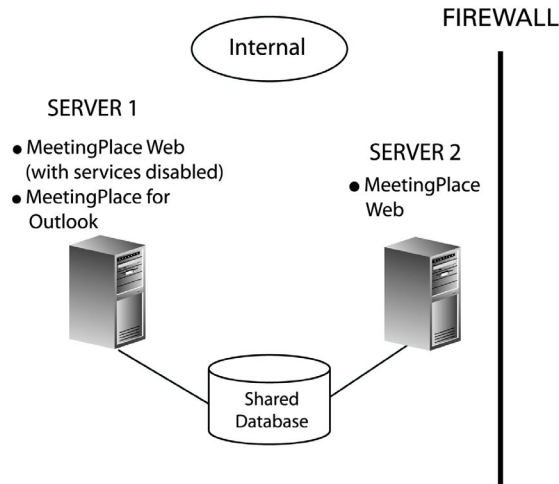
Non-Segmented Meeting Access Configurations

The standard configuration assumed in this guide is MeetingPlace Web and MeetingPlace for Outlook installed on the same Windows server. For information on this configuration, please refer to Chapter 3. This section describes the following alternate non-Segmented Meeting Access configuration options:

- *Configuration 1.* MeetingPlace for Outlook on one Windows server, MeetingPlace Web on a separate Windows server.
- *Configuration 2.* MeetingPlace for Outlook Client Services and MeetingPlace Web on one Windows server, MeetingPlace for Outlook Notification Services on a separate Windows server

Configuration 1

This configuration requires two Windows servers with a shared database as follows:



Server 1: MeetingPlace for Outlook Server. This system is installed with MeetingPlace Web (4.2.7.106 or higher) with MeetingPlace Web services disabled and MeetingPlace for Outlook.

Note: When installing MeetingPlace Web on Server 1, you must indicate that the database used is that of Server 2 (your MeetingPlace Web server).

Server 2: MeetingPlace Web Server. This system is installed with MeetingPlace Web (4.2.7.106 or higher) and acts as your MeetingPlace Web server.

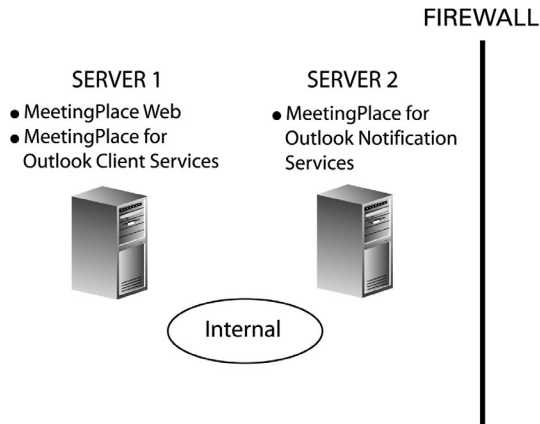
Configuration Steps

MeetingPlace Web must be installed prior to installing any MeetingPlace for Outlook components. After installation, complete the following configuration steps:

1. Disable MeetingPlace Web services on Server 1 as outlined in the “Disabling MeetingPlace Web Services” section on page 139.

Configuration 2

This configuration requires two Windows 2000 servers as follows:



Server 1. This system is installed with MeetingPlace Web (4.2.7.106 or higher) and MeetingPlace for Outlook Client Services.

Server 2. This system is installed with MeetingPlace for Outlook Notification Service. It is used for notifications only.

Configuration Steps

After installing MeetingPlace Web followed by MeetingPlace for Outlook Client Services on Server 1, install MeetingPlace for Outlook Notification Services only on Server 2. Then, complete the following configuration steps:

1. From Server 2, access the MeetingPlace Gateway Configuration Utility (Start | Settings | Control Panel) and select the Notification tab. Configure your MeetingPlace Web hostnames:

- Insert the URL of Server 1 into the **Web Hostname** field.
 - Leave the **External Web Hostname** field blank. This field is reserved for web servers in your DMZ.
2. From Server 1, access the Install directory (Start | Programs | mpweb | mpoutlook | ConfigClients.exe) and manually run the Configuration Client Setup Utility. For more information on the Configuration Client Setup Utility, refer to the appropriate section on page 36.

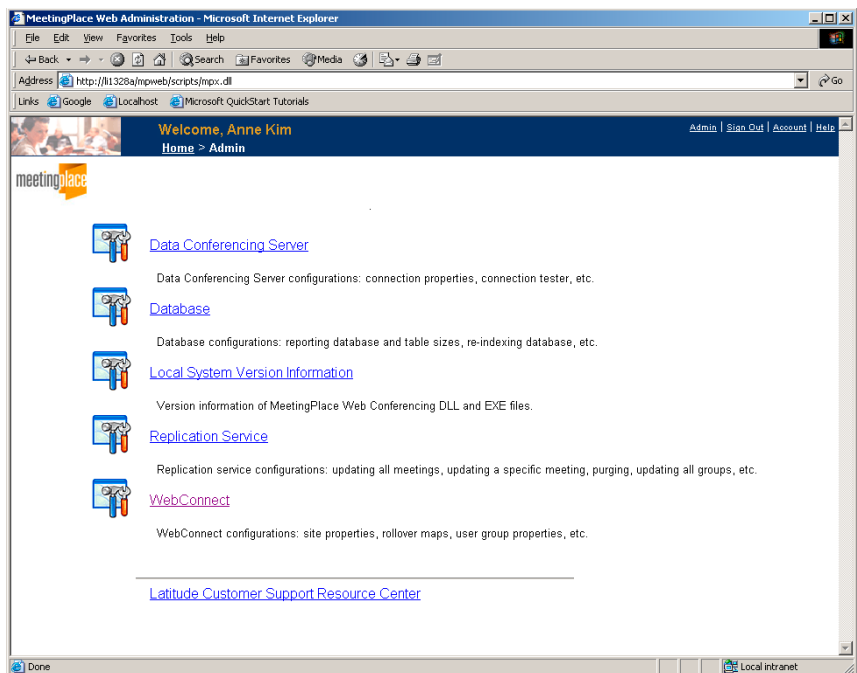
Disabling MeetingPlace Web Services

For full scheduling and notification functionality, MeetingPlace for Outlook requires prior installation of MeetingPlace Web (release 4.2.7.106 or higher) on the same machine. However, if MeetingPlace for Outlook is installed on a machine that will not be used for web conferencing, you may want to disable MeetingPlace Web services from this machine.

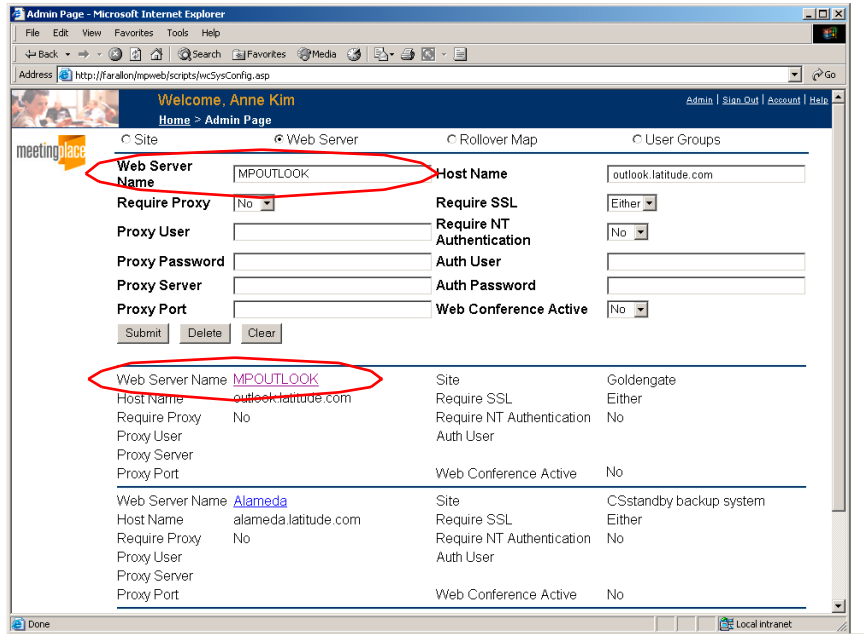
To disable MeetingPlace Web services from this machine:

1. Go to your Windows 2000 Services screen by selecting Start | Settings | Control Panel | Administrative Tools | Services
2. Disable the following six services:
 - MeetingPlace Conferencing Gateway
 - MeetingPlace Conferencing GCC
 - MeetingPlace Conferencing MCS
 - MeetingPlace Replication Service
 - MeetingPlace Conversion Agent
 - Microsoft SQL Server (MSSQLSERVER) if installed.
3. Close your Windows 2000 Services screen.

4. Open your web browser and type in the URL for MeetingPlace Web. The default URL structure is *http://your server name*.
5. When the MeetingPlace Web home page opens, sign in with an account with System Manager privileges and click **Admin** in the top right corner.



6. From the Admin page, select **WebConnect**. From the WebConnect administration page, select **Web Server**.
7. Find the MeetingPlace for Outlook gateway in the list of web servers on the bottom half of the page and select it. It populates the **Web Server Name** field above.



8. Once the Web Server Name field is populated appropriately, locate the **Web Conference Active** field and select **No**. This disables web conferencing functionality from this server.
9. When finished, click **Submit** and close the Admin page.
10. Modify the following registry keys under HKEY_LOCAL_MACHINE\SOFTWARE\Latitude\Meeting Place WebPublisher\MPAgent
 - DataConfServerType=0
 - DataConfService=0

D Upgrading MeetingPlace for Outlook

This appendix describes how to upgrade MeetingPlace for Outlook 4.1.3 or 4.2.5 to MeetingPlace for Outlook 4.2.7. Since MeetingPlace for Outlook 4.2.7 requires prior installation of MeetingPlace Web on the same machine, your upgrade path depends on which version of MeetingPlace Web you are installing.

Supported upgrade configurations include:

	MeetingPlace for Outlook 4.1.3		MeetingPlace for Outlook 4.2.5	
MeetingPlace for Outlook upgrade version	4.2.7		4.2.7	
MeetingPlace Web upgrade or add version	4.2.7.106 or higher	4.3	4.2.7.106 or higher	4.3

MeetingPlace for Outlook 3.4

If you are attempting to upgrade from MeetingPlace for Outlook 3.4, uninstall your version of MeetingPlace for Outlook and refer to Chapter 3 for instructions on completing a new installation of MeetingPlace for Outlook 4.2.7.

Note: This is the last release of MeetingPlace for Outlook that will support MeetingPlace for Outlook 3.4 meetings.

Upgrading to MeetingPlace for Outlook 4.2.7 and MeetingPlace Web 3.0 (release 4.2.7.106)

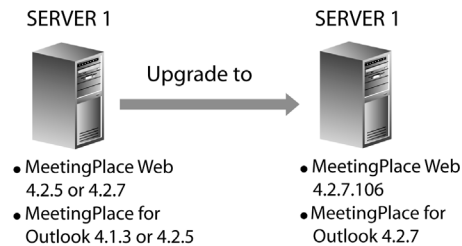
This combination of products is supported in three basic configurations:

- MeetingPlace for Outlook and MeetingPlace Web installed and therefore upgraded on the same server
- MeetingPlace for Outlook and MeetingPlace Web installed and therefore upgraded on separate servers
- Segmented meeting access configurations with an external MeetingPlace Web server in the DMZ

In all instances, MeetingPlace Web must be upgraded or installed prior to upgrading MeetingPlace for Outlook.

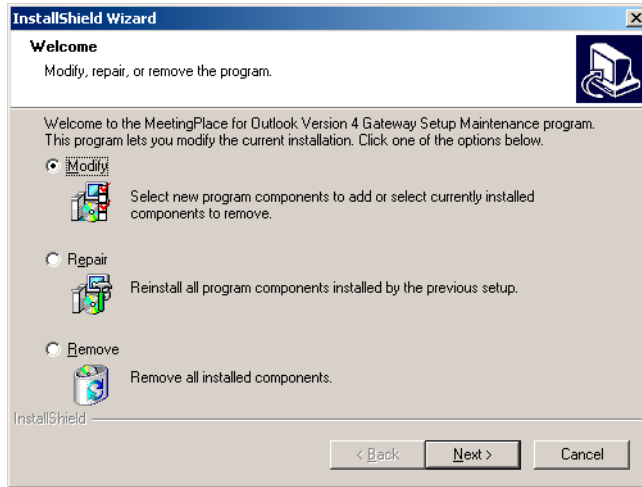
Upgrade on the Same Server

Note: To upgrade both MeetingPlace Web and MeetingPlace for Outlook on the same server, they must currently be installed on the same server.



1. Upgrade MeetingPlace Web to version 4.2.7.106 or higher. Refer to the *MeetingPlace Web 3.0 System Manager's Guide* for instructions.
2. When finished upgrading MeetingPlace Web, insert the MeetingPlace for Outlook CD and run *Setup.exe*.

3. From the InstallShield Wizard Welcome screen, choose **Modify** to upgrade your current version of MeetingPlace for Outlook.



4. Follow the instructions on the screen to complete the upgrade. When finished, restart this machine.

Notes:

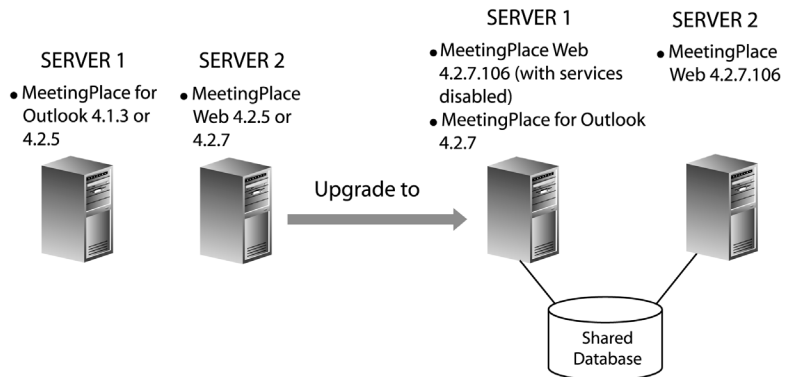
- When running the Configuration Client utility, do not change the name of your MeetingPlace server. The name of the server will be used by the Outlook client
- If planning to use Outlook 2000 with Service Release 1 and Service Pack 3, you MUST ensure that CDO is loaded before upgrading to MeetingPlace for Outlook 4.2.7. CDO is not loaded by default when loading Office 2000. It must be manually selected as an option during Office 2000 setup.

External MeetingPlace Web Server in DMZ: Additional Steps

1. If you have an additional MeetingPlace Web server in the DMZ, upgrade this server to MeetingPlace Web version 4.2.7.106 or higher.
2. From the external server, install MeetingPlace for Outlook 4.2.7 Client Services only. When finished, restart the external server.
3. From the external server, rename the *mpolschedule.htm* file to *mpolschedule.bak*. This ensures that guest users cannot schedule meetings on your MeetingPlace system. The *mpolschedule.htm* file can be found in <drive>:\Latitude\mpweb\template.

Upgrading on Separate Servers**Notes:**

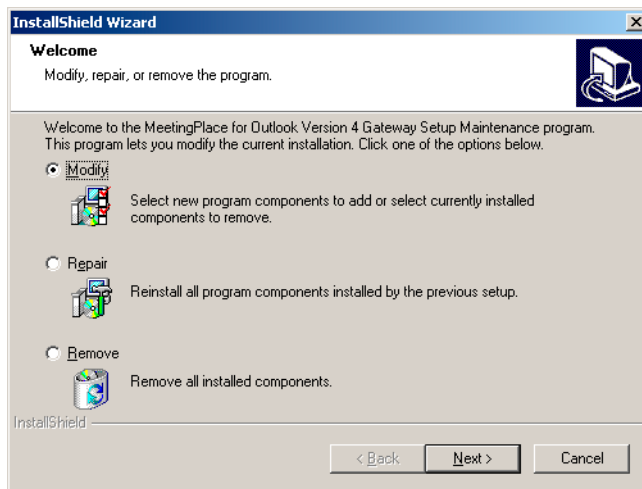
- To upgrade MeetingPlace Web and MeetingPlace for Outlook on separate servers, they must currently be installed on separate servers.
- To enable full MeetingPlace for Outlook functionality, you will need to install MeetingPlace Web 4.2.7.106 or higher on the MeetingPlace for Outlook machine even though it will not be used to host web conferences.



1. From Server 2, upgrade MeetingPlace Web to version 4.2.7.106 or higher. Refer to the *MeetingPlace Web 3.0 System Manager's Guide* for instructions.
2. From Server 1, install MeetingPlace Web 4.2.7.106 or higher. Refer to the *MeetingPlace Web 3.0 System Manager's Guide* for instructions.

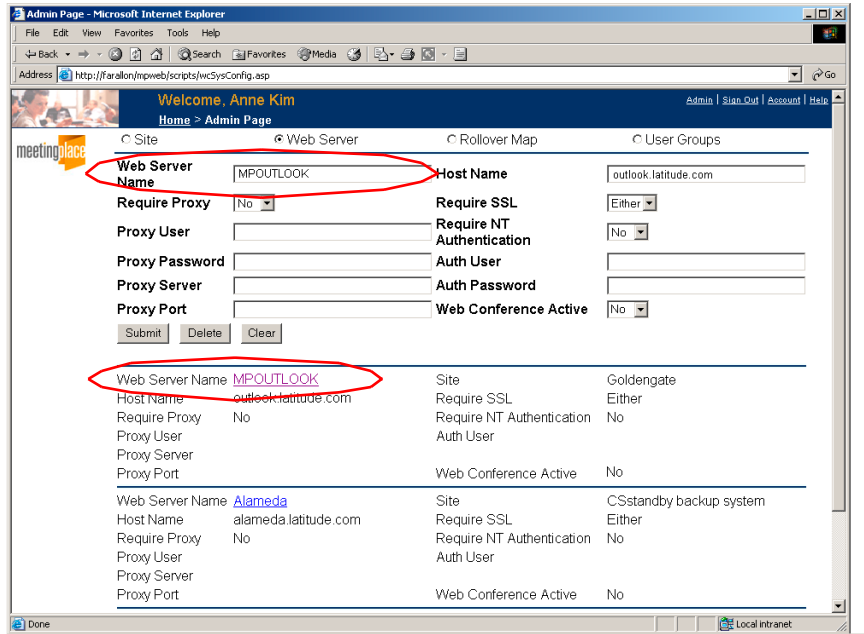
Note: When installing MeetingPlace Web on Server 1, you must indicate that the database used is that of Server 2 (your MeetingPlace Web server).

3. From Server 1, when finished installing MeetingPlace Web, insert the MeetingPlace for Outlook CD and run *Setup.exe*.
4. From the InstallShield Wizard Welcome screen, choose **Modify** to upgrade your current version of MeetingPlace for Outlook.



5. Follow the instructions on the screen to complete the upgrade. When finished, restart this machine.
6. From Server 1, disable MeetingPlace Web services as follows:

- Go to your Windows 2000 Services screen and stop the following six services:
 - a. MeetingPlace Conferencing Gateway
 - b. MeetingPlace Conferencing GCC
 - c. MeetingPlace Conferencing MCS
 - d. MeetingPlace Replication Service
 - e. MeetingPlace Conversion Agent
 - f. MeetingPlace Audio Conversion (if installed)
 - Close your Windows 2000 Services screen.
7. Open your web browser and type in the URL for your production MeetingPlace Web. The default URL structure is *http://your server name*.
 8. When the MeetingPlace Web home page opens, sign in with an account with System Manager privileges and click **Admin** in the top right corner.
 9. From the Admin page, select **WebConnect**. From the WebConnect administration page, select **Web Server**.
 10. From the bottom portion of the page, find the MeetingPlace for Outlook gateway in the list of web servers and select it. It populates the **Web Server Name** field above.



11. Once the Web Server Name field is populated appropriately, locate the **Web Conference Active** field and select **No**. This disables web conferencing functionality from this server.

12. When finished, click **Submit** and close the Admin page.

13. From Server 1, modify the following registry keys under HKEY_LOCAL_MACHINE\SOFTWARE\Latitude\Meeting Place WebPublisher\MPAgent

- DataConfServerType=0
- DataConfService=0

Note: If you have multiple MeetingPlace Web servers with WebConnect configured, from the Site administration page, set the **Warn before rolling on to site** parameter to **No**.

External MeetingPlace Web Server in DMZ: Additional Steps

1. If you have an additional MeetingPlace Web server in the DMZ, or your standalone MeetingPlace Web server (Server 2) is in the DMZ, make sure that you upgrade this server to MeetingPlace Web version 4.2.7.106 or higher.
2. From the external server, install MeetingPlace for Outlook 4.2.7 Client Services only. When finished, restart the external server.
3. From the external server, rename the *mpolschedule.htm* file to *mpolschedule.bak*. This ensures that guest users cannot schedule meetings on your MeetingPlace system. The *mpolschedule.htm* file can be found in <drive>:\Latitude\mpweb\template.

Upgrading to MeetingPlace for Outlook 4.2.7 and MeetingPlace Web 4.0 (release 4.3)

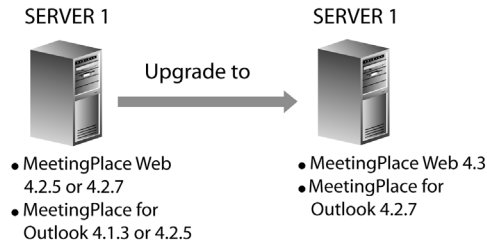
This combination of products is supported in three basic configurations:

- MeetingPlace for Outlook and MeetingPlace Web installed and therefore upgraded on the same server
- MeetingPlace for Outlook and MeetingPlace Web installed and therefore upgraded on separate servers
- Segmented meeting access configurations with an external MeetingPlace Web server in the DMZ

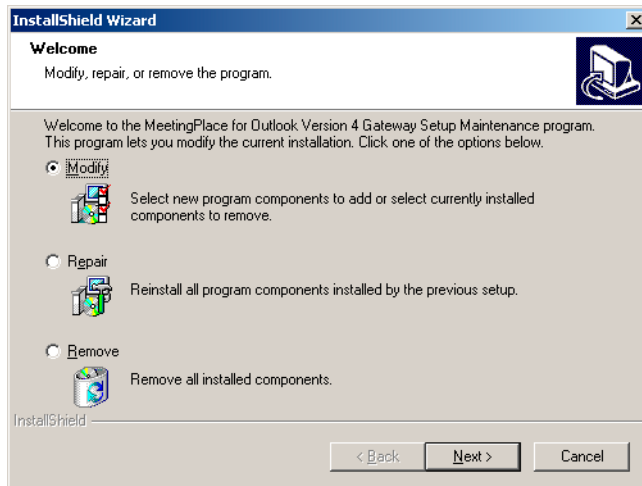
In all instances, MeetingPlace Web must be upgraded or installed prior to upgrading MeetingPlace for Outlook.

Upgrade on the Same Server

Note: To upgrade both MeetingPlace Web and MeetingPlace for Outlook on the same server, they must currently be installed on the same server.



1. Upgrade MeetingPlace Web to version 4.3. Refer to the *MeetingPlace Web 4.0 System Manager's Guide* for instructions.
2. When finished upgrading MeetingPlace Web, insert the MeetingPlace for Outlook CD and run *Setup.exe*.
3. From the InstallShield Wizard Welcome screen, choose **Modify** to upgrade your current version of MeetingPlace for Outlook.



4. Follow the instructions on the screen to complete the upgrade. When finished, restart this machine.

Notes:

- When running the Configuration Client utility, do not change the name of your MeetingPlace server. The name of the server will be used by the Outlook client.
- If planning to use Outlook 2000 with Service Release 1 and Service Pack 3, you MUST ensure that CDO is loaded before upgrading to MeetingPlace for Outlook 4.2.7. CDO is not loaded by default when loading Office 2000. It must be manually selected as an option during Office 2000 setup.

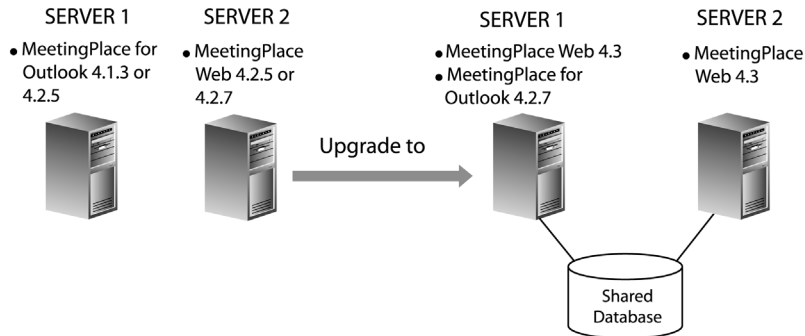
External MeetingPlace Web Server in DMZ: Additional Steps

1. If you have an additional MeetingPlace Web server in the DMZ, upgrade this server to MeetingPlace Web version 4.3.
2. From the external server, install MeetingPlace for Outlook 4.2.7 Client Services only. When finished, restart the external server.
3. From the external server, rename the *mpolschedule.htm* file to *mpolschedule.bak*. This ensures that guest users cannot schedule meetings on your MeetingPlace system. The *mpolschedule.htm* file can be found in <drive>:\Latitude\mpweb\template.

Upgrading on Separate Servers

Notes:

- To upgrade MeetingPlace Web and MeetingPlace for Outlook on separate servers, they must currently be installed on separate servers.
- To enable full MeetingPlace for Outlook functionality, you will need to install MeetingPlace Web 4.3 on the MeetingPlace for Outlook machine even though it will not be used to host web conferences.

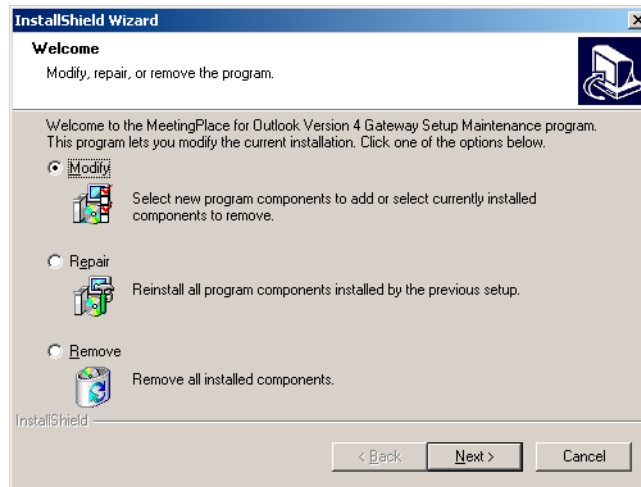


1. From Server 2, upgrade MeetingPlace Web to version 4.3. Refer to the *MeetingPlace Web 4.0 System Manager's Guide* for instructions.
2. From Server 1, install MeetingPlace Web 4.3. Refer to the *MeetingPlace Web 4.0 System Manager's Guide* for instructions.

Note: When installing MeetingPlace Web on Server 1, you must indicate that the database used is that of Server 2 (your MeetingPlace Web server).

3. From Server 1, when finished installing MeetingPlace Web, insert the MeetingPlace for Outlook CD and run *Setup.exe*.

- From the InstallShield Wizard Welcome screen, choose **Modify** to upgrade your current version of MeetingPlace for Outlook.



- Follow the instructions on the screen to complete the upgrade. When finished, restart this machine.
- Open your web browser and type in the URL for production MeetingPlace Web. The default URL structure is *http://your server name*.
- When the MeetingPlace Web home page opens, sign in with an account with System Manager privileges and click **Admin** in the top right corner.
- From the Admin page, select **Web Server Properties**. From the bottom portion of the Web Server administration page, find the MeetingPlace for Outlook gateway in the list of web servers and select it. It populates the **Web Server Name** field in the top portion of the page.

9. Once the Web Server Name field is populated appropriately, locate the **Web Conference Active** field and select **No**. This disables web conferencing functionality from this server.
10. When finished, click **Submit** and close the Admin page.

Note: If you have multiple MeetingPlace Web servers with WebConnect configured, from the Site administration page, set the **Warn before rolling on to site** parameter to **No**.

External MeetingPlace Web Server in DMZ: Additional Steps

1. If you have an additional MeetingPlace Web server in the DMZ, or your standalone MeetingPlace Web server (Server 2) is in the DMZ, make sure that this server is upgraded to MeetingPlace Web version 4.3.

2. From the external server, install MeetingPlace for Outlook 4.2.7 Client Services only. When finished, restart the external server.
3. From the external server, rename the *mpolschedule.htm* file to *mpolschedule.bak*. This ensures that guest users cannot schedule meetings on your MeetingPlace system. The *mpolschedule.htm* file can be found in <drive>:\Latitude\mpweb\template.

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