

# ▶ Polycom® Conferencing for Microsoft® Outlook An Overview

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## Challenges Facing Organizations Today

Although visual communication has been widely adopted and has become a valid alternative to travel and a means to increase productivity, several challenges still exist.

Many workers have preconception and concerns that need to be addressed such as these:

- Not everyone feels comfortable with video conferencing technology
- Some users fear that video conferencing may not be easy to use
- Process to include voice and video for a meeting may be too complex or time-consuming

In addition, IT administrators have a different set of challenges to overcome, such as the following:

- Time and resources to assist users may not be scalable
- IT organizations need to actively drive adoption of video application to achieve maximum ROI
- Need to enhance the conference room experience and provide consistent user experience for PC desktop and video conferencing
- Administration of video-enabled unified communications (UC) can be complex

## Simplify Conferencing by Leveraging Microsoft® Outlook

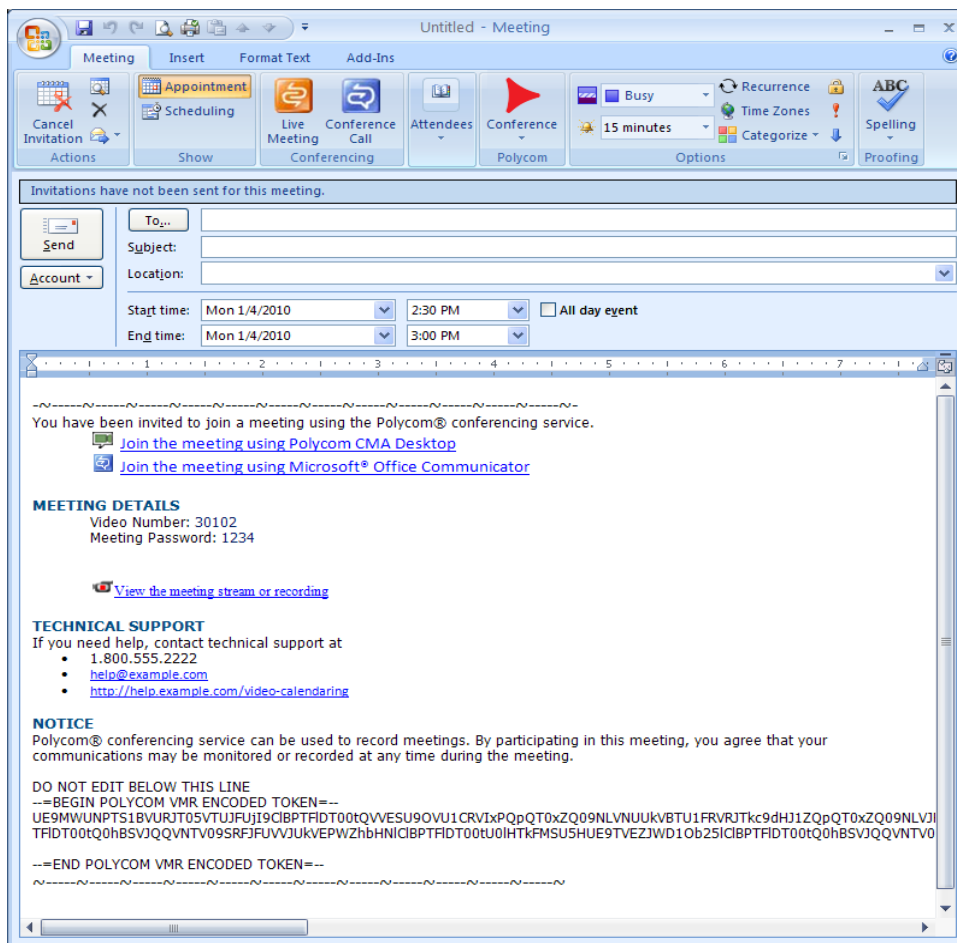


Figure 1: By clicking on the Polycom Conferencing for Outlook icon, meeting information is generated, including the meeting ID and links to call from the PC video application.

Polycom® Conferencing for Microsoft® Outlook leverages Microsoft Exchange Server 2007 and 2010 and Microsoft Outlook 2007 and 2010 to schedule voice- and video-enabled meetings using a familiar interface.

When it is necessary to schedule a voice- and video-enabled meeting, conference organizers simply create a regular meeting invitation and conference-enable the meeting with one click on the Polycom Conferencing for Outlook icon:

- Meeting ID is generated. This is a unique and random number assigned for the meeting.
- Meeting body is populated with the meeting information, including supporting information (based on the configurable template) and metadata to be read by Polycom components.

Depending on the video platform (H.323 or Office Communications Server environment) and availability of analog audio and recording and live streaming capabilities, the template may contain the following information:

- A Link that allows users to launch a call to the meeting server without entering meeting ID manually (Polycom CMA™ Desktop and/or Microsoft Office Communicator)
- The audio dial-in number (PSTN)
- Links for the Recording Server and Live Streaming

An example of the text generated is shown in Figure 1.

### Live Streaming, Recording, and Meeting Password Option

During the scheduling process, conference organizers can easily add recording and live streaming to the meeting, or assign a meeting password for security purposes. These operations can be easily managed from meeting option menu.

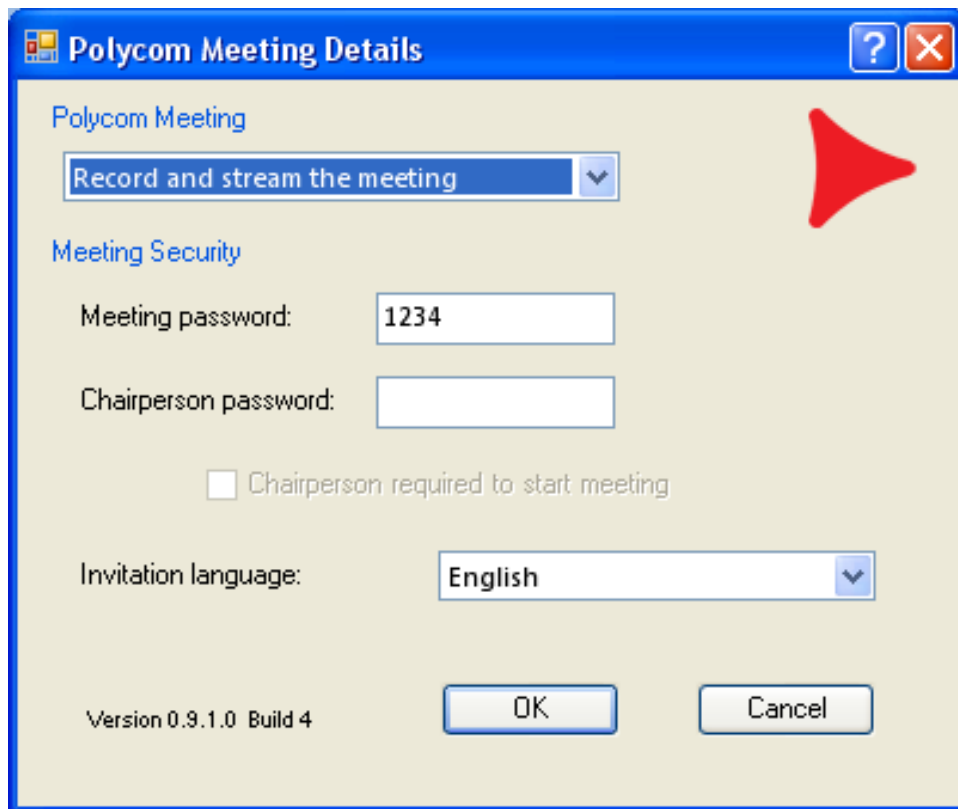


Figure 2: “Do not record or stream the meeting,” “Record the meeting,” and “Record and stream the meeting” are three options available.

Note that administrators can lock down these settings and not allow changes.

By including the recording and live streaming, the meeting invitation will include a hyperlink to access the recording and streaming server. Workers who miss a meeting may simply click on the link to access the recorded meeting at later time.

### **Smart Room Experience with Polycom HDX® Onscreen Calendar**

When a Polycom HDX® system is configured to read an Exchange account (a person or resource account), then the HDX monitors the calendar of the associated account and displays the calendar for the day.

The HDX system also displays meeting notification as the meeting time approaches.

Since the HDX system can display all the meetings scheduled for the day, it can turn into smart room device in the room.

Private meetings can be configured to appear as “private” and not show any meeting details.

Since the HDX system displays meetings on its calendar, conference participants can simply select meetings, and then press the “Join Now” button to join a conference.

### **Joining Scheduled Meetings from PC and HDX**

With the Polycom Conferencing for Microsoft Outlook solution, meeting participants can join the scheduled call easily from their PC desktop and Polycom HDX systems.

As shown earlier, meeting participants can simply open the meeting invitation and click on the call to link to initiate the call.

Depending on the call signaling platform, you may have different call to links:

- H.323 Network with CMA as a gatekeeper and CMA Desktop as video client
- Microsoft Office Communications Server network with Microsoft Communicator as video client

Also, when the HDX system is configured for the Exchange Calendaring setting, meeting participants can select the meeting from calendar screen and press “Join Now” to initiate the call.

The result is a consistent user experience between PC desktop application and HDX systems.

Note: Meeting participants from non-HDX video conferencing systems can enter meeting ID manually to join the meeting.

### **Gathering Phase on Polycom RMX® Meeting Room**

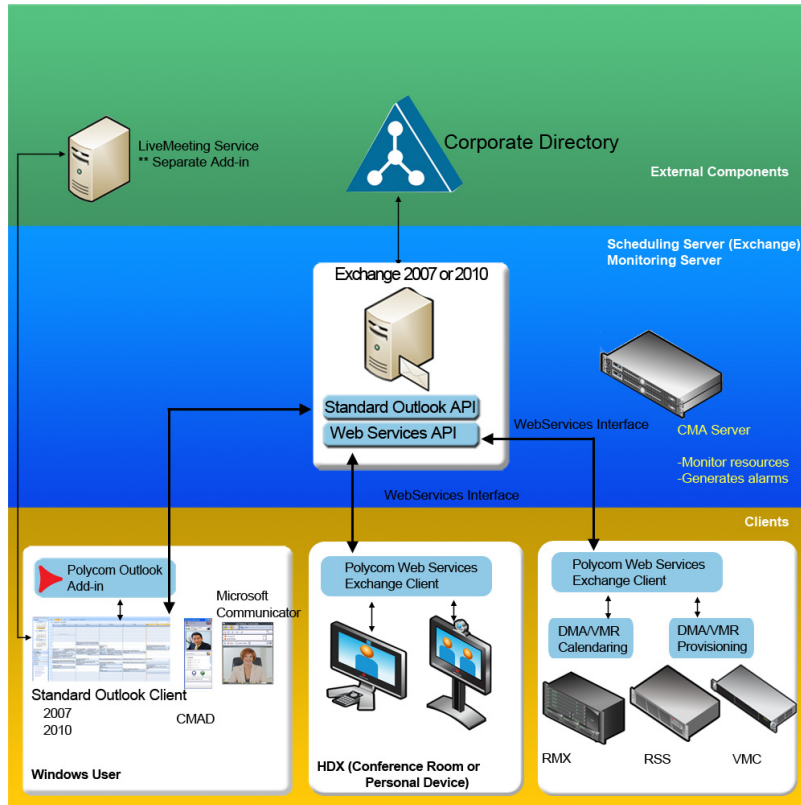
Once video participants join the meeting on the Polycom RMX® conference server, they will see the gathering screen until they wait for the meeting to start. During the gathering phase, people can see the video preview window as well as talk to each other, but the meeting information screen is displayed.

- Meeting subject
- Meeting organizer
- System name (video participants)
- Meeting access number
- Video preview (with active speaker indication)

- Number of audio and video participants

The length of the gathering phase can be configured on the RMX server.

### Solution Diagram



### Ensuring Successful Integration—UC Professional Services

Polycom Professional Services and our certified Partners provide expertise to address the intricacies of integrating Polycom video solutions into complex communications environments, including:

- Evaluation of your company's business goals, usage levels, types of technologies, and geographic diversity
- Planning and design to help ensure maximum utilization of your current infrastructure
- Project-managed deployment to help ensure timeliness and optimization of technology
- implementation and adoption

Three professional services are available:

- Solution Planning & Design
- Pilot Deployment
- Full Deployment

Polycom Implementation and Maintenance services provide support for Polycom solution components only. Additional services for supported third-party Unified Communications (UC) environments integrated with Polycom solutions are available from Polycom Global Services and its certified Partners. These additional services will help customers successfully design, deploy, optimize and manage Polycom visual communications within their UC environments.

Professional Services for Microsoft Integration is required for Polycom Conferencing for Microsoft Outlook and Microsoft Office Communications Server integrations.

For additional information and details please see

- [http://www.polycom.com/services/professional\\_services/index.html](http://www.polycom.com/services/professional_services/index.html)  
or contact your local Polycom representative

### **Summary — Customer Benefits**

Polycom Conferencing for Microsoft Outlook can definitely simplify the process of conferencing for both end users and administrators alike. Some of the benefits that can be expected include the following:

- Increased adoption of visual communication due to simple, intuitive interface
- HDX system can be used as a smart room device showing the schedules and displaying reminder for the pending meeting
- Higher productivity because less time spent getting ready for the meeting and more time spent for actual meeting
- Fewer user errors, and reduced needs for user assistance for administrators
- Simple administration of video-enabled Unified Communications

### **Resources**

Polycom Microsoft Page

<http://www.polycom.com/Microsoft>

Polycom UC Professional Services Page

[http://www.polycom.com/services/professional\\_services/unified\\_communications.html](http://www.polycom.com/services/professional_services/unified_communications.html)

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