



LifeSize Control™

Installing Microsoft Exchange Integration for LifeSize Control™



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Introduction

The Microsoft Exchange Integration for LifeSize Control package is an optional component of the LifeSize Control management software product. The Microsoft Exchange Integration for LifeSize Control package provides automatic propagation of devices in the global address book on the Microsoft Exchange Server. By installing this package, you will have the ability to add, change, and delete conferences using Microsoft Outlook.

System Requirements

You must install the following applications prior to installing the Microsoft Exchange Integration for LifeSize Control package:

- Microsoft Exchange Server 2003 with Service Pack 1. Perform a complete installation of Microsoft Exchange Server 2003 to install all the required components for running the Microsoft Exchange Integration for LifeSize Control, including the Microsoft Exchange Server Management Tools.
- IIS 6 with ASP.NET.
- LifeSize Control. Ensure that you have successfully installed LifeSize Control and configured your environment as described in the *LifeSize Control Installation Guide*. If you intend to install both the Microsoft Exchange Integration for LifeSize Control package and LifeSize Control on the same machine, install LifeSize Control first.

Installing Microsoft Exchange Integration for LifeSize Control

Many Microsoft Exchange environments consist of two servers: one that is the Message Transfer Agent (MTA) or front end server, and a second back end message store server. Install the Microsoft Exchange Integration for LifeSize Control package on the back end server.

To install the Microsoft Exchange Integration for LifeSize Control package, follow these steps:

1. Log in as the domain administrator.
2. From the Microsoft Exchange Integration for LifeSize Control package, open the **Exchange** folder and run **setup.exe**.
3. Click **Next** on the **Welcome** screen.
4. Accept the terms of the license agreement and click **Next**.
5. Complete the **Customer Information** screen and click **Next**.
6. Select **Complete** to install all package components and click **Next**.

Note: You can change the default installation path by choosing **Custom**.

7. Click **Install** to begin the installation.

Configuring Microsoft Exchange Integration for LifeSize Control

Upon completion of the installation, the **Configuration Settings** screen appears. To configure Microsoft Exchange Integration for LifeSize Control, follow these steps:

1. Enter the **Microsoft Exchange Organization Name**. The installer automatically completes the other fields.

To determine the Microsoft Exchange Organization Name, follow these steps:

- a. Choose **Start> All Programs>Microsoft Exchange>System Manager**.
- b. The root folder identifies the organization name. Exclude the text in parentheses. For example, if the root folder name is:

EXCHLIFESIZE (Exchange)

then the organization name is:

EXCHLIFESIZE

2. Click **Next**.
3. Enter the following:
 - Domain name for the administrator of the Microsoft Exchange Server
 - Administrator username and password for the administrator of the domain on which the Microsoft Exchange Server is installed.

Note: This administrator must have sufficient permission to create Active Directory users and mailboxes.

- LifeSize Control server IP address.

The executables and batch files required to configure Microsoft Exchange Integration for LifeSize Control launch.

4. Click **Next**.

Installing the Auto Accept COM+ Component

5. Select the information source you want to use with Microsoft Outlook and click **Next**.
6. Enter the Microsoft Exchange Server name.
7. Enter the Microsoft Exchange Mailbox name.
8. Click **Next**.
9. Answer Yes or No regarding whether the computer is used for travel.
10. Click **Finish**.

Installing the Auto Accept COM+ Component

The Auto Accept COM+ component processes and accepts meeting requests for devices, checks the availability of the resource's calendar, and sends an accept or decline message for the meeting.

Note: Install this component on the Microsoft Exchange Server.

1. Log in to the Microsoft Exchange Server as the domain administrator.
2. From the Microsoft Exchange Integration for LifeSize Control package, open the **Exchange\AutoAccept** folder and run **AutoAcceptSetup.msi**.
 - a. Click **Next** on the **Welcome** screen.
 - b. Specify the installation folder or accept the default.
 - c. To install LscExchAutoAccept for yourself or for anyone who uses this computer, select the **Everyone** radio dialog button and click **Next**.
 - d. Confirm the installation and click **Next**.
 - e. Click **Close** on the **Installation Complete** dialog.

Establishing Settings for Publishing the LifeSize Meeting Request Outlook Form

Prior to publishing the LifeSize Meeting Request, you must establish settings in the System Manager.

Two views are available on **Folders > Public Folders**.

- Public Folder View
- System Folder View

To select these views, right click on **Public Folder** and choose **View Public Folders/View System Folder**. The default view is **Public Folders**.

To establish settings for publishing, follow these steps:

1. Select **Start > All Programs > Microsoft Exchange > System Manager**.
2. Select **Folders > Public Folders**.
3. Right click on **Public Folders** and select **View System Folders**.
4. Expand **EFORMS_REGISTRY**.
5. Right click **LifeSizeMeetingRequest** and select **Properties**.
6. Select the **Permissions** tab.
7. Click the **Administrative Rights** button.
8. Choose **Everyone**.
9. Ensure the **Allow** checkboxes are marked for the following values:
 - Control Access
 - Administer Information Store
 - View Information Store Status

Note: Once you mark the **Control Access** checkbox, all other checkboxes are automatically marked.

Creating the Outlook Security Settings Public Folder on the Microsoft Exchange Server

10. Click **OK**.
11. Click **OK**.
12. Close the system manager.

This establishes the settings required for publishing the form in the organizational folder.

Creating the Outlook Security Settings Public Folder on the Microsoft Exchange Server

To create the public folder on the Microsoft Exchange Server, follow these steps:

1. Select **Start > All Programs > Microsoft Exchange > System Manager**.
2. Select **Folder > Public Folders** (expand the public folder view).
3. Right click on the **Outlook Security Settings** folder and select **Properties**.
4. Select the **Permissions** tab.
5. Click the **Administrative Rights** button.
6. Select **Everyone**.
7. Mark the **Allow** checkbox for the **View information Store Status** value.
8. Click **OK**.
9. Click **OK**.

Microsoft Outlook Configurations

You must install the Microsoft Outlook Integration for LifeSize Control component on each machine on which the Microsoft Outlook client is installed. You will need the assistance of a System Administrator to complete the installation.

This procedure is applicable to Microsoft Outlook XP 2002 and Microsoft Outlook 2003.

Installing Microsoft Outlook 2003 or Microsoft Outlook XP 2002 from CD

Perform a complete installation of Microsoft Outlook 2003/2002 to install all the required components for running Microsoft Exchange Integration for LifeSize Control.

For Outlook 2002, you must separately install the add-on component **Microsoft Office XP Web Services Toolkit 2.0**, as follows:

1. From the Microsoft Exchange Integration for LifeSize Control package, open the **Outlook > Tools > Office XP Web Services Toolkit** folder.
2. Run **setup.exe**.
3. Accept the license agreement and click **Install**.
4. Click **Finish**.

Configuring the Microsoft Outlook Mail Settings with Microsoft Exchange Server

To configure the Microsoft Outlook mail settings, follow these steps:

1. Log in as the administrator of the Microsoft Exchange Server.
2. On the **Exchange Server Settings** screen, ensure that you unmark the **Use Cached Exchange Mode** checkbox, which is enabled by default.
3. Close Outlook.

Installing the Microsoft Outlook Integration for LifeSize Control Package

1. From the Microsoft Exchange Integration for LifeSize Control package, open the **Outlook** folder and run **setup.exe**.
2. Click **Next** on the **Welcome** screen.
3. Accept the license agreement and click **Next**.
4. Enter your customer information and click **Next**.
5. For setup type, choose **Complete** and click **Next**.

Note: You can change the default installation path by choosing **Custom Setup**.

6. Enter the **Microsoft Exchange Server IP Address** and click **Next** to install Outlook.
7. Click **Install**.
8. Click **Finish** on the **Installation Complete** screen.

Publishing the LifeSizeMeetingRequest.otf Outlook Form

You must execute this task on a machine on which Microsoft Outlook 2002 or 2003 is installed. You perform this only one time.

1. Log in as the domain administrator for the Microsoft Exchange Server.
2. From the Microsoft Exchange Integration for LifeSize Control package, run **PubOrgForm.exe**.
 - If a dialog prompts you to choose the **Outlook Profile** configured for the Microsoft Exchange administrator, choose the **Administrator Profile**.
 - If a dialog prompts you to **Disable Macros / Enable Macros**, choose **Disable Macros**.

A success message displays, and the form is published to the organizational folder.

Enabling Scripts via Form and Utility/Registry Changes

In order to modify and delete meetings, you must enable scripts. You perform this only one time.

OutlookSecurity.oft is an Outlook template that enables you to customize the security settings on the Microsoft Exchange Server. The Microsoft Exchange Installer creates the Outlook Security Settings public folder.

To use the Outlook Security template to modify settings on the Outlook client machine, follow these steps:

1. From the Microsoft Exchange Integration for LifeSize Control package, perform these task:
 - a. Locate **Outlook > Publishing Outlook Security Form** and run the **PubOutSecurity.exe** file.
 - b. Navigate to Public Folders and to the **Outlook Security Settings** public folder.
A success message displays for publishing the Outlook security form.
 - c. Click **OK**.
2. Open Microsoft Outlook and perform these tasks:
 - a. Navigate to the **Public Folder > All Public Folders > Outlook Security Settings** folder.
 - b. Right click on **Outlook Security Settings** and select **Properties**.
 - c. In the **When posting to this folder, use:** list, click **Outlook Security Form**, and then click **OK**.
3. From Microsoft Outlook, perform these tasks:
 - a. Select **Tools > Forms > Choose Form**.
 - b. From the **Look In** dropdown menu, select **Outlook Security Settings** and then select **Outlook Security Form**.

Microsoft Outlook Configurations

- c. Click **Open**.

You may safely disregard any informational messages that appear at this time, such as enabling or disabling macros.

- d. Select the **Outlook Security Settings** tab.
- e. Check **Enable Scripts in one-off Outlook forms** from the **Miscellaneous Custom Form Settings** box.
- f. Enable the **Automatically approve** dialog for the following options:
- When executing a custom action via an Outlook object model.
 - When accessing the **ItemProperty** of a control on an Outlook custom form.
- g. Choose the **Programmatic Settings** tab.
- h. Enable **Automatically Approve** for all options listed.
- i. Click **Close**.
- j. Click **Yes** to save changes.

Note: Prompts for the administrator password may display to save the form.

4. Close and re-open Outlook.

Configuring the Microsoft Exchange Web Service URL in LifeSize Control

Configuring the Microsoft Exchange Web Service URL is required only if you do not specify the IP address of the Microsoft Exchange Server URL during configuration of LifeSize Control, or if you want to use a different Microsoft Exchange Server.

To configure the Microsoft Exchange Web Service URL, follow these steps:

1. Stop LifeSize Control.
2. From the command prompt, navigate to the following directory:
`<LSC_HOME>\LscUtils\`
3. At the command prompt, enter **exchurl <ipaddress>** in which **<ipaddress>** is the Microsoft Exchange Server IP address. This updates the Microsoft Exchange Server IP address in the configuration files.
4. Restart LifeSize Control.

Using Microsoft Exchange Integration for LifeSize Control

Once you have successfully installed the Microsoft Exchange Integration for LifeSize Control package, your devices are automatically propagated in the global address book on the Microsoft Exchange Server.

Adding a Conference

To add a conference, follow these steps:

1. Open Microsoft Outlook.
2. Choose one of the following methods to initiate a new meeting:
 - a. Open **Tools > Forms > Choose Form**.
 - b. In the **Look in:** box, select **Organizational Forms Library**.
 - c. Select **LifeSizeMeetingRequest** from the list.

OR

- a. Select **New > Meeting Request**.

Note: The LifeSize meeting request form replaces the default Microsoft Outlook meeting request form. Due to extended security features in Microsoft Outlook 2002/2003, you may receive messages regarding the following:

- A prompt to enable or disable macros. Enable macros.
 - A prompt that a program is trying to access e-mail addresses you have stored in Outlook. Mark the checkbox to allow access for 10 minutes.
 - A prompt that a program is trying to automatically send email on your behalf. Click **Yes**.
3. From the **Select Attendees and Resources** dialog, select **Global Address List** from the **Show Names** dropdown list.

Using Microsoft Exchange Integration for LifeSize Control

4. Select the participants you wish to add to the meeting and add them as **Required** or **Optional**.
5. Select the audio and/or video resources you wish to add to the meeting and add them as **Resources**.
Note: The prefix of the device name indicates whether it is a video or audio device. The suffix of the device name indicates whether the device is managed (*mng*) or unmanaged (*umng*). You must select managed devices for resources.
6. Choose the meeting time and subject.
7. If you wish to enable video conferencing capabilities, select the **Video Conference** tab.
 - a. Mark the **Enable Video Conferencing** checkbox.
 - b. Add external participants by entering their IP addresses and clicking the **Add** button.
8. If you wish to modify call settings, select the **Advanced Options** tab.
 - a. Unmark the **Auto Established** checkbox.
 - b. Select the **Reservation Type**, **Speed**, and **Transport Protocol** from the **Advanced Options** box.
 - c. Select a **Calling Station**.
9. Click either the **Complete the Booking** or the **Send** button.

If there are no resource conflicts, the Microsoft Exchange Server accepts the meeting on behalf of the devices, and the meeting is added to the LifeSize Control database.

To view the meeting in LifeSize Control, click the **Scheduler** button on the navigation bar. Refer to the online help for more information about using LifeSize Control.