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collaborate

right people right place right time Meeting Maker[®] Connector for Microsoft[®] Outlook[®] Client

User's Guide

right now

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November 2005

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About this Guide

This guide describes how to install and use the Meeting Maker[®] Connector for Microsoft[®] Outlook[®] (MMCO) client. This guide is for Microsoft Outlook users who have experience installing software on their computers and scheduling events in Microsoft Outlook.

Section Description	
Chapter 1: About the Connector Client	How the MMCO works, features, components, system requirements, and Meeting Maker icons.
Chapter 2: Installing the Connector Client	Installation, entering logon values, and uninstalling.
Chapter 3: Creating Activities	Creating activities, using the Scheduling and Tracking tabs, receiving and responding to proposals.
Chapter 4: Configuring Activities	All day events, reminders, show time as, and recurrence patterns.
Chapter 5: Customizing Meeting Maker Options	Meeting Maker menu, synchronization schedule, error log, and changing the logon values.
Chapter 6: Troubleshooting	Calendar, synchronization conflicts, and automatic data recovery; offline status, error messages, usage tips, blocked recurrence patterns, and synchronization considerations.

Related Documentation

- Microsoft Outlook Documentation
- Meeting Maker User Guide

About the Connector Client

Overview

The Meeting Maker[®] Connector for Microsoft[®] Outlook[®] (MMCO) is a software application that integrates the collaborative scheduling features of Meeting Maker Millennium into Microsoft Outlook. The MMCO enables Meeting Maker and Microsoft Outlook users throughout an organization to schedule events and reserve resources using either application.

IMPORTANT NOTE

Do not use any other Meeting Maker client to make any changes, such as the native client, the HTML client, etc. It is highly recommended that none of your proxies have read-write access to your calendar. If you use the MMCO client and you or a proxy makes changes to your calendar from another Meeting Maker client, unpredictable behavior will occur.



▲ Information flow between Meeting Maker and Microsoft Outlook

Features

The MMCO provides seamless integration between the Meeting Maker and Microsoft Outlook platforms. Microsoft Outlook users can access the advanced scheduling features of Meeting Maker through the Microsoft Outlook user interface. This table describes the key features of MMCO.

Component	Description	
Real time calendar access	Continuous synchronization with the Meeting Maker server keeps user calendars current and accessible.	
Central database	One central database stores user schedules to keep conflicting calendar information at a minimum.	
Resource protection	Resources and locations are available on a first-come first- served basis to avoid double booking.	
Expanded address book	Address book includes Meeting Maker users and Microsoft Outlook users within one category, Meeting Maker resources and locations.	
Copy (CC) and blind copy (BCC)	Copy and blind copy invitations to Meeting Maker users.	
Restricts event modifications to the originator	Attendees cannot change the meeting agenda.	
Send instant comments	Pop-up dialog box enables you to send comments to the event originator at response.	
Conflict resolution	Simultaneous calendar editing provides highlighted conflict resolution data in a dedicated folder.	
Personal digital Assistant (PDA) support	Synchronize Meeting Maker and Microsoft Outlook calendar data to personal digital assistants (PDAs).	

Package Contents

Your system administrator will provide you with these files:

- MMCO installation program
- MMCO User Guide in PDF format

Client Software Requirements

This table lists the software requirements for your client to run MMCO. In addition to these requirements, Meeting Maker Server version 8.5 or higher and Meeting Maker Web Services version 8.5 or higher must be installed.

Operating System	 Microsoft Windows 2000 (Service Pack 4) Microsoft Windows XP (Service Pack 1) (Windows XP must support domain names.)
Software	 Meeting Maker Millennium, 8.5 or later One of these Microsoft Outlook versions: 2003; email server SMTP or POP 2002 2000 (Service Pack 3); Corporate/Workgroup or IMO

Note: The MMCO does not support Microsoft Exchange[®]. If your system is running Exchange, see your system administrator.

Synchronizing with Meeting Maker, Palm, and Outlook

If you would like to synchronize among Meeting Maker, a Palm device, and Outlook, you can only synchronize one or two of three synchronization paths. You should never use all three synchronization paths; or, you will get duplication of all your events.

For example, if you previously synchronized from **MM** \Rightarrow **Palm** and then synchronized **MM** \Rightarrow **Outlook** and then you synchronize **Palm** \Rightarrow **Outlook**, Palm and Outlook do not reference Meeting Maker. The Palm device and Outlook do not know that the meetings and activities that synchronized from Meeting Maker to Palm are the same as from Meeting Maker to Outlook. You will get duplicates of those events on both Palm and on Outlook.

You will need to make a decision about which one or two of the three synchronization paths to choose. You should not to choose all three paths or duplicates will occur.

Remember that you should never use any other Meeting Maker client to make any changes, such as the native client, the HTML client, etc. It is highly recommended that none of your proxies have read-write access to your calendar.



- Warning: If you have previously synchronized Meeting Maker ⇔ Palm device and now would like to synchronize Meeting Maker ⇔ Outlook and Outlook ⇔ Palm device, you must perform a *Hard Reset* to remove all the data on your handheld. Failure to do this will result in duplicate activities and meetings.
- **Warning:** If you use the Meeting Maker Connector for Outlook, you should not use Meeting Maker for Intellisync as duplication may occur.

Installing the Connector Client

Before you Begin

- 1 Ensure your computer meets the software requirements on page 3.
- 2 Obtain these Meeting Maker logon values from your system administrator:
 - MMCO installation program
 - Meeting Maker User Name
 - Meeting Maker Password
 - Meeting Maker Server Name
 - Meeting Maker Web Service URL

Installing the Connector

- 1 Exit all Microsoft Windows programs, including Outlook.
- **2** Copy the MMCO installation program to your computer.
- **3** Double-click the MMCO installation program.

The Welcome screen appears.

Note: If an earlier version of MMCO is installed, you will have the option to uninstall it automatically.



- 4 Click Next.
- **5** Enter your user information and select whether only you will have access to MMCO or any user on this computer.

🔀 Meeting Maker Con	nector for Microsoft Outlook Setup	
User Information Enter the following inform	nation to personalize your installation.	Ø
Full N <u>a</u> me:	Your Name	1
Organization:	Meeting Maker, Inc.	
	pplication can be installed for the current user or for all u You must have administrator rights to install the settings fo ication for: <u>Anyone who uses this computer</u> Only for <u>m</u> e (Steven Ingles)	
	< <u>₿</u> ack <u>N</u> ext >	Cancel

6 Click Next.

- **7** Select the destination folder.
 - Click Next to accept the default folder: c:\Program Files\meetingmaker
 - Click **Browse** to select an alternate folder:

🕼 Meeting Maker Connector for Microsoft Outlook Setup	
Destination Folder Select a folder where the application will be installed.	Ø
The Wise Installation Wizard will install the files for Meeting Maker Connector for Microsoft Outlook in the following folder. To install into a different folder, click the Browse button, and select another folder. You can choose not to install Meeting Maker Connector for Microsoft Outlook by clicking Cancel to exit the Wise Installation Wizard.	
Destination Folder C:\Program Files\meetingmaker\ B <u>r</u> owse	
< <u>B</u> ack <u>Next</u> >	Cancel

8 Click Next.

The Ready to Install the Application dialog box appears.

9 Click Next.

The Updating System screen appears during installation. When finished, the Installation Complete dialog appears.



10 Click Finish.

The readme.html file appears.

Review the readme.html file before you use MMCO.

Entering the Meeting Maker Logon Values

The first time you start Microsoft Outlook after installing MMCO, you must enter the Meeting Maker logon values supplied by your system administrator. The logon values enable communication and calendar sharing between Microsoft Outlook and the Meeting Maker server.

1 Start Microsoft Outlook.

This screen appears.

Meeting	Maker Connector		
?	One or more logon values are missing Do you want to enter those now? Yes), preventing sync	hronization with Meeting Maker.

2 Click Yes.

This screen appears.

😡 Welcome to Mee	eting Maker®	
Please enter your log	on values	
User <u>N</u> ame	SignInName	
<u>P</u> assword	****	
<u>S</u> erver	YourMMServer	
Meeting Make	er <u>C</u> onnection URL	
http://127.0	.0.1:8080/mmco/serv	vices/MM
<u> </u>	erify Car	ncel

- **Note:** If your Meeting Maker logon values are stored in your Microsoft Outlook profile, the *User Name*, *Password*, and *Server* fields are populated with your logon data.
- **3** Enter your Meeting Maker logon values.

Field	Description
User Name	Meeting Maker user name associated with your Microsoft Outlook profile
Password	Meeting Maker password for specific user name
Server	Meeting Maker Server Name
Web Service URL	IP address or DNS name to the Meeting Maker web service

Note: The logon values are case sensitive.

4 Click Verify.

The Logon Values Verified screen appears.

If an error message appears, you may have typed an invalid logon value. Retype the logon values or see your system administrator.

5 Click OK.

The Microsoft Outlook command bar may flicker as calendar sharing is enabled. Your Microsoft Outlook calendar information is copied onto the Meeting Maker server.

Starting Microsoft Outlook

After you enter the Meeting Maker logon values, the Meeting Maker features are available when you start Microsoft Outlook.

• Start Microsoft Outlook

The Microsoft Outlook Inbox appears.

• Microsoft Outlook is connected to the Meeting Maker Server.

Future calendar changes are copied to the Meeting Maker server at the specified synchronization schedule (see page 26).

Note: The first time you connect Outlook to the Meeting Maker Server, a large amount of data may be processed. This initial synchronization will take longer to perform than subsequent synchronizations.

Defining your Work Schedule

To maintain a current calendar across the network, and enable users to view your busy/free time, you must define your work schedule in the appropriate application *before* you create activities, as described below.

- Meeting Maker users: From the Meeting Maker Calendar menu, click Edit > User Info. Refer to the Meeting Maker Millennium User Guide for instructions.
- Microsoft Outlook users: From the Microsoft Outlook main menu, click Tools > Options > Calendar Options. Refer to the Microsoft Outlook documentation for instructions.

Uninstalling the Connector

1 Double-click the MMCO installation program.

The Outlook Connector Setup dialog box appears.

- 2 Make the desired selection, and click Next.
 - Modify Add, remove, and change configuration features
 - Repair Reinstall missing or corrupt files
 - Remove Uninstalls the application from your computer
- **3** Follow the on screen directions, and then click **Finish**.

Creating Activities

In MMCO, appointments, meeting requests, and all day events (banners) are called *Activities*. When you create an *activity proposal*, you can include Meeting Maker and Microsoft Outlook users.

Note: Before you create an activity, define your work schedule to support accurate calendar sharing (see page 10).

Identifying the Meeting Maker icons

Meeting Maker icons appear on the *Select Attendees and Resources*, *Scheduling*, and *Tracking* menus, next to the Microsoft Outlook icons. Meeting Maker icons represent Meeting Maker users, locations, and resources.

8	Required guest	2	CC guest
8	Optional guest	2	Group
8	BCC guest		Optional resource
	Required resource		Optional location
٩	External contact		Required location

Creating an Activity Proposal

1 Start Microsoft Outlook.

The Microsoft Outlook Inbox appears.

2 Click File, and then highlight New.

This screen appears.

🛿 Inbox - Microsoft	Outlook	
<u>File E</u> dit <u>V</u> iew Fav <u>o</u> ri	ites <u>T</u> ools <u>A</u> ctions <u>H</u> elp)
Ne <u>w</u>	🕨 😰 Mail Message	Ctrl+N
<u>O</u> pen Clos <u>e</u> All Items	Appointment	Ctrl+Shift+A
Save <u>A</u> s	∰ ² Meeting Reguest ☑ <u>T</u> ask	Ctrl+Shift+Q Ctrl+Shift+K

3 Click Appointment or Meeting Request.

The Meeting Maker Activity screen appears.

🛄 Untitled - Meeting Maker Activity	y	
] <u>F</u> ile <u>E</u> dit <u>V</u> iew <u>I</u> nsert F <u>o</u> rmat <u>T</u> ools <u>4</u>	Actions Help	
Save and Close 🛛 🕀 Recurrence	🐺 Invite Guests 🕴 😤 🛛 Arial	• 10 • 🔺 🐥
Appointment Scheduling		
Subject:		
Location:	✓ This is an online meeting using:	Microsoft NetMeeting
Start time: Thu 4/22/2004	▼ 9:30 AM ▼ F All day event	
End time: Thu 4/22/2004	▼ 10:00 AM ▼	
- Reminder: 15 minutes	⊕ € Show time as: Busy ▼	Ξī.

- 4 In the *Subject* field, type the topic.
- **5** In the *Location* field, type an entry or click the pull-down arrow to select a location.
 - **Note**: Selecting a location from the Meeting Maker Activity screen *does not* reserve a network resource. After you create the activity proposal, you can invite attendees and *reserve* network resources and locations from the *Select Attendees and Resources* menu as described on page 13.
- 6 In the *Start time* and *End time* fields, use the pull-down menus to select the day and times.

Selecting Attendees, Groups, and Resources

Invite attendees or a group of attendees, and reserve locations and resources for the event on a first-come, first-serve basis through the *Select Attendees and Resources* menu.

Meeting Maker Groups are defined by the Meeting Maker Administrator in the Meeting Maker Admin application.

1 From the Meeting Maker Activity screen, click Invite Guests.

The Select Attendees and Resources menu appears.

	Select Attendees and Resources		2	×
	Type name or select from list:	Sor <u>t</u> by:	Show names from:	
	Area	First Last	Meeting Maker Groups Meeting Maker Groups Meeting Maker Locations	Meeting Maker categories
Meeting Maker icons	 Area Directors IT Department Sales Team Northeast Sales Team Northwest Sales Team Southeast Sales Team Southeast Sales Team Southwest 		Meeting Maker Resources Outlook Contacts John Smith Video Projector - VP103 Steven Ingles	
		Optional ->		
		<u>B</u> CC - >		
		Remo <u>v</u> e		
		OK Cance	el	

- **Tip**: You can change the sort order of the list of Users, Locations, or resources by clicking on the **Sorting** menu option. The sort order is disabled when you select a group.
- 2 In the *Show names from:* field, click the pull-down arrow and highlight a category.

Category	Description
Meeting Maker Groups	Groups, as defined by the Meeting Maker Admin
Meeting Maker Locations	Locations, such as conference rooms
Meeting Maker Resources	Hardware, such as projectors and computers
Outlook Contacts	External contacts in your Microsoft Outlook address book

3 In the *type name or select from list* field, select the name and click the appropriate status button.

Status Button	Description
Required	Must attend
Optional	May attend

CC	Receives agenda publicly ¹
BCC	Receives agenda privately ¹

The item moves to the corresponding status window.

- 4 Repeat steps 0-3 to reserve additional attendees or resources.
- 5 Click OK.

Attendee and resource schedules are retrieved from the Meeting Maker server.

The Scheduling menu appears. This menu allows you to view attendee and resource availability (see page 15).

Unavailable resources

The Connector does not allow you to reserve an unavailable resource or invite a busy guest to a meeting. If you send a proposal with an unavailable resource or busy guest, an error message appears when you click OK to send the proposal. An email appears in your inbox stating that the meeting proposal did not get sent due to the conflict.

Attachments

Meeting Maker does not support attachments in the meeting agenda. Your guests will not be aware of an attachment if you send it through the meeting agenda.

Tip: Send the attachment in a separate email and reference the appropriate activity proposal.

¹ Available for Meeting Maker All Users category only.

The Scheduling Menu

The Scheduling menu enables you to view attendee, location, and resource availability *before you send the proposal*; modify the meeting time and dates; and add and remove attendees and resources.



Item	Description	
All Attendees	Shows invited attendees and resources.	
Add Others	Invites additional guests or reserve resources.	
Appointment bar	Highlights proposed meeting time. Drag either column right or left to redefine the meeting time.	
<< AutoPick Next >>	Moves the appointment bar to the previous or next available meeting time.	
Working hours only	Shows only working hours.	
Meeting start time	Redefines start time and day.	
Meeting end time	Redefines end time and day.	
Recurrence	Configures a reoccurring schedule (see page 24).	
Cancel Guests	Removes all guests from list.	
Color key	Shows availability status for each item.	
Zoom	Enlarge or minimize view.	

Viewing Attendee and Resource Availability

The Scheduling menu enables you to view attendee and resource availability before you send the activity proposal. For example, when you create the activity proposal and invite attendees, the schedules for each attendee and resource are retrieved from the Meeting Maker server and displayed on the Scheduling menu.

See page 15 for a description of the items on the Scheduling menu.

1 Create an activity (see page 11).

To open an existing activity, in Calendar view, right-click the activity and click Open.

The Appointment menu appears.

2 Click Scheduling.

The Scheduling menu appears (see page 15).

You can now view availability, modify the activity time, and add or remove attendees.

Note: Users in the *Outlook Contacts* category show *No Information* \mathbb{N} on the Scheduling menu because they are external users and their calendars are not stored on the Meeting Maker server.

Modifying activities

You can modify activities from the Scheduling menu. When you modify an existing activity, the new instance of the activity replaces the original instance on your calendar.

- If the change involves an external contact, an email addressed to the contact appears with an iCalendar attachment enclosed.
- Internal contacts receive an email in their inbox, indicating that the activity has been modified.
- **Note**: You can only change activities that you create. To suggest an alternate time for an activity proposal, use the *Include comments* box when accepting or declining the invitation (see page 20).

To change the activity time

1 Open the activity.

The Appointment menu appears.

2 Click Scheduling.

The Scheduling menu appears (see page 15).

3 In the *Meeting Start* and *End* time fields, click the pull down arrow to select the day and times. A mini calendar menu similar to this appears.

sta <u>r</u> t time:	5 /19	3/200	4		-	3:0	DO PM	÷
end time:	May 2004			04			:	
	25	Mon 26	Tue 27	<u>Wed</u> 28	29	30	1	
	2	3	4	5	6	7	8	_
	9	10	11	12	13	14	15	
	16	17	18	19	20	21	22	
	23	24	25	26	27	28	29	
	30	31	1	2	3	4	5	
	S	Tod	lay: !	5/3/	2004			

A red circle indicates the current day. A shaded circle indicates the activity date.

- 4 Click the desired date.
- **5** Click the appropriate pull-down menu to change the start or end time.
- 6 Click Resubmit Proposal.

To remove an attendee

- **1** Open the activity.
- 2 Click Scheduling.

The Scheduling menu appears (see page 15).

- 3 Click Add Others.
- 4 In the *Required* or *Optional* field, highlight the name you want to remove.
- **5** Press <Delete>, and click **OK**.
- **6** The name disappears from the Scheduling menu.

The meeting is removed from the attendee's calendar.

To add an attendee

- **1** Open the activity
- 2 Click Scheduling.

The Scheduling menu appears (see page 15).

- 3 Click Add Others.
- 4 In the *Show names from*: field, click the pull-down menu. The Meeting Maker category list appears (see page 13).
- 5 Highlight the category, select the name, and click the appropriate status button (see page 13).
- 6 Click OK.

Attendee schedules are retrieved.

7 Click Resubmit Proposal.

Submitting a Proposal

From the Meeting Maker Activity menu, click Submit Proposal.

Each attendee receives an email in their inbox. A meeting icon is placed on your calendar.

Note: If the invitation is to an external contact, an outgoing email addressed to the guest appears with an iCalendar icon enclosed (the iCalendar icon contains the meeting agenda). Click **Send** to submit the proposal.

The Tracking Menu

The Tracking tab appears on the Meeting Maker Activity menu after you send an activity proposal. Use the Tracking menu to monitor attendee response to your meeting and view any private comments sent from attendees.

View attendee responses

When an attendee responds to an activity request, an email appears in your inbox indicating that the attendee has responded to your proposal. You can open the email to view the response and then use the Tracking menu to monitor attendee response.

1 Open the activity in Calendar view.

The Meeting Maker Activity menu appears

2 Click Tracking.

This screen appears.

III r	eply from MM user - A	Aeeting Maker Activity		
File	<u>E</u> dit <u>V</u> iew Insert F <u>o</u> rn	at <u>T</u> ools <u>A</u> ctions <u>H</u> elp		
	Re <u>s</u> ubmit Proposal 🛛 🗍	🕂 Recyrrence 🛛 🕵 Cancel Meeting 🕴 🚦	♥ Arial • 10 • ♥	
Арр	ointment Scheduling	Tracking		
The	following responses to this	proposal have been received:		
	Name	Attendance	Response	
8	Carla Catalano	Meeting Organizer	Accepted	
2	Lily Li	Required	Accepted	
Cor	mments (select attendee to	view comments)		

View private comments

When a Meeting Maker user receives your proposal, he or she has the option of sending private comments to you. If private comments were included in the response, you can view the comments from the Tracking menu.

- **1** Open the activity in Calendar view.
- 2 Click Tracking.

The Tracking menu appears (as shown above).

3 Highlight the user name.

The user comments appear under the Comments field.

Responding to a Proposal

When you receive an activity proposal, an email appears in your Microsoft Outlook inbox. If the proposal is from a Meeting Maker user, you can send private comments included in your response, as described in the following section. If the proposal is from an external contact, see page 21.

To respond to a Meeting Maker proposal

1 Double-click the email. The proposal appears.

🧱 weekly re	- test2 - Meeting Maker Activity
Eile Edit	View Insert Format Tools Actions Help
🖌 🗸 A <u>c</u> cept	🍝 Acce <u>p</u> t 🗙 Decline 🛃 🔘 🕀 Recurrence 📍 🌷 🗙 🔺 👻
Appointment	Scheduling
Some instar	es of this recurring appointment conflict with other appointments on your Calendar.
Subject:	weekly rec - test2
Location:	moreloc22 linloc
	Moreloc22 linloc Occurs every Tuesday effective 10/4/2005 from 1:00 PM to 2:00 PM.
	Occurs every Tuesday effective 10/4/2005 from 1:00 PM to 2:00 PM.

- 2 Click one of these buttons: Accept, V, Accept with comments, V, or Decline, X.
 - Click **A<u>c</u>cept**, **V**, to accept the invitation without sending comments.
 - Click Accept with comments, 🔌, to accept and send comments to the activity originator.
 - Click **Decline**, X, to decline the invitation and send comments to the activity originator.

If you click **Accept** with comments, 4, or **Decline**, X, a Comments dialog appears.

Comments	×
Enter comments for the meeting proposer	<u>C</u> ontinue
1	A
	v

3 Type your comments, and then click **OK**.

Your comments appear on the Tracking menu of the activity originator.

To respond to an external proposal

- **1** Double-click the email in your Microsoft Outlook inbox. The email opens, with an iCalendar icon in the *Attach* field.
- Double-click the iCalendar icon.The meeting agenda opens.
- In the Agenda field, type your comments.Click **Reply** to respond to the proposal.

Configuring Activities

Basic activities include a topic, location, time, date, and attendees. You can further configure activities with these options available on the Meeting Maker Activity menu (see page 12):

- All day Event
- Show Time as
- Reminder
- Recurrence
- Online Meeting see Microsoft Outlook online help

Scheduling an All Day Event

All day events are activities that do not include attendees. Select *All day event* to schedule personal time on your calendar, such as vacations days, or paid time off.

- **1** Create or open an activity (page 12).
- 2 Select All day event.

The Invite Guests field is grayed out, indicating that you cannot invite guests to an all day event.

3 Click Save and Close.

The event appears on your calendar as a banner, as shown in the following example.

Jun	
C	Vacation Day
L	racadon b ay

Showing 'Time as'

When you create an activity on your calendar, you can specify how the time appears to others when they view your calendar.

- 1 Create or open an activity (page 12).
- 2 In the *Show time as* field, click the pull-down arrow.

This screen appears.

Sho <u>w</u> time as:	Busy
	Free Tentative
	Busy
	Out of Office

- **3** Highlight the status.
 - **Note**: Meeting Maker does not support *Tentative* or *Out of Office* status. If you select *Tentative* or *Out of Office* an error message appears indicating that *Tentative* appears as *Free* and *Out of Office* appears as *Busy* on your calendar.

Click **OK** to close the warning box.

- 4 Click Save and Close.
- **Tip**: You can open an existing activity to change the status at any time.

Setting A Reminder

- 1 Create or open an activity (page 12).
- 2 In the *Reminder* field, click the checkbox and click the pull-down arrow.

This screen appears.

- <u>()</u> - 🔽 <u>R</u> eminder:	15 minutes	-
	15 minutes	~
	30 minutes	
	1 hour	
	2 hours	
	3 hours	V

- **3** Highlight the desired time, and then click **Save and Close**.
 - **Note:** Reminders in Microsoft Outlook do not synchronize with the Meeting Maker server. You must configure reminders locally if you restore your system.

Scheduling a recurrent meeting

You can configure a meeting to recur at daily, weekly, monthly, and yearly intervals. When scheduling recurrent meetings, keep this information in mind:

- You cannot change or cancel individual instances in a recurring banner.
- You *can* change and cancel individual instances in a recurrent activity (where guests are invited). Meeting Maker guests are notified through email.
- **1** From the Activity menu, click **Recurrence**.

The Appointment Recurrence dialog box appears.

Appointment F	Recurrence 🔹 💽 🔀
Appointment ti Start: 12:00	
Recurrence pa C Daily C Weekly C Monthly C Yearly	ttern Regur every 1 week(s) on: ☐ Sunday ☐ Monday ☑ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday
Range of recur Start: Tue 5	rence ✓ ✓ ✓ No end date /11/2004 ✓ ✓ ✓ ✓ ✓ ✓ End after: 10 occurrences ✓ ✓ End by: Tue 7/13/2004 ✓
	OK Cancel <u>R</u> emove Recurrence

- 2 In the left panel of the *Recurrence pattern* field, select one of these items:
 - Daily
 - Weekly
 - Monthly
 - Yearly
- 3 In the right panel of the *Recurrence pattern* field, select the recurrence pattern.
- **Note:** Meeting Maker does not support some recurrence patterns (see page 31). An error message appears if a recurrence pattern is not supported.
- 4 In the Start field, click the pull-down arrow to select the start date.
- **5** Select the end date.
- 6 Click OK > Submit Proposal.

CHAPTER 5

Customizing Meeting Maker Options

Installing MMCO adds the Meeting Maker tab to the Microsoft Outlook Options menu.

1 In Microsoft Outlook, click **Tools > Options > Meeting Maker**.

The Meeting Maker tab appears.

Preferences Other	Mail Services Mail Format Spelling Security Internet E-mail Meeting Maker Meeting Maker® Version: 1.0.2153	The <i>Status</i> field ind system status.
User <u>N</u> ame Password Server Web Service <u>U</u> RL	Status: Online sam ***** webservices http://10.1.2.65:8080/axis/services/MM	
Synchronize caleno		
ή 		

Use the Meeting Maker menu to access and change your logon values, view system status, set the synchronization schedule, and view the error log. These procedures are described on pages 26-26.

Setting the Synchronization Schedule

Synchronization occurs when the Meeting Maker server checks the information in your Microsoft Outlook calendar against the version accessible to network users (on the Meeting Maker server). New calendar information is copied from your Microsoft Outlook calendar to the Meeting Maker server at the specified synchronization schedule. If a calendar conflict exists, check the Conflicts folder (see page 27).

1 In Microsoft Outlook, click Tools > Options > Meeting Maker.

The Meeting Maker menu appears (see page 25).

- 2 Navigate to the Synchronize calendar every field.
- 3 Click the up or down arrows to change the time interval from five to 30 minutes.
 - **Tip**: If you send and receive several activity requests daily, Meeting Maker recommends you keep the default time interval of five minutes. This sends all calendar changes and activity requests to and from your computer every five minutes.
- 4 Click OK.
- **Note:** The first time you connect Outlook to the Meeting Maker Server, a large amount of data may be processed. This initial synchronization will take longer to perform than subsequent synchronization

Viewing the Error Log

The error log summarizes synchronization results, such as when the last synchronization occurred, number of updated items since last synchronization, and any errors or conflicts.

1 Click Tools > Options > Meeting Maker > View Log.

The error report appears in text format.

- 2 Click OK.
 - Tip: Send a copy of the log to your system administrator for help resolving synchronization issues.

Changing the Server Name or Web Service URL

Your system administrator will advise you if you must switch to a different Meeting Maker server IP address or Web Service URL.

1 In Microsoft Outlook, click **Tools > Options > Meeting Maker**.

The Meeting Maker menu appears (see page 25).

- 2 In the Server field, type the Meeting Maker Server Name.
- 3 In the Web Service URL field, type the web service address.
- 4 Click Verify.

A dialog box indicates successful logon.

Note: If an error message appears, retype the values or see your system administrator.

5 Click OK, if logon is successful.

The Status field indicates Online.

Troubleshooting

Maintaining a Current Calendar

If two or more activities are scheduled on your calendar in the same time slot, then you have a calendar *conflict*. A conflict may occur in your schedule due to these situations:

- Since the last synchronization you changed an event in Microsoft Outlook, while a user with Meeting Maker proxy rights to your calendar changed the same meeting.
- Changes were made to your schedule while your computer was disconnected from the Meeting Maker server.
- You changed an event in Microsoft Outlook that Meeting Maker does not support.

Resolve calendar conflicts

If you receive a conflict error in your inbox, follow these steps:

- 1 In Microsoft Outlook, open the Calendar folder to view the current version of the event.
- 2 Open the Conflicts subfolder in a separate window.
- **3** Adjust the windows so you can view both versions of the activity, as shown in the following example.

Calendar	•			March 2004 -	- April 2004 🧐	Conflicts 🗸				
Mon	Tue	Wed	Thu	Fri	Sat/Sun 🔥	0 Subject	Location	Start 🕗	End 🛆	Recurrence C
March 8	9	10	11	12	13	Marketing Meeting	Location A	Fri 3/19/200	Fri 3/19/20	(none)
					14					
15	16	17	18	19 Marketing N	20	Event conflict				
				-	21					

- **4** Update your Calendar folder in either of these ways:
 - In the Calendar, type information manually, and then delete the Conflicts version.
 - Drag the conflicts version to your calendar, and click **Yes** to replace the calendar version.

The changes take effect upon resynchronization.

Synchronization Conflicts

A synchronization conflict occurs when an activity cannot move between the Meeting Maker server and your Microsoft Outlook calendar. A synchronization error message appears in your Microsoft Outlook inbox with a link to an error log. The error log summarizes synchronization results, such as when the last synchronization occurred, number of updated items, event title, date, and failure reason.

To view the error log

1 Navigate to your inbox and open the appropriate email.

A link to the error log appears.

2 Click on the link.

The error log appears in text format.

Automatic Data Recovery Mode

If the Meeting Maker server crashes it goes into automatic data recovery mode. During recovery, your current calendar information moves to the *Meeting Maker Backup* Folder. An email appears in your inbox with a link to the folder, as shown below. A *Meeting Maker Import Failure* email appears in your inbox if any activities are not imported.

Folder List	×
🚭 Outlook Today - [Personal Folders]	
😑 🧒 Calendar	
Conflicts	
Meeting Maker Backup Mar 19 :	2004

These situations cause the Meeting Maker server to go into automatic data recovery mode:

- Computer crashes and the Microsoft Outlook PST file is damaged
- Meeting Maker server crashes
- Meeting Maker server restored from previous backup
- User name change

Tips: Remember this important information regarding automatic recovery mode:

- If the Microsoft Outlook .pst file is corrupted, delete it and create a new one.
- During the first synchronization your Microsoft Outlook calendar is automatically restored from Meeting Maker. There is no Meeting Maker Backup folder because there is no existing data in the calendar.
- Your Microsoft Outlook calendar data is potentially out of synchronization because the server-generated values that identify each activity may have changed. To guarantee that Microsoft Outlook is synchronized, copy your calendar from Meeting Maker.
- The Meeting Maker data is current to the backup date. Any changes that you make after the backup date will be moved to the *Meeting* Maker *Backup* folder. Refer to the *Meeting* Maker *Backup* folder to manually recreate any missing entries that occurred after the backup date.

Offline Status

If your system is offline, an error message appears when you try to schedule an event, and the status indicator on the Meeting Maker menu states *Offline*. These situations prevent synchronization between the Meeting Maker and Microsoft Outlook:

- Invalid logon values
- Unavailable Meeting Maker server
- Unavailable Web server
- Disconnected network cable
- User working offline

Error Messages

Below is a list of error messages and a description of each error. You may wish to look at the log files to review what happened during synchronization. Technical Support may need these files to better see what occurred during synchronization.

Log files generated during synchronization:

- Documents and Settings/<profile name>/Application Data/Meeting Maker/Microsoft Outlook Internet Settings/MMSynch.log
- Documents and Settings/<profile name>/Local Settings/Temp/MMTrace.log

Error Message	Description
Meeting Maker Synchronization Errors	Synchronization errors between the Meeting Maker server and your client. Error message appears in your inbox with a link to the error log.
Meeting Maker Conflict Errors	One or more event changes occurred in both the Meeting Maker server and your client since the last synchronization. An error message appears with a list of the conflicting appointments and a link to the Conflicts folder
No Session	The Web service is unavailable. This message appears at system startup, synchronization, when retrieving guest busy time, and when submitting a proposal.
Conflicts with another appointment on your Calendar	Indicates a calendar conflict. This message appears, which enables you to propose a new time before sending the invitation.
Location or resource is unavailable. Send proposal anyway?	The Connector tracks the schedules of each resource and location to avoid potential overbooking. Once you click OK to select the desired resource (or location), the Connector retrieves guest and resource schedules. If a required guest, resource or location is busy, this error message appears.
Blocked recurrence from OL	Meeting Maker does not support the recurrence pattern.
Blocked recurrence from MM	An activity, banner or event exists in your Meeting Maker calendar that Microsoft Outlook does not support. A Synchronization Error appears in your Inbox. Change the recurrence pattern for this item to appear in your Microsoft Outlook calendar

Location is unavailable	The selected location is already booked by another user.
Meeting Maker does not support attachments	You cannot include attachments in the meeting agenda.
You cannot invite users to an all day event	All day events are reserved for personal days

Blocked Recurrence Patterns

This table describes recurrence patterns that do not synchronize with the Meeting Maker server.

Patterns blocked in Microsoft Outlook User Interface

Every *N* days where *N* > 109

Every *N* weeks where N > 36

Day *M* of every *N* months where N > 3

Monthly patterns that do not occur every month (i.e. every third month)

Weekly patterns that do not occur every week (i.e. every third week)

Yearly patterns that do not specify a specific day and month (i.e., the first Tuesday of June)

Unsupported patterns from Meeting Maker to Microsoft Outlook

Any weekend move rule

Day N from the end of the month

Every month on weeks where more than one week is specified (i.e., 1st, 2nd, 3rd, 4th, Last)

Monthly on day 29, 30 or 31

Usage Tips

Review this table. It contains tips for using MMCO effectively.

Feature	Тір
Attachments	Send attachments in a separate email, and not as part of the meeting agenda.
Add comments to meeting proposal	Add private comments from a pop-up dialog box when you respond to a meeting.
All day event	You cannot invite users to an all day event. Use event start and end times on the Activity menu to indicate event time span.
	Note : All day events created in Microsoft Outlook are imported as banners at initial synchronization.
Tentative time	Appears as free time on your calendar.
Out of Office time	Appears as <i>busy</i> time on your calendar.
Reserve locations and resources	Click Invite Attendees to reserve locations and resources from the Select Attendees and Resources menu. The Meeting Maker icon appears grayed out if item is unavailable during the selected time slot.

Synchronization Considerations

This table contains helpful information regarding synchronization with the Meeting Maker server.

Feature	Change		
<ctrl> Drag</ctrl>	Do not use to copy or move events in Calendar view. Open the meeting to change the time; configure the recurrence schedule to copy the event.		
Change recurrence schedule	You cannot change or delete one or more instances in a recurrent meeting. Open the meeting and change the recurrence schedule.		
Yearly recurrence	Select a specific date for the recurrent yearly meeting		
Change or cancel meeting	 Do not use <shift> Delete to cancel a meeting</shift> Do not drag a meeting to a different location 		
Change guest status	You cannot change guest status from Optional to BCC or CC. Delete and re-add guest with desired status to the attendee list		
Offline usage	Create, update, delete, and respond to meeting invitations while disconnected from the Meeting Maker server; reconnect to the server to synchronize changes.		
External contacts	Your external contacts are not shared between Meeting Maker and Microsoft Outlook.		