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1 INTRODUCTION

This document describes the processes and procedures for the Symphony User View of the Symphony Web Portal. Symphony includes both Symphony meetings and the Virtual Meeting Room (VMR) services provided by Cisco Meeting Server (CMS).

The intended audience is anyone using Symphony products; Managed Services Powered by Symphony, Symphony as a Service (SYaaS).

1.1 HOW TO USE THIS DOCUMENT

This document is designed for both online and hardcopy consumption. Please note hyperlinks may appear on a page which when clicked, reroute you to another topic, document or reference source. If you are reading a printed copy of the document, the underscored words are usually hyperlinks and should not be interpreted as items of emphasis. Conventions used in this document for emphasis are bold and italic.

1.1.1 Easy PDF Hyperlink Navigation

You can use hyperlinks to jump to a place in the document. To Go Back/Return from whence you came, use ALT + Left Arrow.

NOTE The left arrow cannot be on the number pad. Use the regular keyboard cursor key, left arrow.

1.2 REFERENCES

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<tr>
<th>References</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Symphony - Outlook</td>
<td>This document describes how the steps to install and utilize the Microsoft</td>
</tr>
<tr>
<td>Add-in Guide</td>
<td>Outlook Add-in with Symphony for Basic and Advanced Modes.</td>
</tr>
<tr>
<td></td>
<td>Contact AVI-SPL for a copy of this guide.</td>
</tr>
</tbody>
</table>

1.3 SYSTEM REQUIREMENTS

The Symphony portal can be accessed from any device with any operating system that supports one of these web browsers.

➢ Internet Explorer, Firefox, Google Chrome, Safari, Microsoft Edge

1.4 TERMINOLOGY

This section provides the terms and acronyms utilized in this document.
## Glossary of Terms

<table>
<thead>
<tr>
<th>Term or Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Hoc Meeting (VMR)</td>
<td>You can host unscheduled (or ad hoc) meetings in your VMR. See Hosting Ad hoc VMR Meetings section for information regarding the for launching and invites for an ad hoc meeting.</td>
</tr>
</tbody>
</table>
| Cisco Meeting Server (CMS) VMR | Cisco Meeting Server (CMS) is a VMR provider to Symphony. CMS integrates fully with Symphony which manages CMS as a multipoint control unit (MCU). The functions provided to users of CMS enabled accounts are similar to the Pexip enabled accounts:  
  • Auto provisioning of VMRs.  
  • Schedule a meeting in your CMS VMR from the web scheduler or the Symphony Outlook Add-In.  
  • Full moderation of CMS VMRs in the user and admin portals.  
    o Mute, Unmute, Disconnect remote attendees  
    o Invite participants  
    o Terminate meeting  
  Start and Stop recording |
| ICS File (Attached to meeting invites) | An ICS file is a calendar file saved in a universal calendar format used by several email and calendar programs, including Microsoft Outlook, Google Calendar, etc. It enables users to publish and share calendar information on the web and over email. ICS files are often used for sending meeting requests to other users, who can import the events into their own calendars. |
| LDAP | Lightweight Directory Access Protocol |
| MCU | Multipoint Control Unit |
| RMX | For AVI-SPL Symphony application, RMX refers to Polycom Multipoint Control Units (MCUs) used in video conferencing. This device should not be confused with Cisco Meeting Server (CMS) MCU also utilized at AVI-SPL. |
| URL | Uniform Resource Locator |
| VMR | A Virtual Meeting Room (VMR) is a self-service, cloud-based video conferencing service and meeting room that is always available and always accessible for ad hoc or scheduled meetings. |

### 1.5 WHAT’S NEW

There are no new features in Symphony Release 4.6 impacting the User View.
2 OVERVIEW

Symphony is a meeting solution platform that allows you to connect and conduct your meetings for workstream harmony.

With Symphony, you can automate your meeting scheduling, launching, monitoring, management, analytics, and experience using a single platform, giving you global control of your AV and Unified Communications (UC) ecosystem.

2.1 SYMPHONY VIRTUAL MEETING ROOMS (VMR)

A Virtual Meeting Room (VMR) is a self-service, cloud-based video conferencing service and meeting room always available and accessible for ad hoc or scheduled meetings.

If your company has purchased Symphony VMR Services, you may have a Virtual Meeting Room, (sometimes referred to as a Conference VMR or simply a Room). The following functions are available for VMR.

➢ Auto provisioning of VMRs.
➢ Schedule a meeting in your VMR from the web scheduler or the Symphony Outlook Add-In. Please refer to the Symphony - Outlook Add-in Guide for instructions.
➢ Full moderation of VMRs in the user and admin portals.
  ▪ Mute, Unmute, Disconnect remote attendees
  ▪ Invite participants
  ▪ Terminate meeting
  ▪ Start and Stop recording when you have purchased recording services
➢ One-click to join your VMR from the Symphony portal.
## 3 ACCESSING THE PORTAL

Your *System Administrator* provides the [URL](#) for the Symphony portal. Navigate to the URL in a web browser to access Symphony.

### Figure 1: Sign in to your account page for both Symphony and VMR Services

<table>
<thead>
<tr>
<th>If…</th>
<th>Proceed to…</th>
</tr>
</thead>
<tbody>
<tr>
<td>You are registering your own Symphony account</td>
<td><a href="#">Registering for a Symphony Account</a></td>
</tr>
<tr>
<td>The Administrator has created your Symphony account</td>
<td><a href="#">Signing in to Symphony</a></td>
</tr>
<tr>
<td>You have forgotten your password</td>
<td><a href="#">Resetting your Password</a></td>
</tr>
</tbody>
</table>
4 WORKING WITH SYMPHONY ACCOUNTS

This section covers instructions related to Symphony user accounts, including:

- Registering for a Symphony Account
- Signing in to Symphony
- Resetting your Password
- Changing Your Profile Information

4.1 REGISTERING FOR A SYMPHONY ACCOUNT

If your Administrator enabled the self-registration feature of Symphony, you can register for your Symphony account.

To register your own Symphony account, your corporate email address must be on your company’s primary corporate domain. For example, if your company’s primary domain is acme.com, only users with an email address @acme.com can register.

**NOTE** If your corporate email address is not on the company’s primary domain, contact your Administrator.

<table>
<thead>
<tr>
<th>If you have an email from...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Administrator</td>
<td>Click the link to access the Symphony portal. Proceed to Register Account Prompt.</td>
</tr>
<tr>
<td>The Symphony portal</td>
<td>Proceed to Register Account Details.</td>
</tr>
</tbody>
</table>

4.1.1 Register Account Prompt

1. Click the **Register Account** link below the **Sign-in to your account** area. You are prompted to enter your email address.

**NOTE** If you do not see the **Register Account** link, contact your Administrator to create an account for you.
2  Enter your **corporate email address** and click **OK**. Symphony performs a check on the domain.

3  Check your email for a message from Symphony with further instructions and check your spam folder if the message is not in your inbox.
4.1.2 Register Account Details

1. Click the link provided in the **Welcome email** to continue the registration process. The **Register your account** form opens.

   **Figure 3: Register your account screen (Profile)**

2. Complete your **Profile** information. Click **Next**.
   - You must enter your **email address** for extra security. When you perform your own account registration, enter the same email address as previously performed in registering your account. Your email address is your Symphony **user name**.
   - If you are NOT prompted to enter a **passcode**, your Administrator has activated the **LDAP** authentication option, and you use your standard domain password to sign in to Symphony.
4.1.3 Register Personal Conferencing

1 You can add your personal conferencing details when your company has personal conferencing services as shown below. If you do NOT have personal conferencing, proceed to register VMR.

Figure 4: Register your account screen (Personal Conferencing)

2 Click Next.

4.1.4 Register VMR (Virtual Meeting Room)

1 If your company is using Symphony for VMR Services, you can add your VMR settings; otherwise, proceed to complete registration.

2 Complete your VMR settings.
   - The VMR Address is the address you and your meeting participants use to connect to your VMR. This address is like an email address, with a 10-digit number followed by your VMR domain name. This address is assigned to you and cannot be changed.
   - Enter text in the VMR Alias box to create a personalized VMR address to use as an alternative to the assigned 10-digit number. The domain portion of the alias is provided for you. For example, you can use your first and last name or any name, (e.g. JaneDoe@xxxxx.com).
   - Passcode must be 5-digits, (i.e., numbers). Your account settings may require you to set a Passcode, which you enter when hosting a meeting (if you do not start the meeting from the Symphony portal). This same Passcode is utilized for your guests when joining the meeting.
   - You can keep the default View selection for registration. See Changing Your VMR Settings for more information on the View field choices.
NOTE You may receive a message when registering that you can only use VMR as a guest when registering.

4.1.5 Complete Registration

1 Click Register.
You are redirected to the Sign-in to your account page of the Symphony portal.

4.2 SIGNING IN TO SYMPHONY

You sign-in to Symphony using your account credentials (e.g., user name and password).

1 Navigate to your Symphony portal URL in a web browser. Contact your Administrator for the URL.
2 Click the login button at the top-right of the Connect page.
The Sign In to your account page displays.

Figure 5: Sign In to your Account Screen

3 Enter your email address in the Username box.
4 Enter your Symphony password in the Password box.
   ➢ If your Administrator has enabled LDAP authentication, enter your domain password.
   ➢ Otherwise, enter the password provided by the Administrator or the password you created during self-registration.

NOTE If you have forgotten your non-domain password, see Resetting your Password for information about creating a new password.

5 Click the Sign In button. Symphony displays the My Meetings page.
The left navigation area of the portal provides links to access views, based on the services your company has purchased:

- If you have purchased VMR Services, there are links to the Join Meeting and My Room pages.
- If you have purchased Recording Services, there is a link to the Recordings page.

### 4.2.1 Resetting your Password

If your implementation does not use LDAP authentication and you have forgotten your Symphony password, follow these steps to set a new password.

1. Click the Forgot Password link located at the bottom of the Sign in to your account page. You are prompted to enter your Username.
2. Enter your corporate email address and click OK.
3. Check your email for a message from Symphony with further instructions and check your spam folder if the message is not in your Inbox.
4. Click the link provided in the email and follow the instructions to reset your password.

### 4.3 SETTING YOUR PREFERENCES

You can use the Preferences link to:

- Update your profile and change your password
- Update your VMR settings
- Set the default way to join a VMR meeting

You can click your name in the top, right corner of the portal and click the Preferences link.

**Figure 6: Select Preference Link**

![Preferences Link]

### 4.3.1 Changing Your Profile Information

Your Symphony profile contains your name and contact information, as well as some location and other details. If any of this information changes, you can update your profile. If you are not using LDAP authentication, you can also change your password from your profile.
1. Open the *Preferences* page. The **Preference tabs** displayed depend on your Symphony services, (e.g., *Profile, Conferencing, My VMR, Settings*).

   **Figure 7: Preferences screen sample**

2. Modify the fields, as necessary.

   **NOTE** If you have *personal conferencing* enabled, you can select the **Conferencing** tab to view and update your options.

3. Perform the following actions to **change your password**:
a  Click **Change Password** button at the bottom of the *Preferences* page. The *Change Password* page opens.

b  Enter your *current password*. (The text is masked as you type).

c  Enter your *new password* twice.

d  Click **Change** to save the *new password* and return to the *Preferences* page.

4  Click **Save** to save your changes and return to the portal.

### 4.3.2 Changing Your VMR Settings

Set the attributes for your VMR using the VMR tab(s) on the *Preferences* page as shown below.

**NOTE**  The labels and options for the **My VMR** tab will differ depending on your provider.
Figure 8: My VMR Tab (Preferences)

Preferences

Profile | My VMR | Settings
---|---|---
Meeting ID: 1269433970
Video Address: Molly @mycospace.com...
Passcode:
View: Automatic

Copy to Clipboard

Molly Hatchet’s VMR Details:

VMR Number: 1269433970

Join from a laptop or smartphone
https://join.mycospace.com/

Join from a room system
To connect from a room system, use one of the dial strings below and follow the instructions on the screen. Based on your type of system and its capabilities, all or only some will work correctly.

Molly@mycospace.com
Alternatively, you can dial When prompted, enter 1269433970 followed by the # sign.

Join from a phone
Australia: +61 2 9038 0418
Brazil: +55 (0) (21) 3180-0104
Canada: +1 (416) 502-0847
France: +33 (0) 1 76 54 85 46
Germany: +49 (0) 6920.4575277
Japan: +81 (0) 3 4589 9452
LT: +888-111 2222
Singapore: +65 3157 1998
Spain: +34 91 217 84 82
UK: +44 (0) 20 3714 5511
US: +1 (646) 589-0074

When prompted, enter 1269433970 followed by the # sign.
4.3.2.1 VMR Field Definitions

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting ID</td>
<td>This field contains the address you and your meeting participants use to connect to your VMR. This address is like an email address, with a 10-digit number followed by the domain of your VMR portal. This address is assigned to you and cannot be changed.</td>
</tr>
<tr>
<td>(VMR Number)</td>
<td></td>
</tr>
<tr>
<td>Video Meeting</td>
<td>This field contains a personalized VMR address to use as an alternative to the assigned 10-digit number. The domain portion of the alias is provided for you. For example; <a href="mailto:JaneDoe@acme.com">JaneDoe@acme.com</a></td>
</tr>
</tbody>
</table>
| Passcode            | This field contains a 5-digit number you and your guests enter when hosting a meeting. There is no concept of Host PIN in Cisco Meeting Server (CMS). Everyone joins as guests.  

**NOTE:** If you start your meeting by logging on to the Symphony portal and opening your VMR, it is not necessary to enter the Host PIN. |
| View                | Please refer to Screen Layouts (View Field Options) section.                                                                                   |

When you schedule a VMR meeting in the Symphony portal, Symphony automatically adds the VMR Address, Passcode (if any), and any other connection information to the meeting invitation sent to invitees.

If you schedule a VMR meeting from your email program, click Copy to Clipboard to copy the text in the box at the bottom of the tab and paste into your meeting invitation.
4.3.2.2 Screen Layouts (View Field Options)
For a VMR (My Room), you specify one View for the host and all participants.

1 Use the drop-down arrow to change the view for meetings in a VMR. The View field contains the options shown below on the My VMR tab. See subsequent table examples of screen layouts views.

Figure 9: VMR Preferences (View Field Option) screen

The following table shows examples of the various view options available from Symphony. Please see screen layouts for SIP endpoints for a complete description of the SIP endpoint layouts.

<table>
<thead>
<tr>
<th>Screen Layout</th>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>One of the other options below is selected automatically based on the number of participants.</td>
<td>Automatic</td>
</tr>
<tr>
<td></td>
<td>Telepresence</td>
</tr>
</tbody>
</table>
### View Field Options (Examples)

<table>
<thead>
<tr>
<th>Screen Layout</th>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stack</td>
<td></td>
</tr>
<tr>
<td>Speaker Only</td>
<td></td>
</tr>
<tr>
<td>All Equal</td>
<td></td>
</tr>
<tr>
<td>All Equal Quarters</td>
<td></td>
</tr>
<tr>
<td>All Equal Ninths</td>
<td></td>
</tr>
</tbody>
</table>
### View Field Options (Examples)

<table>
<thead>
<tr>
<th>Screen Layout</th>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Screen Layout Image" /></td>
<td>All Equal Sixteenths</td>
</tr>
<tr>
<td><img src="image2" alt="Screen Layout Image" /></td>
<td>All Equal Twenty Fifths</td>
</tr>
<tr>
<td><img src="image3" alt="Screen Layout Image" /></td>
<td>One Plus Five</td>
</tr>
<tr>
<td><img src="image4" alt="Screen Layout Image" /></td>
<td>One Plus Nine</td>
</tr>
</tbody>
</table>

One large active speaker video with 9 smaller videos below.
4.3.3 Setting the Default Way to Join a VMR Meeting

When you use the Symphony portal to join a VMR meeting (as a Host or Guest), you have four applications options using the Preferences panel, Settings tab.

1. Open the Preferences page and click the Settings tab.

![Figure 10: Settings Tab](image)

<table>
<thead>
<tr>
<th>If you choose...</th>
<th>Then the meeting opens in...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Browser (WebRTC)</td>
<td>A web application in another browser window or tab.</td>
</tr>
<tr>
<td>Registered SIP App</td>
<td>This is the app you have on your PC or Mac which is registered to handle SIP calls. In other words, the app which launches when you enter sip://123 on your web browser.</td>
</tr>
<tr>
<td>Room endpoint</td>
<td>A device configured as an endpoint for Symphony meetings. If you have a personal endpoint (in your office or a room reserved for your use), you can have the VMR meeting automatically open on the device, rather than on your computer.</td>
</tr>
</tbody>
</table>

Hint: Long click on the join button allows you to select the way you want to join a meeting.
2  Select the option you want to set.
   If you select **Room endpoint**, enter the dial string for the device in the text box. The dial string can be an IP address, E.164, SIP URI, or, in case of an SBC, E164@IP or E164###IP.

3  Click **Save** to save your choice and return to the portal.

**NOTE**  You must log on to the portal before _joining_ the meeting to affect the _Settings_ option. 

You can override the _Setting_ option for a specific meeting. See [Joining a VMR Meeting](#) for more information.
5 VIEWING YOUR MEETING SCHEDULE

The My Meetings page displays a calendar that contains all the meetings you have scheduled or meetings to which you have been invited. There are four view options in the calendar view: Month, Week, Day, and Upcoming.

The color of the meeting objects in the calendar depends on the purpose of the meeting. A legend for the colors can be displayed in the left navigation area (see the images in the Calendar Views section).

Use the Filter Options to configure the default calendar view, whether to display only your meetings or all meetings for your company, and whether to display the legend.

Click on a meeting object to view the details for the meeting. If you scheduled the meeting or were set as the owner of the meeting by the scheduler, you can also edit the meeting after opening the details.
5.1 CALENDAR VIEWS

You can switch between the calendar views using the Month, Week, Day, and Upcoming buttons above the calendar.

Figure 11: My Meetings - Calendar Month View
Figure 12: Calendar Week View
Figure 13: Calendar Day View
The **Upcoming** view shows meetings for the current week in a list.

**Figure 14: Calendar Upcoming Meetings View**
5.2 FILTER OPTIONS

You can use the Filters dialog to set whether to show only your meetings or all meetings for your company, set the default calendar view, and show or hide the legend.

NOTE You may have to scroll down on the Symphony left navigation pane to view the legend.

1. Click the Filters icon above the Day view button. The Filters dialog displays.

   Figure 15: Calendar Filter Options

2. Select whether to show only meetings you created and meetings to which you are invited - or - all meetings for your company.

3. Select an option for the Default Calendar View.

4. Select whether to show the legend.

5. Click Reset to set the options back to the defaults shown in the image above.

6. Click OK to save your changes.
6 WORKING WITH MEETINGS

If your company has purchased Symphony Services, you can schedule a Symphony meeting. If you have a VMR, you can schedule a VMR meeting.

In this release, you cannot schedule a single meeting with both Symphony and VMR services.

This section describes how to schedule a Symphony or VMR meeting, as well as how to join a meeting.

➢ Scheduling a Symphony Meeting (without VMR)
➢ Scheduling a VMR Meeting
➢ Joining a Meeting

Figure 16: Symphony User Navigation Bar (All Symphony Services)

6.1 SCHEDULING MEETINGS

6.1.1 Scheduling a Symphony Meeting

When scheduling a meeting, you specify the following:

➢ Appointment details, including participants, subject and description of the meeting, date and time details, and whether it is a recurring meeting.
➢ Conferencing details, including whether participants can join by phone and any conference rooms booked for the meeting.
➢ Advanced options related to how Symphony processes the meeting setup, as well as whether the meeting will be recorded or streamed.

NOTE If your Administrator has opted not to expose the Advanced tab of the Schedule a Symphony Meeting page, you see the Appointment and Conferencing tabs only.
Click the Meeting button on the My Meetings page. The Schedule a Symphony Meeting page opens, showing the Appointment tab.

### 6.1.1.1 Appointment Tab

**Figure 17: Web Scheduler Appointment Tab**

Specify the Appointment details.

a. If you are authorized to create meetings for other users, you can select another user in the On behalf of list.

   This field defaults to you. If you cannot create meetings for others, this field does not appear.

b. Select the address book icon in the Participants field to browse for and select the people to send an email notification for this meeting. The address book contains all Symphony users at your company.

   To invite people who are NOT Symphony users or are NOT from your company, enter email addresses separated by commas.

c. Enter the topic of the meeting in the Subject field.

   The Subject is used to identify the meeting for the meeting invitation email subject, on the My Meetings page, and on the Recordings page (if the meeting is recorded).

d. Use the date and time picker controls in the Starts and Ends fields to specify the start date, start time, end date, and end time for the meeting.
The **Duration** field shows the calculated meeting duration. Alternatively, set the start date and time and select a **Duration**, and Symphony calculates the end date and time.

e  Enter the *number of minutes to allow for call set up* in the **Setup time (mins)** field. For example, a meeting scheduled to start at 10:00 AM with a setup time set to 15 is created at 9:45 AM.

f  Select the time zone to use for the meeting times in the **Time** list. This field defaults to the time zone configured in your [profile](#).

g  Enter the agenda of the meeting in the **Description** field.

2  Specify the **recurrence details**, if necessary:

a  Click the **recurring** icon next to the **Duration** field and select desired option in the dropdown list.

A line summarizing the recurrence is inserted between the setup time / duration and the time zone fields.

**Figure 18: Recurring Meeting Display**

![Recurrence](image)

b  Select the **Edit** link to set an end to the recurrence or change the recurrence pattern.
The *Recurrence* dialog opens. This dialog also opens when you select **custom** in the *Recurring* drop-down list.

**Figure 19: Recurring Meeting (Custom)**

![](image)

c Specify any changes and click **OK**.
6.1.1.2 Conferencing Tab

1. Click the Conferencing tab.

   The start and end date/time and any recurrence information are repeated in this tab for your convenience. You can use these fields to quickly change the meeting time.

   Figure 20: Web Scheduler Conferencing Tab

2. Select the meeting Options.
   
   a. Select the Participants can join by phone check box to have Symphony include the dial-in information for the audio bridge in the meeting email invitation.

   b. Select the Participants can join from a web browser or smartphone check box to have Symphony include the web link in the meeting email invitation.

      NOTE: This check box is only available if your company has purchased Bridging Services.

   c. Select the Record Meeting check box to specify you would like this meeting to be recorded.

      Recorded meetings are available on the Recordings page (see Working with Meeting Recordings for more information).
NOTE This checkbox is only available if your company has purchased Recording Services and recording is enabled on your user account.

6.1.1.2.1 Add Room (using the Picker)

1. Click **Add Room** to identify and add one or more physical rooms to the meeting. The **Add Room Picker** displays the **Directory** tab.

   **Figure 21: Add Room using the Picker (Directory Tab)**

   The left side of the picker lists all rooms to which you have access (organized by location on the **Directory** tab). The **Selected Rooms** area at the right lists the rooms that can be invited to your meeting.

   The **Exclude external rooms** checkbox allows you to restrict the rooms displayed in the directory to **Managed Rooms** only. Use the information in the following table to find and select the rooms to invite.

   **NOTE** Your administrator can set a room as **Managed** or not managed.
<table>
<thead>
<tr>
<th>Goal</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search for a location</td>
<td>Enter a few letters from the location you are looking for in the <strong>Search</strong> field and press <strong>ENTER</strong> to show matching rooms on the <strong>Directory</strong> tab.</td>
</tr>
<tr>
<td>Invite a room to the meeting</td>
<td>Click the blue plus (+) icon on the room in the list on the left. The room is moved to the list on the right and will be invited to the meeting.</td>
</tr>
<tr>
<td>Mark a room as a Favorite</td>
<td>Click the heart icon to mark a room as Favorite (displayed on the <strong>Favorites</strong> tab). If a room is already a Favorite, click the heart icon again to remove it from the Favorites list.</td>
</tr>
<tr>
<td>Access Favorite rooms</td>
<td>Click the <strong>Favorites</strong> tab to show all rooms that are marked as favorites.</td>
</tr>
<tr>
<td>Access Recent rooms</td>
<td>Click the <strong>Recent</strong> tab to show rooms you have invited to meetings recently.</td>
</tr>
<tr>
<td>Automatically invite the room device to the meeting</td>
<td>Select the <strong>Automatically connect the device to the meeting</strong> check box to have Symphony automatically dial the device at meeting time. Otherwise, someone must manually dial the device at meeting time.</td>
</tr>
<tr>
<td>Remove a room from the meeting</td>
<td>Click the blue minus (-) icon in the list on the right to remove the room.</td>
</tr>
</tbody>
</table>

**NOTE** If the room is not in the **Directory**, **Favorites**, or **Recent** lists, see **Inviting a Room that is not in the Directory** for the steps to add the room.

2. Click **OK** when you finish adding all the rooms you want to invite to your meeting. All selected rooms are displayed in the scheduler window, showing free/busy information for each room, as shown in the following figure.
Adjust the date and time of the meeting or remove and add rooms, as necessary, to resolve any availability conflicts.
6.1.1.3 Advanced Tab

1. Click the **Advanced** tab (if available) to specify advanced options for the meeting. If the **Advanced** tab is not available, proceed to **Send Invitation**.

Figure 23: Web Scheduler Advanced Tab (Typical Preferred Conference Layouts)
When your account is configured using RMX MCU(s), the RMX Framing Tool displays instead of the typical Preferred Conference Layout options.

Figure 24: Web Scheduler Advanced Tab (RMX Framing Tool)

2. Set the **Conferencing Options**:
   a. Select the MCU (Multipoint Control Unit) to host the call in the **Host MCU** list (if several options are available).
      The default is **Automatic**, where Symphony picks the best MCU for you at the time of the meeting.

   b. Select an option in the **Meeting Setup** list to specify whether:
      - You want Symphony to create the meeting automatically and invite all the rooms (when **Automatically connect the device to the meeting** check box is selected) **-OR-**
      - You want to connect devices manually. The default is **Automatic**.

   c. Select the **Send email invitations to all participants** check box to have Symphony automatically send an email containing the relevant connection information and an **ICS attachment**, (i.e., calendar attachment file), to all participants. The attachment allows users to add this meeting to their favorite calendar application.
      If the checkbox is not selected, participants do not receive any communication about this meeting.

   d. Select the **Reserve additional ports** check box to reserve additional ports on the MCU to host the call. Next, specify the **number** of additional ports to reserve.
3. In the **Optional Services** area, select the **Request Producer Attendance** check box to request a producer to attend this meeting. Next select, the producer attendance for the meeting; Next, select:

- **Full Attendance** for the entire duration
- **Greet Participants** to only greet attendees and ensure their connectivity
- **Monitor Connections** to ensure the connectivity throughout the meeting is working properly.

4. In the **Preferred Conference Layout** area, select a video layout you want to use for your meeting. By default, Symphony uses the default layout configured in the MCU profile.

Choose **Automatic** to let the MCU create a layout that automatically adapts to the number of participants.

When your account is configured using RMX MCU(s), you see the **RMX Framing Tool** instead of the typical **Preferred Conference Layout** options. See the **RMX (MCU) Framing Tool** section for instructions regarding this tool.

5. If you selected the **Participants can join by phone** check box on the **Conferencing** tab, specify the **Advanced Audio Conferencing Options**:

<table>
<thead>
<tr>
<th>If you set the Service Name to…</th>
<th>Then…</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>There are no other options to set. Participants could join the meeting via an audio bridge manually connected to the conference. This action constitutes additional service.</td>
</tr>
<tr>
<td>A Service (preconfigured)</td>
<td>If there is an audio bridge configured (for PSTN only), the account configuration is performed AVI-SPL. <strong>NOTE</strong>: Use this option for a PSTN gateway. For an ISDN gateway, add the ISDN endpoint to the meeting, as described in <strong>Inviting a Room NOT listed in the Directory</strong>.</td>
</tr>
</tbody>
</table>

The **Service Type** is set to **Shared Pool Conferencing**. Select **Automatic** or **Manual** in the **Audio Conference** list.
6. Proceed to **Send Invitation**.

### 6.1.1.3.1 RMX (MCU) Framing Tool

This section describes how to utilize the **RMX Framing Tool** when your account is configured to utilize **RMX (MCU)**. The device conferencing layouts can be defined when you **schedule a meeting**, OR you can **change layouts during a Live meeting** (based on your Admin permissions).

When scheduling an RMX meeting, you can specify **a room** and/or a **custom endpoint** not in the directory to set the corresponding framing layout preference. You can:

- Set participating devices to have differing preferred conference framing layouts. Each device (video endpoint) participating in the conference can have differing views.
- Pin the participants (e.g., devices) to a specific spot (square) on each layout.
1. From the Web Scheduler Advanced Tab, select the RMX Framing Tool button from the Preferred Conference Layout options. The RMX Framing Tool displays as shown.

   **Figure 25: RMX Framing Tool**

   ![RMX Framing Tool Image](image)

2. The **Meeting Default** video layout is inherited from the MCU and used by the default view for all endpoints on the left when hosting the conference. You can:
   - Do nothing and use the **Meeting Default** for all endpoints.
   - Or, click the **Meeting Default** and to set a different layout to be shared by all endpoints listed (left side of screen).
   - Or, you can set a different layout for a **specific endpoint** by clicking the endpoint (left side of screen).
   - Or, set both the **Meeting Default** and **specific endpoint** layouts.

3. In the **Layout Geometry** section, click and drag the slider and select a layout preference as shown in the figure below.

   **NOTE**  The 5 x 4 flex layout is unavailable for RMX MCU. When RMX receives an unsupported layout, the default layout is 1x1.

   ![Layout Geometry Image](image)
4 In the **Layout Pinning** section, use the drop-down arrow for each layout you wish to pin to a particular spot on the endpoint layout. You can select from these values:

- A **specific meeting endpoint** to pin in the spot for the meeting,
- **Auto** uses the RMX default to populate the pin spot,
- **Blank** shows nothing in the pin spot.

5 When you have completed all settings and pinning, press **OK**.

6.1.1.4 **Send Invitation**

1 After setting all meeting tab options, click **Send** to schedule the meeting.

Symphony emails meeting invitations and displays a *Meeting Confirmation* dialog with the *meeting ID*. Click **OK**.
6.1.2 Inviting a Room that is NOT in the Directory

If the room you want to add to your meeting is not in the Directory, Favorites, or Recent lists in the Picker (Rooms & Endpoints), you can add it using the Other tab.

1. Click the Other tab at the bottom of the screen.

Figure 27: Picker (Other Endpoints)

2. Enter the Site Name for the room.
   The Site Name is used to identify the room to invitees and on the Favorites and Recent tabs.

3. Select H.323 or SIP (Session Initiation Protocol) in the Protocol list.

4. Enter the Address to dial. The dial string can be an IP address, E.164, SIP URI, or, in case of a Session Border Controller (SBC), E164@IP or E164###IP.

5. Click the heart button to add it to the Favorites list, if you will reuse this room in the future.

6. Click the + plus button to add the room to the meeting.

**NOTE** The Exclude external rooms check box does not apply for the Other tab, (i.e., only used for the Directory Tab).
6.1.3 Scheduling a VMR Meeting

Scheduling a VMR meeting is very similar to a Symphony meeting, with the following differences:

➢ You cannot schedule a VMR meeting on someone else’s behalf - you must use your VMR, and you are the host.
➢ By default, your VMR is assigned to any meeting you schedule and designate as a Recorded Meeting. The VMR URL display on the email invitation.
➢ If you have conference rooms set up in Symphony, you can add one or more rooms to the meeting. However, this action simply reserves the room for the time of the meeting, (i.e., no conferencing equipment is engaged or monitored by Symphony).

Follow the steps for Scheduling a Meeting.

6.2 JOINING MEETINGS

When you schedule a meeting, Symphony emails meeting invitations with an ICS attachment (i.e., calendar attachment file), that the recipient can use to add the meeting in the calendar of their email application.

6.2.1 Joining a Symphony Meeting

Unless joining via an audio bridge, participants simply enter one of the rooms assigned to the meeting.

➢ If the meeting was configured to automatically connect to each room, the meeting automatically starts.
➢ If the meeting was not configured, someone in the room uses the room’s equipment to connect to the meeting.

If the meeting is configured to allow participants to join by phone, a participant can use the audio bridge information in the meeting invitation to dial in to the meeting.

6.2.2 Joining a VMR Meeting

Participants use the Click to join now link and Meeting ID in the invitation email to join the meeting.

6.2.2.1 Join a VMR meeting as a Participant (Symphony user)

1 Sign in to your Symphony account. If you do not have an account, proceed to the steps for non-Symphony users).

Symphony displays your name in the Join Meeting dialog. If you have upcoming meetings scheduled within Symphony, the meetings are displayed below the Join Meeting dialog.
2 Click Join the meeting when the meeting you want to join is listed. Otherwise, enter the Meeting ID from the invitation and click Join Meeting.

Symphony connects to the meeting using the default you have set for how to join the meeting. (See Setting the Default Way to Join a VMR Meeting.)

**NOTE** You can override your default setting for the current meeting by clicking and holding the Join or Join Meeting button and selecting a different option from the menu that appears.

3 Enter the PIN from the invitation, if prompted.

### 6.2.3 Join a VMR meeting as a Participant (non-Symphony user)

1 Open the meeting invitation and click the Click to join now link.

**Figure 29: Meeting Invite Email - Click to Join Link**

Join from a laptop or smartphone

Click to join now

2 Enter your name and click Join Meeting as a guest. Symphony opens the Cisco Meeting Server (CMS) Join Meeting page in a browser window.

**NOTE** When joining a VMR from the invitation, the passcode is already included, (i.e., you do not have to enter passcode).
The *Preflight* screen displays for you to adjust camera, microphone and speakers. You can also elect to *use this computer, use my video system, launch the desktop app*, or perform *management and presentation* by clicking on the tabs (top of screen). Click **Join Meeting** to join the VMR.

**Figure 31: Cisco (CMS) Pre-flight Screen**

You have joined the VMR. Use the information icon on the right navigation bar to view various options available as shown below.
6.2.4 Hosting a VMR Meeting

If you are hosting a VMR meeting, you can join the meeting by logging in to the portal and opening the VMR. Symphony connects to the meeting using your default setting, see Setting the Default Way to Join a VMR Meeting.

Participants can join at any point after the beginning of the Setup time configured in the meeting. If the meeting is configured to be recorded, Symphony starts recording automatically.
6.2.4.1  My Room Option

Once you have started the meeting, you can use the My Room page to access controls for the meeting. The controls are self-explanatory. Hover over a participant name to view the microphone and terminate participant controls, see figure below.

![My Room Option Screen](image)

**Figure 34: My Room Option Screen**

- **NOTE** During recording, a Pause icon appears next to the start/stop icon. You can manually stop or pause manual or automatic recording.

- If you end a scheduled meeting early, Symphony stops recording when the meeting ends.

6.2.5  Hosting Ad Hoc VMR Meetings

You can also host unscheduled (or ad hoc) meetings in your VMR.

1. Log on to the Symphony portal.
2. Join your VMR by accessing the My Room option in the portal.

**Figure 35: Hosting Ad Hoc Meeting - Invite Participant**

- Enter either a SIP or H323 address of the person you want to invite in the Address box. Click Send.
7 WORKING WITH MEETING RECORDINGS

When you record a meeting with Symphony, you receive an email when the recording is available. You can use the Recordings page to publish recordings of your meetings and to view recordings that others in your company have published.

By default, the meeting Owner is the Recording Owner. When you have scheduled a recorded meeting and assigned a Producer to the meeting, the Producer can optionally assign the Recording Owner to be a Producer. This feature can be utilized to create recordings organized and distributed by the Producer instead of the meeting Owner.

7.1 ABOUT THE RECORDINGS PAGE

The Recordings page shows a grid of meeting recordings, with the most recent recording at the top.

Figure 36: Recordings Option Screen
### Recording Definitions

| Recording Names | • For recordings of scheduled Symphony or VMR meetings, defaults to the Subject of the meeting.  
• For ad hoc VMR meetings, defaults to `<company name> `<user name>`.  
• You can modify the recording Name in the Recording Details. |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Play</td>
<td>Click the preview graphic 🎧 above the recording date and time to play the recording. The recording launches in a separate Symphony browser window.</td>
</tr>
<tr>
<td>Unpublished indicator</td>
<td>A lock (🔒) icon in front of the recording name indicates the recording is unpublished.</td>
</tr>
<tr>
<td>Refresh</td>
<td>If you recently recorded a meeting and do not see it yet, click the Refresh icon to update the page.</td>
</tr>
<tr>
<td>Filter</td>
<td>Click the filter icon 🏛️ to view the recordings available. By default, the page shows all the recordings you have made (both published and unpublished), as well as any published recordings other users in your company have made available to you. (See Publishing Recordings for more information).</td>
</tr>
<tr>
<td>Search</td>
<td>The owner of a recording can specify one or more Tags or keywords in the Recording Details. You can use the search box to display only recordings that use a specific Tag. See next section.</td>
</tr>
</tbody>
</table>

#### 7.1.1 About Recording Tags

When you use the Search box to search for recordings with specific tags, Symphony uses the following rules.

- Symphony only searches the Tags set for the recording. Symphony does not search in the recording Name or Description.
- The search is case sensitive (i.e., Project Status is not equal to project status).
- For multi-word Tags, all words must match: searching for Project does not find recordings with the Tag Project Status.

**Best Practice**

Create tagging conventions for your team or company. For example, you might want users to only use lowercase, or to enter all tags twice (once with mixed case and once in all lowercase), or to only use single-word tags.

Whatever conventions you decide on, the important thing is to communicate the conventions among your Symphony users, so the conventions are applied consistently.

#### 7.2 Modifying Recording Details

You can change the recording Name, add a Description, and enter search Tags for your recordings in the Recording Details.
7.2.1 Set Recording Properties

1. Click the **ellipses** button next to the recording **Name** to open the **Recording Details** dialog box.

   *The ellipsis button only appears for your recordings.*

**Figure 37: Recording Details Screen**

2. If necessary, modify the **Name** to make the recording easily identifiable to yourself and other users on the **Recordings** page.

3. Enter a **Description** of the recording.

4. Enter a word or words in the **Tag** box and click the **tag** button (see About Recording **Tags**).

   *Symphony adds the word(s) as a Tag that you and other users can use to search for this recording.*

   *You can add additional tags or click the x in a Tag to delete it.*

5. Click **OK** to save the changes.

7.3 Publishing Recordings

When you publish a recording, the settings you select in the lower half of the **Recording Details** dialog box determine who can access the published recording and how. There are these ways you can make the recording available to others.

- You can make the recording available to Symphony users by publishing it with settings
that make it appear on the Recordings page when users are logged in. These users can click the recording to play it.

- You can offer people the Direct URL of the recording as shown below, (i.e., click Copy to Clipboard and paste it in an email; include any PIN you have set). People can click the URL to play the recording.

**Figure 38: Publish Recording Example Screen**

<table>
<thead>
<tr>
<th>Settings...</th>
<th>Result...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publish this recording</td>
<td>The recording appears on the Recordings page for all Symphony users who are connected to your company account (this may include users not in your company). Users can click to play. Anyone you send the Direct URL of the recording can play it by clicking the link.</td>
</tr>
</tbody>
</table>
### Working with Meeting Recordings

<table>
<thead>
<tr>
<th>Settings…</th>
<th>Result…</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="https://via.placeholder.com/150" alt="Recording settings" /></td>
<td>The recording appears on the <strong>Recordings</strong> page for all Symphony users who are connected to your company account. Users are prompted to enter the PIN when they click to play. Anyone you send the <strong>Direct URL</strong> of the recording can play it by clicking the URL link and entering the PIN.</td>
</tr>
<tr>
<td><img src="https://via.placeholder.com/150" alt="Recording settings" /></td>
<td>The recording appears on the <strong>Recordings</strong> page for all Symphony users in your company. Users can click to play. If you send the <strong>Direct URL</strong> to someone, Symphony forces the person to log on ensuring the person is from your company before playing the recording.</td>
</tr>
<tr>
<td><img src="https://via.placeholder.com/150" alt="Recording settings" /></td>
<td>The recording does not appear on the <strong>Recordings</strong> page (except yours). Anyone you send the <strong>Direct URL</strong> of the recording can play it by clicking the link.</td>
</tr>
<tr>
<td><img src="https://via.placeholder.com/150" alt="Recording settings" /></td>
<td>The recording does not appear on the <strong>Recordings</strong> page (except yours). Anyone you send the <strong>Direct URL</strong> of the recording can play it by clicking the link and entering the PIN.</td>
</tr>
</tbody>
</table>
The recording does not appear on the Recordings page (except yours).

If you send the Direct URL to someone, Symphony forces the person to log on ensuring the person is from your company before playing the recording.

<table>
<thead>
<tr>
<th>Settings…</th>
<th>Result…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publish this recording</td>
<td></td>
</tr>
<tr>
<td>Only users from Pierce LLC can see this recording</td>
<td></td>
</tr>
<tr>
<td>Do not list this recording in the portal (users need the Direct URL to access it)</td>
<td></td>
</tr>
<tr>
<td>Protect access with a PIN:</td>
<td>The recording does not appear on the Recordings page (except yours). If you send the Direct URL to someone, Symphony forces the person to log on ensuring the person is from your company before playing the recording.</td>
</tr>
</tbody>
</table>

| Publish this recording |
| Only users from Pierce LLC can see this recording |
| Do not list this recording in the portal (users need the Direct URL to access it) |
| Protect access with a PIN: 123456 |

7.3.1 Publish a Meeting Recording

1. Click the ellipsis button next to the recording Name to open the Recording Details dialog box.
2. Modify the Name and add Tags to allow others to easily find and identify the recording (see Modifying Recording Details).
3. Select the Publish this recording check box. The other fields under the check box are made available.
4. Set the publishing options as desired (refer to the Record Settings table to determine what options you want to select).
   A PIN must be numeric and can contain any number of digits.
5. If you want to send someone the Direct URL, click Copy to Clipboard and then paste the URL into an email. Remember to include the PIN, if any, in the email.
6. Click OK to publish the recording.

If you no longer want others to be able to play the recording, you can permanently remove it from the system (see Deleting a Recording) or unpublish it. The unpublished recording is still available on your Recordings page, but no one else can play it, even if they have the Direct URL.

7.3.2 Unpublish a Recording

1. Click the ellipsis button next to the recording Name to open the Recording Details dialog box.
2. Clear the Publish this recording check box.
3 Click OK to save the changes.

### 7.4 DOWNLOADING A RECORDING

You can download an MP4 version of a published or unpublished recording you made to your computer from the *Record Details* dialog box.

#### 7.4.1 Downloading your Recording

You can use these steps for downloading a recording made by you.

1. Click the **ellipsis** button next to the recording *Name* to open the *Recording Details* dialog box.
2. Click **Download File**. Symphony automatically saves the file to your *Downloads* folder with a name *record.mp4*.
3. Show the file in the folder, change the file name to something more descriptive, and move the file to another location.

#### 7.4.2 Download a Recording Published by Others

You can download an MP4 version of a recording published by someone else from the playback page.

4. Click the preview graphic above the recording date and time to play the recording. The recording launches in a separate Symphony browser window.
5. In the playback controls under the video, click the **download** button. Symphony automatically saves the file to your *Downloads* folder with a randomly generated name.
6. Show the file in the folder, change the file name to something more descriptive, and move the file to another location.

### 7.5 DELETING A RECORDING

You can delete a published or unpublished recording you made.

1. Click the ellipsis button next to the recording *Name* to open the *Recording Details* dialog box.
2. Click **Delete**. You are prompted to confirm the deletion.
3. Click **OK** to proceed with the deletion; otherwise, click **Cancel**.
The recording is removed from the *Recordings* page. If the recording was published, it is no longer visible on the *Recordings* page of other users.