



Crestron Fusion[®] Software Add-in for Outlook[®] Software

Enterprise Management Platform

User Guide
Crestron Electronics, Inc.

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Crestron Fusion Software Add-in for Outlook Software: Enterprise Management Platform

Introduction

The Outlook Add-In (OLAI) adds the Crestron Fusion® software room booking wizard functionality to Microsoft® Outlook software when used with Crestron Fusion installed on-premises. The room booking wizard locates available rooms and resources for meetings and sets actions and presets.

This document provides information on how to open a new meeting, add actions and presets to meetings, and use the configuration hotkeys for the Crestron® add-in software.

For information on installing the OLAI, refer to the Crestron Fusion Software Add-in for Outlook Software Installation Guide (Doc. 7894).

Opening a New Meeting

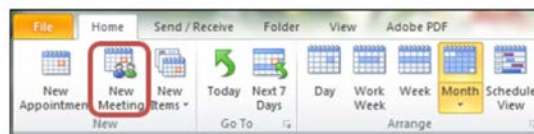
To open a new meeting, do the following:

1. Click the **Calendar** button and then click the **New Meeting** button.

Calendar Button

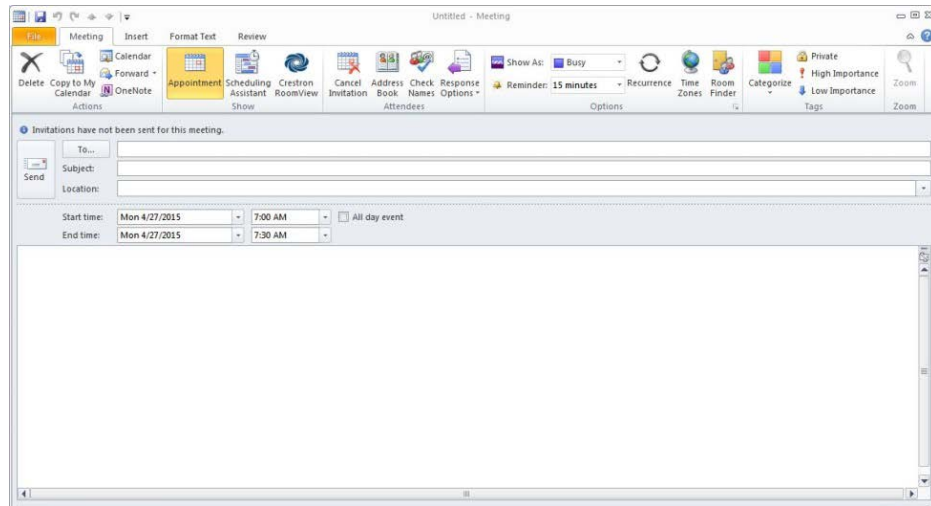


New Meeting Button



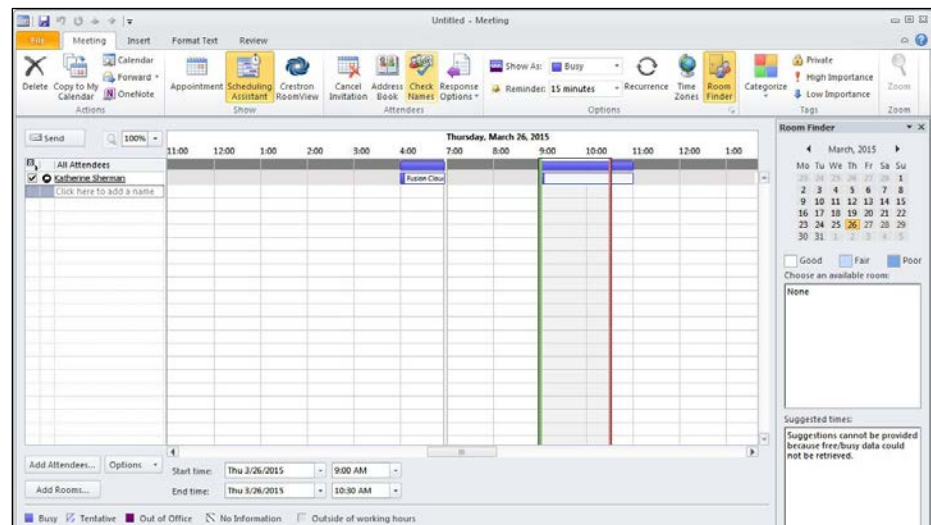
The **Meeting** window opens.

Meeting Window



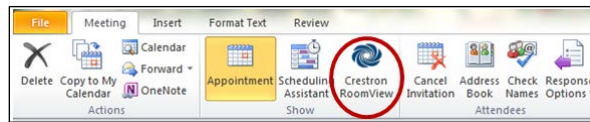
2. In the **To** field, enter the attendees.
3. In the **Subject** field, type a description.
4. In the **Location** field, type the meeting location.
5. In the **Start time** and **End time** fields, set the start and end time for the meeting.
6. In the body of the window, enter any meeting information to be shared with the recipients.
7. Click the **Insert** tab to attach files, charts, etc.
8. Click the **Scheduling Assistant** button to open the **Scheduling Assistant** window. You can check the availability of attendees, change meeting times, and add attendees.

Scheduling Assistant Window

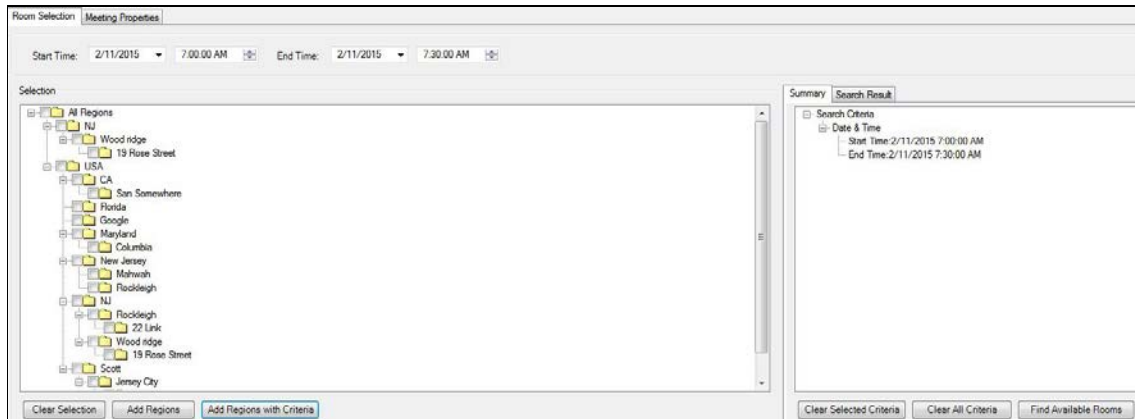


9. Click the **Crestron RoomView**® application button to open the **Room Selection** window and load the Crestron Fusion room booking wizard functionality.

Crestron RoomView Button



Room Selection Window



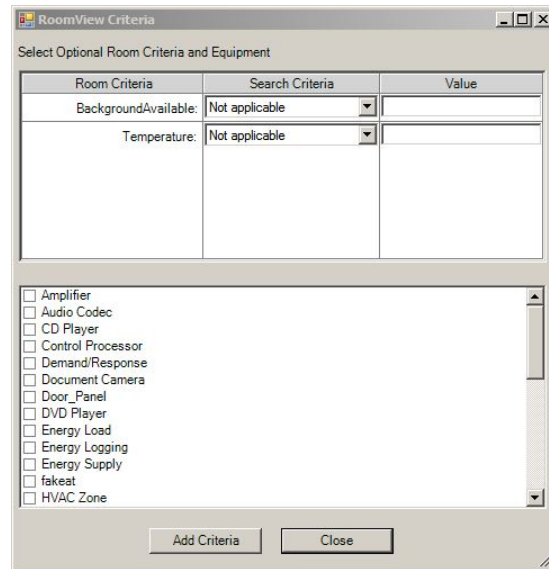
10. The **Start Time** and **End Time** fields are automatically set to the time and date the new meeting was scheduled. To reset the date and time, click the drop-down arrows or enter the date and time into the **Start Time** and **End Time** fields.
11. In the **Selection** section, click the check boxes for the regions where the meeting is to take place.

NOTE: Regions can also be selected by right-clicking them.

To add or remove regions, use the following buttons.

- **Clear Selection:** This button removes the selected regions so that new information can be entered.
 - **Add Regions:** This button adds regions with no additional criteria. The selected regions are displayed in the **Summary** section.
 - **Add Regions with Criteria:** This button specifies room assets and room properties for the selected region.
12. Click the **Add Regions with Criteria** button to open the **RoomView Criteria** window. This allows filtering room searches by customer room values and provides the exact functionality.

RoomView Criteria Window

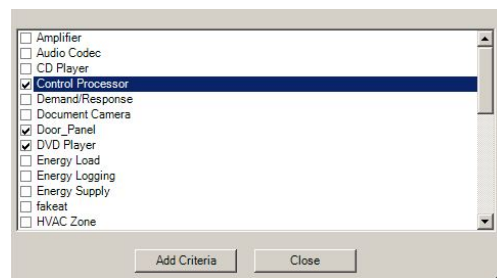


In the **Select Optional Room Criteria and Equipment** section, the following are available.

- **Room Criteria:** This field displays the criteria name.
- **Search Criteria:** This field specifies how the criteria are evaluated in the search. Click the drop-down arrow to make a selection.
- **Value:** This field specifies the value of the search criteria.

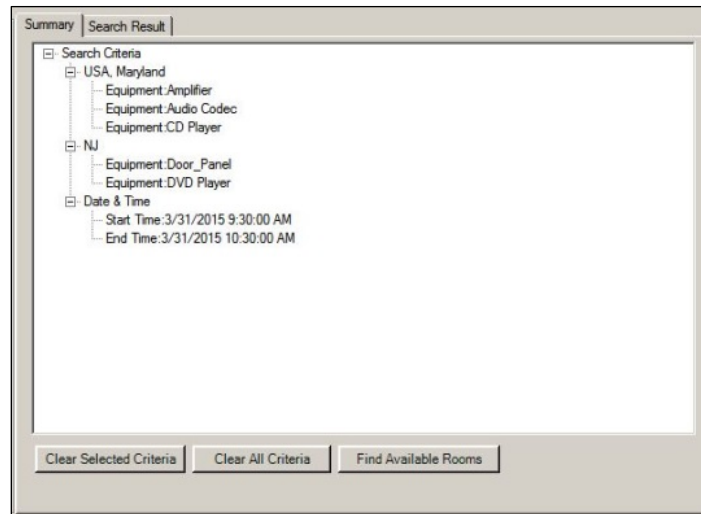
13. At the bottom of the **Room Criteria** window, click the check box next to the equipment to include in the search.

Equipment List Section



14. Click the **Add Criteria** button to close the **RoomView Criteria** window. The choices are added to the **Summary** window.

Summary Window Showing Regions with Selected Equipment

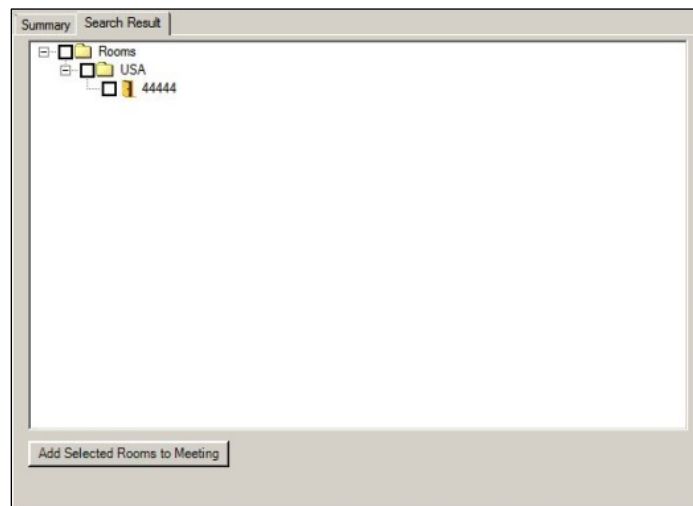


In the **Summary** window, the following buttons are available.

- **Clear Selected Criteria:** Click a piece of equipment under a region and then click the **Clear Selected Criteria** button to delete the selected equipment.
To clear an entire list of equipment under a region, click the region node and then click the **Clear Selected Criteria** button. For example, in the **Summary** window above, click the **NJ** node to remove the **Door_Panel** and **DVD Player** from the search criteria.
- **Clear All Criteria:** Click this button to clear all criteria from all regions.
- **Find Available Rooms:** Click this button to initiate a search for the available rooms using the selected criteria.

15. Click the **Find Available Rooms** button to initiate the search. The available rooms are displayed in the **Search Result** window.

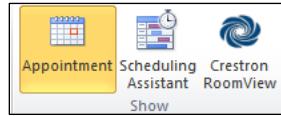
Search Result Window



16. Click a check box to select a room.

- Click the **Add Selected Rooms to Meeting** button. A pop-up window opens stating that all selected rooms have been added to the meeting. Click the **OK** button to close the window.
- Click the **Appointment** button to review the meeting information and then click the **Send** button to send the meeting invitation.

Appointment Button



NOTE: For more information on setting up meetings using Outlook, click the **Help** icon located at the top right corner of the **Calendar** window.

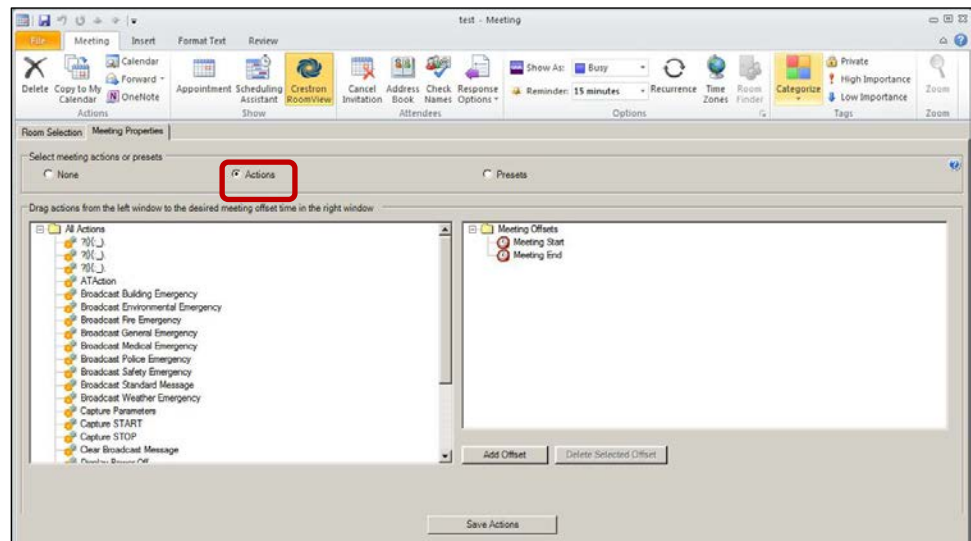
To add actions or presets to a meeting using the room booking wizard, refer to the “Adding Actions to a Meeting” section and the “Adding Presets to a Meeting” section.

Adding Actions to a Meeting

Actions provide a way to control lights and equipment in a room associated with a meeting.

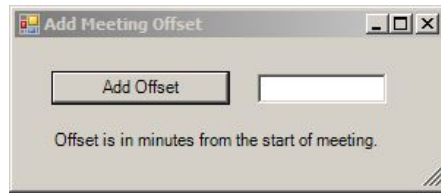
- Click the **Meeting Properties** tab and select the **Actions** radio button to display all available actions.

Meeting Properties: Actions Selected



- Drag the actions to the desired time of the meeting such as **Meeting Start** or **Meeting End**.
- Click the **Add Offset** button to open the **Add Meeting Offset** window.

Add Meeting Offset Window



Adding an offset applies actions throughout a meeting. The offset time is always relative to the start time of the meeting. Offsets are added in minutes from the start of the meeting.

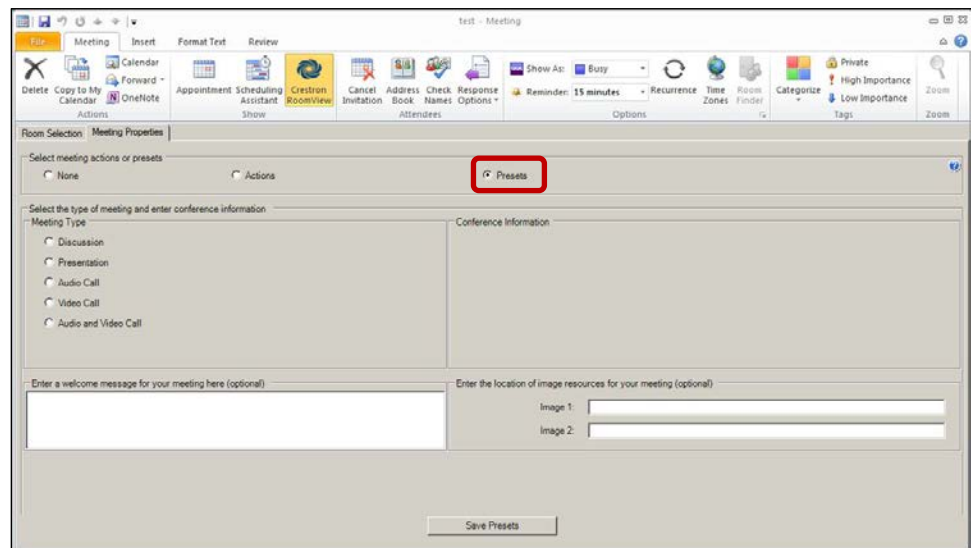
4. Click the **Delete Selected Offset** button to delete selected offsets.
5. Click the **Save Actions** button.
6. Click **Send** from the **Appointment** or **Scheduling Assistance** window to create a meeting.

Adding Presets to a Meeting

Presets specify the meeting type and associated conference information.

1. Click the **Meeting Properties** tab and select **Presets** to display all available actions.

Meeting Properties Window: Presets Selected



NOTE: Meeting Type presets and their related Conference Information fields can be created and edited in Crestron Fusion. The fields discussed in this section are those that are displayed by default.

The table below provides examples of how the default meeting presets in Crestron Fusion can be used to set up the conference room experience.

Conference Room Experience Example

Meeting Type	Meeting Information Provided by Crestron Fusion	Conference Room Experience Example
Discussion	A welcome message	The lights are turned on. The thermostat is set. The welcome message is displayed on the door panel for the attendees.
Presentation	A shared document location	The lights are lowered. The projector is turned on. The document from the shared path is retrieved and displayed.
Audio Call	An audio conference bridge number A passcode for the audio bridge A shared document location	The lights are turned on. The projector is turned on. The audio bridge number is dialed. The document from the shared path is retrieved and displayed.
Video Call	A video call number A shared document location	The lights are lowered. The projector is turned on. The video codec is dialed. The document from the shared path is retrieved and displayed.
Audio and Video Call	A welcome message An audio conference bridge number A passcode for the audio bridge A video call number A shared document location A welcome message	The lights are lowered. The projector is turned on. The audio bridge number is dialed. The video codec is dialed. The document from the shared path is retrieved and displayed. The welcome message is displayed on the door panel for the attendees.

2. In the optional **Enter a welcome message for your meeting here** field, enter a message. The message displays on the touch screen, projector, etc., that is attached to the control processor in the meeting room.

The **Image 1** and **Image 2** fields specify an image file that is displayed in the same manner as the welcome message described in the table above. When specifying the image file, enter the full path to the file.

NOTE: Crestron Fusion does not verify the path or file name entered. Be sure to check the information.

3. Click **Save Presets** to save settings.
4. Click the **Send** button on the **Appointment** or **Scheduling Assistance** window to create a meeting.

Using the Configuration Hotkeys

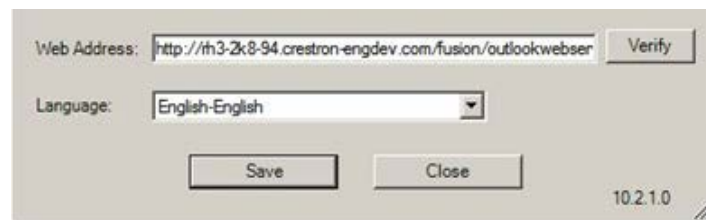
There are two hotkeys available for use with the Outlook Add-In to establish and verify the Crestron Fusion Web Service address (Ctrl+Alt+W) and to check the location of the log file directory (Ctrl+Alt+L).

Ctrl+Alt+W

The Ctrl+Alt+W key combination allows the user to enter, edit, or verify the Crestron Fusion Web Service address.

1. Press Ctrl+Alt+W to open the configuration dialog box.

Configuration Dialog Box



2. To change the web service address, enter the new address for the web service and click the **Verify** button.
3. If verification is successful, click the **Save** button to update the settings.
4. Click the **Close** button.

Ctrl+Alt+L

The Ctrl+Alt+L key combination allows the user to view the location of the log file directory.

1. Press Ctrl+Alt+L to open a message box showing the location of the log file directory.

Log File Directory Message Box



2. Click the **OK** button.

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