POLYCOM®

User's Guide for Polycom® HDX® Systems and the Polycom Touch Control

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Customer Feedback

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Contents

User's Guide for Polycom® HDX® Systems and the Polycom Touch Control

This guide includes overview information that you might find helpful when you're just starting to learn about video conferencing or when you have experience, but you need a quick refresher.

The latest user information about version 3.0.5 of the Polycom HDX System software, version 1.5.0 of the Polycom Touch Control Operating System software, and version 1.5.0 of the Polycom Touch Control Panel software is provided in this guide.

This guide covers instructions for the Polycom HDX room systems with the Polycom Touch Control.

Using the Polycom Touch Control

You use the touch control to place calls, adjust the volume, control the camera, show content, and select options.

Use the Polycom Touch Control to control a Polycom HDX system.

Touch the screen to select an item. Drag your finger across the screen to scroll.

Scroll left and right on the Home screen for quick access to common calling and configuration tasks.

Press Back to go to the previous screen. Press Home to go to the Home screen.
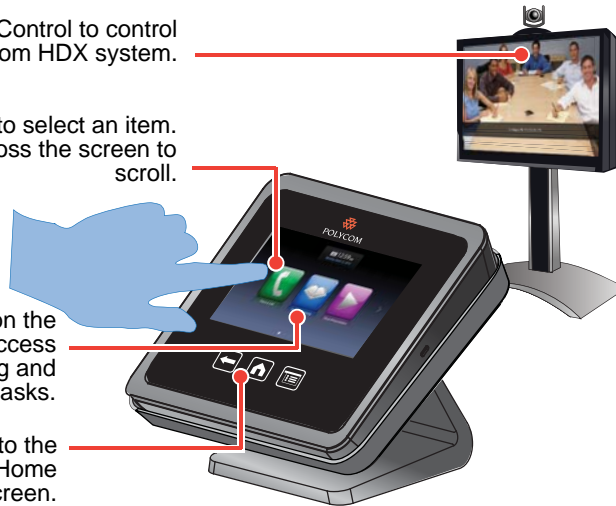
Use the call screen for quick access to common tasks while you are in a call.

Powering the System On and Off

⚠ Caution. In order to avoid corrupting the file system, always power off a Polycom HDX system using the power button on the system. After turning the power off in this way, wait at least 15 seconds before you unplug the system from its power source. This helps ensure that the system powers off correctly.

The ⏻ Power button affects any HDX system within the range of the remote control, regardless of the Channel ID setting.

To power on the Polycom HDX system:

>> Press the power switch on the front of the HDX system. The Polycom splash screen is displayed on the monitor within about 10 seconds.

To power on the Polycom Touch Control:

>> Reconnect the LAN cable to the underside of the device. The Home button is lit when the device is powered on.

To power off the Polycom HDX system:

>> Press and hold the power switch on the front of the system for 2 seconds. After turning the power off in this way, wait at least 15 seconds before you unplug the system from its power source.

To power off the Polycom Touch Control:

1 From the Home screen touch **User Settings**.

2 Scroll to the Power section.

3 Select **Touch Control Power**.

4 In the menu that appears, select **Power Off the Touch Control**. If you choose to power off the Polycom Touch Control, you must disconnect and reconnect the LAN cable to power it on again.

To wake up the Polycom Touch Control:

>> The touch control goes to sleep after 2 minutes of inactivity. Touch the screen to wake it up.

Power On Self Test (POST)

After the splash screen is displayed, the HDX system automatically performs system health checks every time the system starts. As each check begins, a message appears on Monitor 1.

If a test fails, press **Hangup** on the remote control to continue the startup process. If you're using the Polycom Touch Control, press **Hangup** on the virtual remote control. However, even if the system appears to start up, Polycom recommends that you contact Technical Support before using your HDX system if any of the system tests fail.

Calling and Answering

Answering a Call

The way a Polycom HDX system handles incoming calls depends on how it is configured. It either answers the call automatically, rejects the call automatically, or prompts you to answer the call manually.

If the Polycom HDX system does not answer incoming calls automatically, you are prompted to answer manually. Touch **Answer** or **Ignore** when a call comes in.

Placing a Call

You can use your system to place a video call in any of these ways:

- Entering a name or number on the Place a Call screen.

- Choosing a site from:
  - Recent Calls list
  - Favorites screen
  - Directory

- Calling into a scheduled meeting from the Calendar screen.

Calling by Entering a Name or Number

To place a call by entering a name or number:

1   From the Home screen touch 📞 **Place a Call**.

2   In the dialing field, enter the dialing information. Depending on the capabilities of your system and the system you are calling, the dialing information could look like one of these examples:

- 10.11.12.13 (IPv4 address—include the dots)

- 1b11:22ad:333a:444b:5cc5:66d6:e777:88f8 (IPv6 address—include the colons)

- 2555 (E.164 extension for H.323 or SIP)

- stereo.polycom.com (DNS name)

- 19782922854 (ISDN or phone number)

- user@domain.com (SIP)

To enter letters, touch ⌨ **Keyboard**. Touch and hold keys to access accented characters.

To backspace, touch ⌫ **Delete**.

3   Touch 📞 to place the call.

Call progress indicators appear on the HDX system monitor to show that the call is in progress. When the indicators turn green, the call is connected.

For more information about using the Place a Call screen, refer to Types of Video Calls You Can Make on page 8.

Calling from the Recent Calls List

The Recent Calls screen provides details of all incoming and outgoing calls, including the time of the calls.

To place a call from the Recent Calls screen:

1   From the Home screen, touch **Place a Call**, and then touch Recent Calls.

2   Touch an entry to place the call.

You can filter the list by touching All, Placed, or Received.

To see more details about a call listed on the Recent Calls screen, touch next to the entry.

Calling from the Favorites Screen

You might be able to see a list of Contacts on the Favorites screen.

To place a call from the Favorites screen:

1   From the Home screen touch **Place a Call**, and then touch **Favorites**.

2   Touch an entry to place the call.

    To see more details about an entry in Favorites, touch next to the entry.

To add, edit, or delete Favorites:

1   In the browser address line, enter the HDX system's IP address to access its web interface.

> To use the HDX web interface, you must use Internet Explorer version 6.x, 7.x, or 8.x and configure your browser to allow cookies. Enter the IP address of the HDX system using the *http://IPaddress* (for example, *http://10.11.12.13)* or *https://IPaddress* format. If you operate within a secure environment with the Maximum Security Profile or Security Mode enabled, you must use the https://IPaddress format.
>
> Using the HTTPS protocol ensures that the configuration of all login information (such as user names and passwords) are transmitted using an encrypted channel, including those user names and passwords used to communicate with third-party systems on your network. Using the HTTPS protocol severely limits the ability of anyone on the network to discover these credentials.

2   Select **Place a Call > Directory**.

3   Select **+Favorites** in the directory list.

4   Do one of the following:

    —   Select **Create Contact** to create a new Favorite.

    —   Select **Add from Directory** to add an existing directory entry to Favorites.

    —   Highlight a Favorite, and then edit or delete it.

Calling from the Directory

If the system is registered with a directory server, you can browse or search for a name to call.

To place a call from the directory:

1   From the Home screen touch **Search the Directory**.

2   Scroll to the entry or group you want, or touch the **Search** field to start entering the name.

3   Touch an entry to place the call.

When calling a contact with multiple devices, the HDX system attempts to place the call as follows:

1   Using the first call type in the preferred dialing order configured by the administrator, the system calls the first device listed for the directory entry, then the second device, and so on until the call connects.

2   If the call fails to connect to any device, the system attempts to place the call using the next call type in the preferred dialing order, starting with the first device, then the second device, and so on until the call connects.

To call a specific device, touch the **Info** button next to the entry, and then touch the number for the device that you want to call.

Calling from the Calendar

If your HDX system is configured to connect to the Microsoft Exchange Server, and the Polycom Conferencing for Microsoft Outlook add-in is installed at your site, you can join a scheduled meeting from the Calendar screen. If the Calendar screen is blank, the system is not connected to the Microsoft Exchange Server or no meetings are scheduled.

To join a scheduled meeting from the Calendar screen:

1   From the Home screen touch **Calendar** or the date and time display at the top of the screen.

2   Touch **Join** to call into the meeting. Only meetings scheduled with the Polycom Conferencing Add-In for Microsoft Outlook display a **Join** button.

You can switch between day-view and month-view screens. You can touch **Info** in the day view to see the meeting details and join the meeting.

Call Screen

When you are in a call, the call screen appears. From the call screen you can complete these tasks:

- Touch the **Volume** slider to adjust the volume at your site.
- Touch the **Mute** icon to mute or unmute your microphones.
- Touch **Hang up** to end the call.
- Touch **Add call** to add another call participant.
- Touch **Cameras** to adjust the cameras or view presets.
- Touch **Keypad** to send DTMF tones.
- Touch **Show Content** to select, start, or stop content.
- Touch **Layout** to change the video layout at your site.
- Touch i to get more information about the participants in the call or view call statistics.
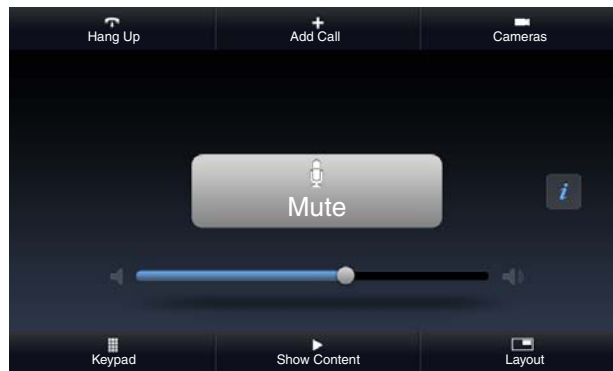
If you navigate away from the call screen during a call, you can return to it at any time by touching the green **Back to the Call** button.

Ending a Call

To hang up from a call:

1 From the call screen touch **Hang Up**.

2 If prompted, confirm that you want to hang up.

> In audio-only calls, if the person on an analog telephone hangs up first, you need to disconnect the Polycom HDX system from the call, just as you would hang up a telephone receiver in a regular phone call.

Types of Video Calls You Can Make

Depending on your system configuration, you might be able to make calls using ISDN, H.323, SIP, or V.35/RS-449/RS-530. You can place an audio-only call from Polycom HDX systems that have Analog Phone or Voice Over ISDN enabled.

The following table lists some possible call combinations.

From...	You can call...	By dialing...
ISDN	ISDN	Phone number
	IP	Phone number of the far-site gateway and the extension (E.164 address) of the far site. Enter the extension after the gateway number or wait until the gateway prompts you for the extension.
LAN	Networked and Public Sites	SIP URI, E.164 address, DNS name, or IP address.
	Protected and Private Sites	Typically, the far site's gateway number then the number of the far-site system. Consult with the far site about the best method for placing the call.
	ISDN	Depending on the H.323 gatekeeper or SIP server, the access code of the near-site gateway, the speed code, and the ISDN number of the far site. Contact your system administrator for more information.

Points to note about special dialing scenarios:

- When you call an IP system through a gateway that requires an extension (E.164 address), enter the extension in the dialing field whenever possible. Check with your network administrator for the extension delimiter you need to enter into the dialing field. For example, some networks use ## to separate the extension from the IP address.

- If you need to insert a pause, add one comma in the dial string for each second you want the system to pause.

Participating in an Encrypted Call

If encryption is enabled on the system, a locked padlock icon appears on the monitor when a call is encrypted. If a call is unencrypted, an unlocked padlock appears on the monitor.

• If you are in a point-to-point call or a multipoint call hosted by another system, the padlock icon displays the state of your individual connection.

• If you are hosting a multipoint call, the padlock icon displays the combined state of all connections: encrypted if all connections in the call are encrypted, unencrypted if one or more connections in the call are not encrypted.

In one call, some connections might be encrypted while others are not. The padlock icon might not accurately indicate whether the call is encrypted if the call is cascaded or includes an audio-only endpoint. If encryption is required on your system, the far end must support encryption or the call will not be completed. To avoid security risks, Polycom recommends that all participants communicate the state of their padlock icons verbally at the beginning of a call.

Controlling What You See

Selecting and Adjusting a Camera or Other Video Source

You can use the touch control to select and adjust the main camera or other near-site or far-site video sources, such as document cameras, computers, VCRs, or DVD players. You might be able to adjust other auxilary cameras or far-site cameras that support pan, tilt, and zoom movement.

> You can adjust the far-site camera only if it is configured at the far site to allow you to control it.

To select a near-site or far-site camera, or other video source:

1   From the call screen touch **Camera**, or from the Home screen touch **Cameras**.

2   If you are in a call, touch **Near** or **Far** to select either near-site or far-site control.

3   Touch **Select Camera**, and then touch the camera or other video source you want to use.

The icon for the video source moves up slightly on the screen, and the video source is shown to the call participants.

To adjust a Polycom EagleEye HD, Polycom EagleEye II, Polycom EagleEye 1080, Polycom EagleEye III, or Polycom EagleEye Director using the touch control

1   Select either a near-site or far-site video source to control. During a multipoint call being hosted by a system in the call, you can only adjust a camera at the far site that is currently speaking.

> If you are using an EagleEye Director and camera tracking is on, you must turn camera tracking off before adjusting the camera.

2   Touch **Control Camera**.

3   Touch the arrow buttons on the touch control to move the camera up, down, left, or right.

4   Touch [icon] and [icon] to zoom out or in.

To adjust a Polycom EagleEye View camera:

1   Manually swivel the camera right, left, up, or down to frame the view.
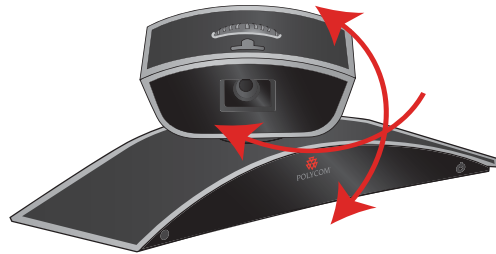
2   Turn the focus wheel to adjust the focus.

3   Select the camera, and then touch [icon] and [icon] .

    If you zoom in, you can pan or tilt the camera electronically by pressing the arrow buttons.

To open or close the privacy shutter on the Polycom EagleEye View camera:

>> Move the slider to the right to close the privacy shutter, or to the left to open it. You can still make and receive calls when the shutter is closed, but the people at the far site cannot see you.
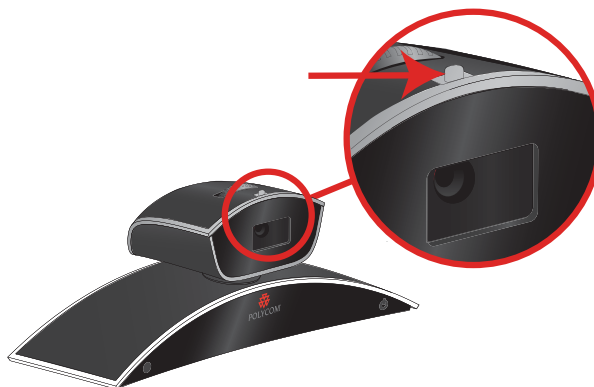
Starting and Stopping Camera Tracking with EagleEye Director

If EagleEye Director tracking is enabled, the camera follows the person or people who are speaking. This tracking action, also called automatic camera positioning, can be manually started or stopped.

To start camera tracking:

1 Touch **Cameras** on the Home screen or Call screen.

2 If the EagleEye Director is not currently selected, take the following steps:

    a Touch **Select Cameras** and select the EagleEye Director camera.

    b Touch **Control Camera**.

3 Select **Start Camera Tracking**.

To stop camera tracking:

>> Touch **Cameras** on the Home screen or Call screen and select **Stop Camera Tracking**.

Camera tracking can also start or stop based on the following actions:

• Camera tracking starts automatically when you make a call.

• Camera tracking stops once you hang up a call.

• Camera tracking temporarily stops when you mute the HDX system. It resumes when you unmute the HDX system.

Setting and Using Camera Presets

Camera presets are stored camera positions that you can create ahead of time or during a call.

Presets allow you to:

- Quickly point a camera at pre-defined locations in a room.

- Select a video source such as a VCR or DVD player, a document camera, or an auxiliary camera.

If your system's camera supports pan, tilt, and zoom movement, you can create up to 10 preset camera positions for the near site camera. Each preset stores the camera number, its zoom level, and the direction it points. These presets remain in effect until you delete or change them.

If far-site camera control is allowed, you can create 10 presets for the far-site camera. These presets are saved only for the duration of the call. You might also be able to use presets that were created at the far site to control the far-site camera.

To view presets or move the camera to a stored preset:

1   From the Home screen or call screen, touch **Camera**.

2   If you are in a call, touch **Near** or **Far** to select either near-site or far-site control.

3   Touch **View Presets**.

    Icons for presets 0-9 are shown on the screen. Solid preset icons indicate stored camera positions. Transparent icons indicate unassigned presets.

4   Touch a number to go to a saved preset.

To store a preset:

1   From the Home screen or call screen, touch **Camera**.

2   If you are in a call, touch **Near** or **Far** to choose a near-site or far-site camera.

3   Touch **Select Camera** to choose a camera or other video source.

4   Touch **Control Camera** to move the camera to the desired position.

5   Touch **View Presets**, then touch and hold a number for 5 seconds to store the preset position. Any existing preset stored at the number you select is replaced.

> You cannot delete a preset. Instead, overwrite an existing preset with the new camera position.

Changing the Layout during a Video Call

When the call connects, you can change the video layout displayed at your site.

>> From the call screen, touch **Layout**. If the call screen has no Layout tab, you cannot change the video layout at your site.

— Touch **Inside** to change the location of the PIP.

— Touch **Outside** and then select **Touch to Change Layout** in the middle of the screen to cycle through different Dual Monitor Emulation layouts on the HDX system monitor.

— To swap near and far video, which includes both people and content, touch **Swap Picture**.

— If the call is hosted by a Polycom RMX®system, a Multiple Site Layouts tab might appear, which you can touch to select various multipoint views for different numbers of sites. Touch the My Picture tab to return to the Inside, Outside, and Swap Picture PIP choices.

Adjusting Touch Control Brightness

You can adjust the brightness of the Polycom Touch Control screen.

To adjust the touch control display brightness:

1 From the Home screen touch **User Settings**.

2 Select **Touch Control** tab if it is visible.

3 Use the slider under **Display** to adjust the display's brightness.

Controlling What You Hear

Adjusting Volume

You can raise or lower the volume of the meeting. Changing the volume affects only the sound you hear at your site.

To adjust the volume:

1 From the Home screen touch **Audio**.

2 Use the **Volume** slider to increase or decrease the call volume. When you are in a call, volume control is available on the call screen and in the top right corner of other screens.

Polycom, Inc. 13

Muting the Microphone

You can mute the microphone if you do not want the far site to hear conversations at your site.

To mute or unmute the microphone:

>> From the Home screen touch **Audio**. On the audio screen you can

touch **Mute** to control your microphones. When you are in a call, mute controls are available on the call screen and in the top right corner of other screens.

If a Polycom tabletop microphone array is connected to your system, you can also mute the call by pressing on the microphone.

Points to note about muting the microphone:

- Muting the microphone mutes audio coming from auxiliary audio inputs on Polycom HDX 7000 series, Polycom HDX 8000 series, and Polycom HDX 9000 series.
- Muting the microphone does not mute audio coming from any device connected to the VCR or content audio inputs.
- The red mute indicator on the front of the Polycom EagleEye View camera is lit when the system is muted or when a Polycom microphone is connected and muted.
- The microphone might automatically mute when the system automatically answers an incoming call.

Adjusting Touch Control Volume

You can adjust the volume levels of the Polycom Touch Control ring tone and user alert tones.

To adjust the touch control volume:

1 From the Home screen touch **User Settings**.

2 Select **Touch Control** tab if it is visible.

3 Use the **Volume** slider to adjust the Polycom Touch Control volume.

Enjoying Stereo Audio in Video Calls

If your video conferencing room is configured to use stereo sound, the left and right microphone inputs are configured during system setup. It is important that you do not move the microphones as this might detract from the stereo audio experience.

Stereo audio is only available in video calls of 256 kbps or higher.

Showing Content

Depending on how your system is configured, you might be able to show content that is stored on a computer or a USB drive. When you show content, the far site can see you and what you see on the computer screen.

You might be able to show the following to the far sites:

- Any information stored on a computer
- Real-time annotations made using the Polycom UC Board™
- Some types of information stored on a USB drive
- A paper document or object placed on a document camera
- A videotape or DVD

You can show one content source and one people video source at a time, and you can switch to a different type of content or people video source if you need to. Participants at other sites can also show content or people video sources. Content shown is from one site at a time; another site sharing content overrides any content being shared.

When you are showing content, a message appears on your main monitor. Whether you also see the content on your monitor or projector depends on how your system was configured.

Showing Content from a Computer Connected Directly to the Polycom Touch Control

People+Content IP allows you to send content from a computer that is connected directly to the Touch Control.

To start showing content from a computer connected directly to the Touch Control:

1 Using the USB content cable, connect the computer directly to the underside of the Touch Control.

If autorun is enabled on the computer, you are prompted to run People+Content IP. If autorun is disabled on your computer, People+Content IP shows up as an external drive, and you must navigate to **My Computer** to launch it manually.

2   Launch People+Content IP.

3   Open the content you want to show, and click ▶ in People+Content IP.

4   Click ■ in People+Content IP to stop showing content.

Showing Content with People+Content™ IP

People+Content™ IP allows you to send content from a computer that is not connected directly to the Polycom HDX system or Polycom Touch Control.

> **Points to note about People+Content IP:**
> • People+Content IP provides video-only content. No audio is shared.
> • People+Content IP supports any computer desktop resolution with color set to 16-bit or higher.
> • Your computer resolution can be set to anything, but People+Content IP scales the image to 1024x768 or 1280x720.
> • The People+Content IP application must be installed on a computer.

To install People+Content IP on a computer:

1   On a computer with a Microsoft® Windows XP, Windows Vista, or Windows 7 operating system, open a web browser and go to www.polycom.com/ppcip.

2   Download and install the People+Content IP software.

To start showing content:

1   On the computer, start the Polycom People+Content IP application.

2   Enter the IP address or host name of the Polycom HDX system and the meeting password, if one is set. To view the IP address of the HDX system, touch 🛈 **System** from the Home screen and then touch 🛈 next to **HDX System**.

3   On the computer, click **Connect**.

4   Open the content you want to show, and click ▶ in People+Content IP.

> If you are using multiple screens on your computer, move the People+Content IP icon to the screen you want to share.

To stop showing content:

1   If the People+Content IP toolbar is minimized, maximize it by clicking the icon in the task bar.

2   Click ⬤ in People+Content IP.

3   Click **Disconnect**.

> To keep a multipoint call hosted by the HDX system secure, content is automatically stopped when a participant joins the call.

Showing Content from a Computer Connected Directly to the HDX System

Before you show content, check that the computer video output is configured to use one of these supported resolutions and refresh rates.

Polycom HDX 9006, Polycom HDX 8000 series, Polycom HDX 7000 series, and Polycom HDX 6000 series systems

Resolution	Refresh rates (Hz)
640 x 480	60, 72, 75, 85
800 x 600	60, 72, 75
1024 x 768	60, 70, 75
1280 x 720	50, 60
1280 x 960	60
1280 x 1024	60, 75
1680 x 1050	60
1920 x 1080	60

Polycom HDX 9004, Polycom HDX 9002, and Polycom HDX 9001 systems

Resolution	Refresh rates (Hz)
640 x 480	60, 72, 75
800 x 600	60, 72, 75
1024 x 768	60, 70, 75
1280 x 720	50, 60
1280 x 1024	60

The way you set the resolution and refresh rate differs, depending on the type of operating system you have. Check your computer's manual or help topics for the appropriate steps.

To start showing content:

To show people and content at the same time, the HDX system input must be configured for content.

1   Make sure the computer is powered on and connected to the Polycom HDX system.

Polycom HDX 9004: You can connect a computer to video input 4 or 5. When you connect to video input 4, you can also connect to audio input 4 to share sound from your computer.

Polycom HDX 9002, Polycom HDX 9001: You can connect a computer to video input 4.

Polycom HDX 9006 or Polycom HDX 8000 series: You can connect a computer to video input 4. You can also connect to audio input 4 to share sound from your computer.

Polycom HDX 7000 series: You can connect a computer to video input 3. You can also connect to audio input 3 to share sound from your computer.

Polycom HDX 6000 series: You can connect a computer to video input 2. You can also connect to the audio input to share sound from your computer.

2   From the Home screen or call screen, touch **Show Content**.

3   Touch the computer input.

Audio from the content input sources in step 1 is muted unless the content input is selected as a video source.

To stop showing content:

>> From the Content screen, touch the computer source to stop showing it.

Showing Content from a USB Drive

A Polycom Touch Control can show content stored on a USB drive. You can annotate the file while showing it to the far sites.

To show content from a USB drive using a Polycom Touch Control:

1 Connect the USB drive to the USB connector on the right side of the Polycom Touch Control.

2 From the Home screen or call screen, touch **Show Content**.

3 To view the files stored on a USB drive, touch the USB drive button.

If another participant has People+Content IP connected to the HDX system to show content, that content must be stopped before the Polycom Touch Control can show content from a USB drive.

4 Navigate to the file that you want to show.

The Polycom Touch Control can open slideshows (.pptx), documents (.pdf), and images (.bmp, .gif, .jpg, .png).

— To browse by **Name**, **File Type**, or **Date Modified**, do the following:

» Touch the tabs at the bottom of the screen.

» Touch a tab again to reverse the sort order.

» Touch a folder to open it.

» Press to go back one level.

— To filter by All Files, Recently Viewed Files, or type of file such as Slide Presentations, Documents, or Images, press .

— To search for a file, touch the search field at the top of the screen. Touch a folder to open it.

5 To view a file, touch it.

Polycom, Inc. 19

6 To show the file to other call participants, touch **Show Content**.

While viewing a file, you can do the following on the Touch Control screen:

— To zoom in or out, touch [icon] and [icon] . To reset the content to its original size, touch [icon] .

You can also zoom in and out by sliding two fingers together or apart on the screen. Touch and drag the image to move it around the screen and view different areas.

— To go back and forth within the pages while showing a file, touch the arrows on the bottom left and right of the Touch Control screen. To view thumbnails, press [icon] , and then touch any thumbnail to jump to that page.

7 To stop showing the content of a file, touch **Stop Content**.

8 To eject the USB drive before disconnecting it, touch the [icon] button.

To annotate the content:

1 While you are showing content from a USB drive, touch [icon] to access the annotation toolbar.

— Touch [icon] to draw red lines on the content.

— Touch [icon] to add yellow highlighting to areas of the content.

— Touch [icon] to white out areas of the content.

2 After you select a tool, touch and drag your finger across the screen to use it. If you are in a call and showing the content, the far sites see your annotations.

3 To clear the annotations, touch [icon] . The annotations are automatically cleared when you go to another page or touch **Stop Content**.

Showing Content from a Document Camera, VCR, or DVD Player

Depending on how your system is configured, you might be able to show different types of information to other sites in a call, such as through a document camera, VCR, or DVD player.

Before the call begins:

• Make sure the document camera, VCR, or DVD player is connected and powered on. Refer to the setup sheet that came with your system.

• Position your document or object on the document camera or insert the videotape or DVD.

To start showing a document, object, videotape, or DVD in a call:

1 From the Home screen or call screen, touch **Show Content**.

2 Touch a content source.

The icon for the video source moves up slightly on the screen, and the content is shown to the call participants.

To stop showing a document, object, videotape, or DVD in a call:

>> From the Content screen, touch the content source to stop showing it.

The icon for the video source moves down on the screen, and the content is no longer shown to the call participants.

Showing Content with Polycom People on Content™

The Polycom People on Content™ feature allows you to show yourself on top of content that you are sharing. The effect is similar to a weather newscast on television. This feature is sent as a people source, therefore you cannot send a content source when using People on Content.
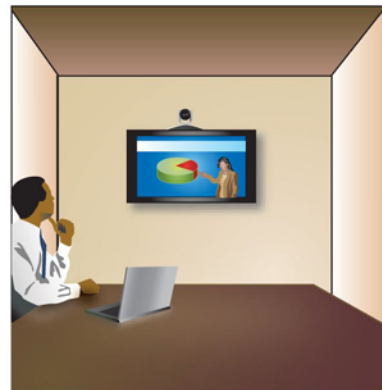
For more information on how to set up a room to maximize the People on Content feature, see the *Administrator's Guide for Polycom HDX Systems*. You can also contact your administrator for information about enabling or configuring People on Content.

Follow these guidelines when you are presenting content with People on Content:

• Wear solid neutral-colored clothes.

• Avoid wearing black, white, or the color of your background.

• Make sure that the room is well lit.

• Stand about 3 feet in front of the background to avoid casting shadows on it.

To show content with People on Content:

1 Make sure that the content you want to show is ready.

2 From the Home screen or call screen, touch **Show Content**.

3 Touch **PeopleOnContent**.

The icons for the foreground and background video sources move up slightly on the screen. The camera moves to the preset location. Content is displayed in place of the background.

The foreground and background video sources are configured by the administrator. You can adjust the camera or choose a different foreground video source after you start showing content with People on Content.

To stop showing content with People on Content:

>> From the **Content** screen, touch **PeopleOnContent** to stop the content.

Using the Polycom UC Board™

By using the Polycom UC Board stylus and receiver with a USB hub and either a standard whiteboard and projector or dual-monitor setup, you can show and annotate content in real time from selected Polycom HDX systems. Integration with HDX system software means that you do not need to start an external application to use the UC Board.

For information about setting up and getting started with the UC Board, refer to the *Quick Start Guide for the Polycom® UC Board™* and the *Administrator's Guide for Polycom HDX Systems* at support.polycom.com.

To use the UC Board with your Polycom HDX system:

1 Ensure that the monitors or projector is powered on.

2 Tap the stylus on the content monitor (second monitor) or whiteboard, or begin drawing with the stylus.

The following HDX systems, running software version 3.0.3 or later, support the UC Board:

- Polycom HDX 7000 HD system with Hardware Version C or D

- Polycom HDX 8000 HD system with Hardware Version B

- Polycom HDX 9006

Save and Retrieve Features

UC Board includes the following save and retrieve features:

- Save and retrieve up to 200 images as JPEG files on a USB storage device

- Import and annotate existing JPEG images, such as PowerPoint slides, then save changes to a USB storage device

- View saved slides and pages of thumbnail slides

- Delete slides from the USB storage device

Importing Slides or Graphics to a USB Storage Device for Use with UC Board

To import graphic files or Microsoft PowerPoint slides to a USB storage device:

1 Insert a USB storage device into a USB drive on your Macintosh or Windows computer.

2 On the USB storage device, create a new directory named *My Whiteboard*. This directory name is a requirement.

3 To save PowerPoint slides, complete the following steps. For other file types, skip to the next step.

    a Open the PowerPoint application, then open the desired presentation file.

    b Save the presentation to the directory you created in step 2 as JPEG File Interchange Format.

       When asked, **Do you want to export every slide in the presentation or only the current slide?**, select **Every Slide** and click **OK**.

> You can save .jpg files up to 512 kb or 15840 x 8640. Larger files are not saved.

4 To export graphic files, save them as .jpg format and then save the files to your USB storage device.

5 Insert the USB storage device into the HDX system's USB port.

You can extend the reach of the USB connector on the HDX system by installing an active USB extension cable.

Viewing and Deleting Content on the UC Board

To view slides saved on a USB storage device:

>> With a slide open on the UC Board, do one of the following:

— Hold the stylus close to the UC Board and tap the **Next Arrow** or **Previous Arrow** on the screen to navigate the slides.

— Hold the stylus close to the UC Board and click the large button shown in the following figure to go to the next slide or click the small button to go to the previous slide.

To view thumbnails of slides saved on a USB storage device:

1 On the UC Board screen, tap the **Thumbnail** icon with your stylus.

2 Thumbnail pages are loaded onto the UC Board screen. When your presentation contains more than 20 slides, a number at the top of the UC Board screen displays your current page. You can load up to 10 pages of thumbnails with 20 slides on each page.

3 To navigate through the slides in thumbnail view, do one of the following:

— On the UC Board screen, use your stylus to tap the **Next Arrow** to view the next 20 slides or the **Previous Arrow** to view the previous 20 slides.

— Hold the stylus close to the UC Board and click the large button for the next set of 20 slides or the small button for the previous set of 20 slides.

Points to note about the UC Board

When a USB memory device connected to your HDX system, the following scenarios are possible:

- When you accept an incoming call, the UC Board closes and the current content is saved automatically.

- When a point-to-point call ends, the UC Board closes and the current content is saved automatically.

- In a multipoint call, if the far end hangs up the call, the UC Board content does not close. When the near site also hangs up the call, the UC Board closes and the content is saved.

- If you annotate a slide and save your changes, an original slide copy is saved on the USB storage device, resulting in an original copy and an annotated copy.

- While viewing slides, if you annotate an existing slide or create a new whiteboard and then save your changes, the new whiteboard is stored after the slide you last viewed.

- When slides are deleted, added, or saved, slide order is maintained so that no gaps exist in numbering.

To delete slides from a USB storage device:

1 On the UC Board screen, tap the ![Trash Can icon] **Trash Can** icon with your stylus.

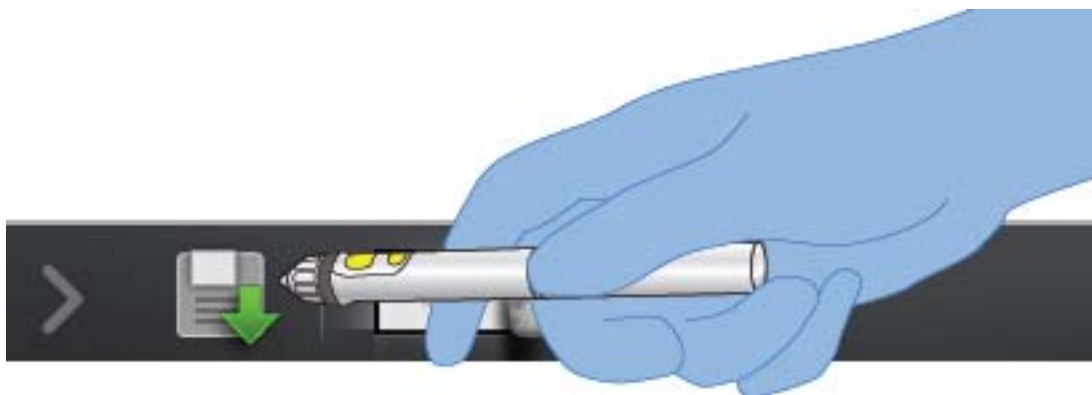   All slides on the page display **X** icons.

2 On the slide you want to delete, tap the **X** icon with your stylus.

Saving Content on the UC Board

To save changes to content on the UC Board:

>> As shown in the following figure, tap the Save ![Save icon] icon with your UC Board stylus.

    You hear a beep tone indicating content is saved to the USB storage device.

Including Multiple Sites in Calls

During a multipoint call, multiple sites can see and hear each other. You can also share content in a multipoint call, just as you can in a point-to-point call.

All systems can participate in multipoint calls. To host multipoint calls, your system must have optional software installed. You can host multipoint calls using a video conferencing system with multipoint capabilities, or you can use a bridge such as the Polycom RMX 1000, Polycom RMX 2000, or Polycom MGC™.

> If your multipoint calls disconnect after 5 minutes, your system might be set up for the multipoint trial. To do untimed multipoint conferences, a multipoint key must be installed. Contact your administrator for assistance.

Placing a Multipoint Call

How you place a multipoint call depends on whether you're using a Polycom HDX system with multipoint capabilities or a bridge such as the Polycom MGC or Polycom RMX conference platform. The number of sites allowed in the call is determined by the capabilities of the system or bridge hosting the call. The call can include any combination of IP H.323, SIP, ISDN, V.35/Serial, and audio-only endpoints, although some ISDN systems might not be configured to allow mixed IP and ISDN calls. For more information about call types, refer to Types of Video Calls You Can Make on page 8.

To place a multipoint call by adding sites to a call:

1 Call the first site.

2 When the call connects, touch **Add Call** from the call screen.

3 Place a call to the next site. For more information, refer to Placing a Call on page 4.

4 Repeat steps 2 and 3 until all sites are connected.

To place a multipoint call using a directory group:

1 From the Home screen touch 📖 **Search the Directory**.

2 Touch a group folder in the directory list.

Depending on how your system is configured, it attempts to call the group using a pre-defined list of call types. Contact your system administrator for more information.

To place a cascaded multipoint call:

1 Call a group from the directory, or place calls one at a time to several other sites. For more information, refer to Placing a Call on page 4.

2 Ask each site to call additional sites.

Passwords for Multipoint Calls

You might be required to enter a meeting password to join a multipoint call. And you can require that far sites enter a meeting password, to prevent unauthorized participants from joining multipoint calls hosted by your HDX system.

> - If you need to generate touch tones (DTMF tones), touch **Keypad** from the call screen. Then use the keypad number buttons.
> - SIP calls do not support meeting passwords. SIP endpoints calling into a multipoint call protected by a password might not be able to join the call.

To enter a meeting password:

- If a prompt appears on the screen, use the onscreen keyboard to enter the password.
- If you hear an audio prompt, use the keypad to generate DTMF tones.

To configure a meeting password:

1   From the Home screen touch **User Settings**.
2   Touch the **HDX System** tab.
3   In the **Meeting Password** field under **Meetings**, enter the password.

Multipoint Viewing Modes

What you see during a multipoint call can vary depending on how the Polycom HDX system is configured, the number of sites participating, the number of monitors you are using, and whether content is shared. The multipoint viewing mode configured on the host system is the one used in the call. To find out more about these modes, please talk to the administrator of your Polycom HDX system. The following table describes the different multipoint viewing modes when an HDX system is hosting the multipoint call.

Setting	Description
Video images from multiple sites can be automatically combined on one monitor in a display known as *continuous presence*.	
Auto	The view switches between continuous presence and full screen, depending on the interaction between the sites.
	If multiple sites are talking at the same time, continuous presence is used. If one site speaks uninterrupted for at least 15 seconds, that site appears in full screen on the monitor.

Setting	Description
Discussion	Multiple sites are displayed in continuous presence. The current speaker's image is highlighted.
Presentation	The speaker sees continuous presence while the other sites see the speaker in full screen on the monitor.
Full Screen	The site that is speaking is shown in full screen to all other sites. The current speaker sees the previous speaker.

Using Chair Control for Multipoint Calls

During some multipoint calls, you can use chair control to manage the video. In this type of call, the chair controller can choose the site whose video is sent to other sites in the conference. The chair controller can also disconnect a site or end the conference. Any participant can choose to view a specific site, request to be the broadcaster, or request to be chair controller.

Only one site at a time can be the chair controller. Before a site can become the controller, the site with control must give up control.

The type of host for the multipoint call and the systems in the call determine whether chair control is available.

Hosted by...	Allows chair control if...
Video Conferencing System	The call includes: • Polycom HDX systems, ViewStation® EX, ViewStation FX, VSX®, and VS4000™ systems connected by IP H.323, ISDN H.320, or both • Other systems connected by ISDN H.320 only
Bridge	Allowed by the bridge

To use the chair control options when you are in a multipoint call:

1 In the browser address line, enter the HDX system's IP address to access its web interface.

> To use the HDX web interface, you must use Internet Explorer version 6.x, 7.x, or 8.x and configure your browser to allow cookies. Enter the IP address of the HDX system using the *http://IPaddress* (for example, *http://10.11.12.13)* or *https://IPaddress* format. If you operate within a secure environment with the Maximum Security Profile or Security Mode enabled, you must use the https://IPaddress format.
>
> Using the HTTPS protocol ensures that the configuration of all login information (such as user names and passwords) are transmitted using an encrypted channel, including those user names and passwords used to communicate with third-party systems on your network. Using the HTTPS protocol severely limits the ability of anyone on the network to discover these credentials.

2 Click **Place a Call**.

3 Click **Chair Control** to go to the Chair Control screen.

> The Chair Control option is only available when the system is in a multipoint call. It is not available in cascaded multipoint calls.

4 Select a site from the list, and then use the controls in the web interface to perform one of these actions:

If you are...	You can do this...	By selecting...
Chair controller	Pass chair control to the selected sites.	**Release Chair**
	View the selected site's video. This remains in effect until you choose **Stop Viewing Site** or you release chair control.	**View Site**
	Return to viewing the video selected by the chair or by the host.	**Stop Viewing Site**
	Send your site's video to the other sites.	**Make Me the Broadcaster**
	Send the selected site's video to the other sites.	**Select Broadcaster**
	Remove the selected site from the conference.	**Disconnect Site**
	Disconnect all sites and end the call.	**End Conference**

If you are...	You can do this...	By selecting...
Participant	Request control of the conference.	**Acquire Chair**
	View the selected site's video. This does not change what other sites see.	**View Site**
	Return to viewing the video selected by the chair or the host.	**Stop Viewing Site**

Changing the Way Calls Are Answered

Temporarily Refusing Calls

If your system administrator has allowed access to the Availability Control, you can automatically refuse incoming calls if you do not wish to be disturbed. Callers get a message that the call was rejected, and you receive no notification about incoming calls. You can, however, make outgoing calls.

To temporarily refuse incoming calls:

1   From the Home screen touch **User Settings**.

2   Touch the **HDX System** tab.

3   Touch **Availability Control** and select **Do Not Disturb**.

Answering Video Calls Automatically

If your system administrator has allowed access to user settings, you can specify whether to answer video calls automatically or to have the system announce incoming video calls and wait for you to answer manually.

Automatically answering calls is convenient, but it can create security issues. An unexpected caller could interrupt a meeting in progress or look at equipment and notes left in an empty room.

To automatically answer video calls:

1   From the Home screen touch **User Settings**.

2   Touch the **HDX System** tab.

3   If you want to automatically answer incoming point-to-point video calls, set **Auto Answer Point-to-Point** to **Yes**.

4   If you want to automatically answer incoming multipoint video calls, set **Auto Answer Multipoint Video** to **Yes**.

Muting Automatically Answered Video Calls

If your system administrator has allowed access to user settings, you can choose whether to mute the audio when automatically answered video calls connect. This prevents callers from overhearing conversations or meetings.

After the call connects, you can touch 🎙 **Mute** when you're ready to unmute the microphones.

> If you enable automatic muting during a call, the audio for the current meeting is not affected.

To mute automatically answered video calls:

1   From the Home screen touch 🟢 **User Settings**.
2   Touch the **HDX System** tab.
3   Under **Meetings**, touch **Mute Auto Answer Calls** to enable the option.

Allowing Video Display on the Web

If your system administrator has allowed access to user settings, you can choose whether to allow viewing of the room where the system is located or video of calls in which the system participates. You would use the Polycom HDX web interface's Web Director to view the room or video.

The default setting is to not allow video display. Be sure to verify whether your system administrator wants the setting to be changed. If you enable this setting, you might open your company's computer system to hackers.

To allow the display of video on the web:

1   From the Home screen touch 🟢 **User Settings**.
2   Touch the **HDX System** tab.
3   Under **Meetings**, touch **Allow Video Display on Web** to enable the option.

Viewing Presence States for Favorites

The Polycom Touch Control shows the following presence icons for Favorites registered with a Presence Service.

Icon	Presence	Description
	Do Not Disturb	One of the contact's devices is set to Do Not Disturb.
	In a Call	At least one of the contact's devices is in a call, and none of the devices is set to Do Not Disturb.
	Available	At least one of the contact's devices is available for a call, and the contact's other devices are available, away, or offline.
	Idle	The contact's devices are either idle or offline.
	Offline	All of the contact's devices are offline.
	Unknown Presence	The presence state for all of the contact's devices is unknown.

If your system is registered to a Microsoft Office Communications Server (OCS) or Microsoft® Lync™ Server 2010 directory server, refer to Viewing Microsoft Office Communications Server or Microsoft Lync Server 2010 Presence States on page 34.

Using Microsoft Office Communications Server 2007 R2 or Microsoft Lync Server 2010 Features with Video Calls

Depending on how your system is configured, you might be able to search a Microsoft Office Communications Server 2007 R2 or Microsoft Lync Server 2010 directory, view a list of Microsoft OCS or Microsoft Lync contacts, see if the contacts are online, and call them without knowing or remembering their addresses.

Microsoft Office Communications Server 2007 R2 and Microsoft Lync Server 2010 directory searches only return an entry whose last name begins with your search string. First names beginning with the search string are not returned in the results.

Managing Contacts Using Office Communicator or Microsoft Lync

Office Communicator and Microsoft Lync contacts appear on the Favorites screen. To add or delete Office Communicator or Microsoft Lync contacts on the Polycom HDX system, use the Office Communicator or Microsoft Lync application.

To manage your contacts using Office Communicator or Microsoft Lync:

1   Log in to Office Communicator or Microsoft Lync with the same account information specified in the SIP settings of your Polycom HDX system.

2   From Office Communicator or Microsoft Lync you can:

   — Add and remove contacts

   — Add and remove groups

   — Move contacts from group to group

Changes made to contacts and groups using Office Communicator or Microsoft Lync appear on the Favorites screen. Polycom HDX systems support up to 200 contacts and 64 groups from Office Communicator or Microsoft Lync.

> Polycom HDX systems do not support Office Communicator or Microsoft Lync distribution list groups, which are created on the Microsoft Exchange Server and are typically used for sending email to a group of people.

Viewing Microsoft Office Communications Server or Microsoft Lync Server 2010 Presence States

The Polycom Touch Control shows the following presence icons for Favorites registered with the Microsoft Office Communications Server or Microsoft Lync Server 2010.

Icon	Presence State	Description
	Do Not Disturb	Indicates that the HDX system or Office Communicator or Microsoft Lync user is set to Do Not Disturb.
	In a Call	Indicates that the HDX system or Office Communicator or Microsoft Lync user is in one of the following states: • In a call • Accepting urgent interruptions only • Busy • Inactive • In a Conference • In a Meeting
	Available	Indicates that the HDX system or Office Communicator or Microsoft Lync user is available.
	Offline	Indicates the HDX system or Office Communicator or Microsoft Lync user is offline.
	Presence Unknown	Indicates that the presence state of the HDX system or Office Communicator or Microsoft Lync user is unknown.

Multipoint Calls Using Centralized Conferencing Control Protocol (CCCP)

If a Polycom HDX system is deployed in a Microsoft Lync Server 2010 environment and Centralized Conferencing Control Protocol (CCCP) is enabled, you can place and participate in multipoint calls that are hosted by Microsoft audio and video servers. If you are used to being in conferences hosted by a Lync server, you will notice that the Polycom HDX interface closely resembles the interface you see in Microsoft environments.

Contact your system administrator and the *Polycom Unified Communications Deployment Guide for Microsoft Environments* for more information about CCCP multipoint calling, which is referred to as Lync Conferencing in that book.

To manually create a multipoint call with CCCP:

1 From the Call screen on the Polycom Touch Control, touch **Conference**.

2 Create a list of participants you want in the call. You can add participants using any combination of the following methods.

   — Touch **Keypad**, then enter SIP addresses. Each time you enter a SIP address, touch **Add** to add it to the list of participants.

   — Touch **Directory**, then touch the names you want to include in the list of participants. If you touch a group, the group opens and you can touch the individual names to add them.

   — Touch **Favorites**, then touch the names you want to include in the list of participants.

3 To initiate the conference call, touch **Join** when your list of participants is complete.

   After you touch **Join**, the In Call screen is displayed on the Polycom Touch Control. You can touch **Add Participant** to add other participants as described in step 2 without putting other participants on hold, although you might experience a brief audio or video pause.

To add participants to a CCCP conference using the Polycom Touch Control:

1 From the Call screen, touch **Add Participant**.

2 Select **Keypad** and enter a number to call, or choose a site from one of the following locations:

   — **Recent Calls** list

   — **Favorites** screen

   — **Directory**

> When you add a group to a CCCP conference, only the first 12 contacts in the group are added to the call.

Muting in a CCCP Call

A Microsoft Lync client acting as the call organizer can mute all of the participants in the call. You cannot unmute until the organizer unmutes the participants unless you are designated as a presenter. If the meeting organizer has muted your Polycom HDX system selectively, you can unmute your system even if the organizer does not. It is important to understand that no one else can unmute your microphone. They can only request that you unmute.

When your mute status changes due to a Microsoft Lync client organizer muting or unmuting all of the participants, notification is displayed on the Polycom HDX system monitor.

Holding and Resuming CCCP Calls

When an HDX system is registered to a Microsoft Lync server, the HDX system can participate in Lync-hosted multipoint calls. You can place calls on hold and resume calls on the HDX system when it is on a Lync-hosted call. Certain restrictions exist:

- Only one call can be on hold at a given time.

- Only SIP calls from the Microsoft server can be placed on hold. You cannot place analog calls or calls using H.323, H.320, V.35, or ISDN on hold.

- If the **Auto Answer Multipoint Video** setting is enabled, you cannot place calls on hold.

To place a call on hold and to resume the call:

>> On the HDX system monitor, select **Hold**.

When a call is on hold, a dialog on your HDX system monitor displays allowing you to resume or add a call:

- **Resume Call:** Allows you to resume your call after you placed it on hold.

- **Add a Call**: Takes you to the **Place a Call** screen.

- **You have been placed on hold** message appears if one of the far sites places you on hold.

To switch between an active call and a call on hold:

>> On the HDX system monitor, select **Call on Hold**.

To hang up with a call on hold:

1 On the Polycom Touch Control call screen, touch **Hang Up.**

2 On the HDX system monitor, choose one of the following:

- **Leave Conference**: Hangs up the active call and causes a **Resume** message to be displayed. To make the call on hold active, click **Resume Call**.

- **Leave All Conferences**: Hangs up all calls.

Customizing Your Workspace

You can customize what you see on the screen, depending on how your system is configured.

Allowing the Far Site to Control Your Camera

If your system administrator has allowed access to user settings, you can allow the far site to control your camera. Far-site participants can also set and use presets for your camera, if their system supports this.

To allow the far site to control your camera:

1 From the Home screen touch **User Settings.**

2 Touch the **HDX System** tab.

3 Under **Camera**, touch **Far Control of Near Camera** to enable the option.

Changing this setting takes effect immediately, even if a call is in progress.

Adjusting for Room Lighting

If your system administrator has allowed access to user settings, you can use the backlight control to adjust the brightness of the video that the main camera sends to the Polycom HDX system. Adjusting this setting can be helpful when the room arrangement results in strong light coming from behind the people in the picture.

Because backlight controls adjust the main camera, these controls do not make content from a computer or a document camera appear brighter.

To turn backlight compensation on:

1 From the Home screen touch **User Settings.**

2 Touch the **HDX System** tab.

3 Under **Camera**, touch **Backlight Compensation** to enable the option.

Allow Room or Call Monitoring with the Polycom HDX Web Interface

To enable room and call monitoring:

1   From the Home screen, touch ![icon] **User Settings**.

2   Touch the **HDX System** tab.

3   Enable **Allow Video Display on Web** under **Meetings** to allow the room or call to be viewed remotely.

Using the Virtual Remote Control

During normal operation, the Polycom Touch Control uses an IP connection to communicate with the HDX system. If this connection is lost for more than 2 minutes, you might see error messages on the HDX system monitor and the Polycom Touch Control screen. You can access a virtual remote control on the Polycom Touch Control that allows you to control the HDX system until the connection is restored. The virtual remote control sends IR signals across the room, so make sure the back of the Polycom Touch Control is facing the HDX system camera.

When the IP connection is restored, the virtual remote control is no longer available.

Polycom Solution Support

Polycom Implementation and Maintenance services provide support for Polycom solution components only. Additional services for supported third-party Unified Communications (UC) environments integrated with Polycom solutions are available from Polycom Global Services and its certified

Partners. These additional services will help customers successfully design, deploy, optimize and manage Polycom visual communications within their UC environments.

Professional Services for Microsoft Integration is mandatory for Polycom Conferencing for Microsoft Outlook, Microsoft Office Communications Server and Microsoft Lync Server 2010 integrations. For additional information and details please refer to http://www.polycom.com/services/professional_services/index.html or contact your local Polycom representative.

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