POLYCOM®

Getting Started Guide
for the VSX™ Series

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Patent Information

The accompanying product is protected by one or more U.S. and foreign patents and all pending patent applications held by Polycom, Inc.

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Getting Started Guide
for the VSX™ Series

When you attend a meeting using the Polycom® VSX system, you'll see that it's very much like any other meeting you attend in a physical conference room:

❑ You see and hear other people and they see and hear you.

Depending on how your system is configured, you can make video calls to one or more sites using ISDN or IP connections.

❑ You can show information to other participants and they can show you information.

You can share different kinds of information from a variety of sources. For example, you can show a paper document or an object on a document camera or a videotape from a VCR. If you have a VSX 7000 or VSX 8000, you can also show documents stored on your laptop or PC.

Before you place your first call with your VSX system, use this guide to get some basic "how-to" information. This guide includes overview information that you may find helpful when you're just starting to learn about the capabilities of the system or when you have experience, but you need a quick refresher.

System Basics

Using the Remote Control

The remote control lets you perform meeting tasks, such as placing a call and adjusting the volume. You can use the remote control to navigate screens and select options.

You can also use the remote control to type text by pressing the number buttons using the text-entry method commonly used with cell phones. For example, to enter a "b", press the number 2 button twice. Alternatively, you can press **Keyboard** and use the on-screen keyboard to enter text.

VSX Series Remote Control

Place or end a call

Open the directory to make a call or work with an entry

Adjust the camera; navigate through menus

Confirm your current selection; perform functions on highlighted items

Return to the Place a Call (home) screen

Return to the previous screen

Increase or decrease the sound you hear from the far sites

Switch between the near-site and far-site camera views

Mute the sound you're sending to the far sites

Zoom the camera image in or out

Show or hide the Picture-in-Picture (PIP)

Turn automatic camera tracking to presets on or off

Store camera positions (when followed by a number); delete all stored camera positions

Select a camera or other video source

Enter a dot in an IP address

Display the onscreen keyboard so you can enter text

Delete letters or numbers

Enter numbers or text; move the camera to a stored position

Start and stop sending content to far sites (VSX 7000, VSX 8000)

Access the online help; see current system status while in a call

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VSX Series Remote Control (VSX 8000)

The remote control that you received with your VSX 8000 system has separate buttons for placing and ending calls. All other buttons are the same as the buttons on the remote controls for the VSX 3000 and VSX 7000.

Place a call   End a call
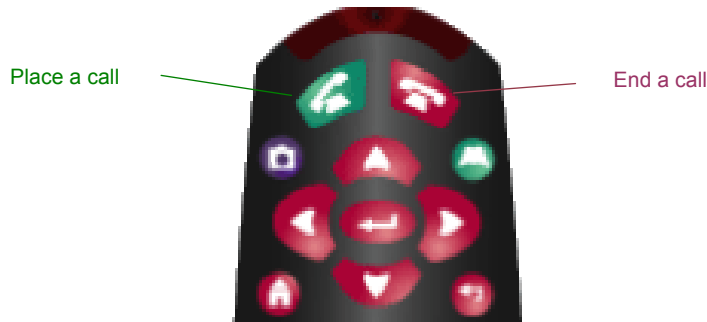
In this guide, general instructions refer to the Call-Hang Up button on the remote control supplied with the VSX 3000 and VSX 7000 systems. Instructions that apply only to the VSX 8000 system refer to the remote supplied with the VSX 8000 system.

Getting More Information

If you need additional information about using the VSX system, try these resources:

❑ To view help while you're using the system, press **Help**.

❑ For network questions, contact your system administrator.

❑ For system questions, contact Polycom Technical Support at www.polycom.com/support.

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Calling and Answering

Answering a Video Call

When a call comes in, you hear a ringing sound, and you may see a message that includes the number of the person calling. If the person is listed in the directory, you'll also see the person's name.

The system administrator configures the system to answer incoming calls in one of these ways:

❑ The system prompts you to answer the calls manually.

❑ The system answers incoming calls automatically.

To answer the call manually:

>> When the system notifies you that a call is coming in, select **Answer** or press **Call-Hang Up** on the remote control.

To answer the call when your system is set up to automatically answer calls:

>> The call connects automatically.

If you see **Near** on your screen, then your system is configured to automatically mute near-end audio when a call comes in. To unmute your system, press **Mute** on the remote control. For VSX 7000 and VSX 8000 systems, you can also press on the microphone.

Placing a Video Call

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

❑ Entering a name or number

❑ Choosing from a list of recently-called sites

❑ Choosing a site from the **Contacts** or **Speed Dial** list on the Place a Call screen, if your system has been configured to have one

❑ Using the directory

Calling by Entering a Name or Number

To place a call by entering a name or number:

1. From the Place a Call screen, enter one of these:
   - The ISDN number (for example, 19784444321).
   - The system name (for example, Ascot Conference Room).
   - The IP address (for example, 255.255.255.255).

   The system automatically determines the type of call to make based on the information you enter.

   To learn about entering characters, see *Using the Remote Control* on page 1.

2. Enter any additional information needed for the call. The available settings depend on the type of call and your system's configuration. Not all calls require these settings:
   - **Call Quality** – Specify the bandwidth for this call. For most calls, choose **Auto** to let the system determine the best quality for the call.
   - **Second ISDN number** – Use two numbers only when the party you are calling instructs you to do so.
   - **Gateway extension** – If you need to dial an extension, enter the extension in the second entry field. If your system is not configured with a second entry field, you can enter the extension when the gateway prompts you.

3. Press **Call-Hang Up** to place the call.

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

Calling from the Recent Calls List

Depending on your system configuration, you may be able to choose a number to call from a list of the sites you have called recently. 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. Select **Recent Calls** from the Place a Call screen.

2. Scroll to the entry you want to call.

3. Press **Call-Hang Up** to place the call.

   To see details about a call listed on the Recent Calls screen, highlight the site name and press **Help**.

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Calling from the Contacts or Speed Dial List

Your system administrator may have customized a Contacts or Speed Dial list for easy calling.

To place a call using the Speed Dial or Contacts list:

1. Select **Speed Dial** or **Contacts** from the Place a Call screen.

2. Scroll to the entry you want to call.

3. Press 📞 **Call-Hang Up** to place the call.

Calling by Using the Directory

The directory is a list of names and numbers that's stored locally on the VSX system.

If the system is registered with a global directory, the directory also includes entries from the global directory. Global entries are marked with 🌐. For both types of entries, the name appears with its corresponding number, IP address, or both.

To place a call from the directory:

1. Press 📖 **Directory** on the remote control.

2. Find the entry to call.

3. Press 📞 **Call-Hang Up** to place the call.

For more information about using the directory, see *Working with Directory Entries* on page 21.

Depending on your system configuration, when you make a call using an entry with both ISDN and IP dialing information, the system may prompt you to choose which way to place the call.

Ending a Video Call

To hang up from a call:

1. Press 📞 **Call-Hang Up** on the remote control.

2. Confirm that you want to end the call.

If you don't confirm that you want to hang up, the system disconnects the call automatically after 60 seconds.

Types of Video Calls You Can Make

You can make either ISDN or IP calls (or both) using the VSX system, depending on your system configuration. You can call systems on ISDN networks, on the same LAN as your system, or on a different LAN from your system. The network used by your system and the far-site system can affect how you dial the call.

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	Same LAN	Alias, E.164 address, or IP address
	Different LAN	Access code of the near-site gateway, the selected speed code, the ISDN number for 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.
	ISDN	Access code of the near-site gateway, the selected speed code, and the ISDN number for the far site.

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 will need to enter into the dialing field. For example, some networks use ## to separate the extension from the IP address.

When you include the extension, you will be given the option of saving both the number and the extension in the directory when the call ends. If you enter the extension after the gateway connects, then you can save only the gateway number when the call ends.

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Placing Audio-only Calls and Adding Audio-Only Sites (VSX 8000)

Depending on the configuration, you can use your VSX 8000 system to place an audio-only call, or you can add an audio-only call to a video conference. This lets you:

❑   Use your system in the same way as a telephone.

❑   Add audio-only participants to your video calls.

❑   Add video calls to your audio-only calls.

> Other audio options are available if your conference room has a VSX video conferencing system integrated with a VTX™ 1000 conference phone.
>
> For more information about using the VTX 1000 conference phone, see *Using the VTX 1000 Conference Phone in Video Calls* on page 32.

Placing an Audio-Only Call

You can use your system to make audio-only calls in addition to using your system to place video calls.

To place an audio-only call from your system:

1. On the Place a Call screen, enter the number you want to call.

    ▪ To place a call within your PBX system, enter the last four digits of the number.

    ▪ To delete a digit, press **Delete** on the remote control.

2. Press **Call** to place the call.

Adding an Audio-Only Call to a Video Call

You can add an audio participant to an existing video call.

> You can add an audio-only call to a video call only if your local telephone company has enabled three-way calling on your line.

To add an audio-only call after your video call connects:

1. Press **Call** on the remote control.

2. Select **Add Call** from the Hang-up screen.

3. Use the number buttons on the remote control to enter the telephone number of the audio participant that you want to add to your video conference.

4. After the audio call connects, press **Near** or **Far** to return to the video conference.

Adding a Video Call to an Audio-Only Call

If you are already in an audio-only call, you can add a video call to your call.

To add a video call after your audio-only call connects:

1. On the Place a Call screen, enter the number you want to call.

2. Press **Call** on the remote control to place the call.

Ending an Audio-Only Call

To hang up from an audio-only call:

1. Press [icon] **Call-Hang Up** on the remote control.

2. Select the audio-only site from the **Hangup** screen to hang up the call.

> If the person on the telephone hangs up first, you need to disconnect the call from the VSX 8000 system, just as you would hang up a telephone receiver in a regular phone call.

Controlling What You See

Adjusting your cameras lets you show conference participants what you want them to see. You can adjust cameras and other video sources before the meeting starts and while the meeting is in progress.

Selecting and Adjusting a Camera or Other Video Source

You can use the remote control to select the main camera or any other near-site or far-site video sources, such as document cameras, laptops, VCRs or DVD players.

You can also use the remote control to adjust the main camera on VSX 7000 and VSX 8000 systems. If you have a VSX 3000 system, you must pan, tilt, and focus the main camera manually. You can also adjust any auxiliary camera or far-site camera that supports pan, tilt, and zoom movement.

> You can adjust the far-site camera only if the camera supports pan and tilt, and the far site system is configured to allow you to control its camera.

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

1. If you are in a call, press **Near** or **Far** to select either a near-site or far-site camera or other video source. The icon on the screen indicates which you can select:

If you see this icon...	You can control this...
	Near-site source
	Far-site source

2. Press **Camera** and then press the number button that corresponds to the camera or other video source you want to select at the near or far site. For example, press **1** to select the main camera.

   The image from the camera or video source you selected appears on the screen.

To adjust a camera using the remote:

1. Press ⊗ **Near** or **Far** to select either a near-site or far-site camera.

2. Press the arrow buttons on the remote control to move the camera up, down, to the left, or to the right.

3. Press ⊕ **Zoom** to zoom out or in.

To adjust the main camera on the VSX 3000 system:

1. Position the camera up, down, to the left, or to the right manually:

2. Focus the camera using the focus wheel:

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Setting and Using Camera Presets

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

With the press of a button, presets let you:

❑ Automatically point a camera at pre-defined locations in a room.

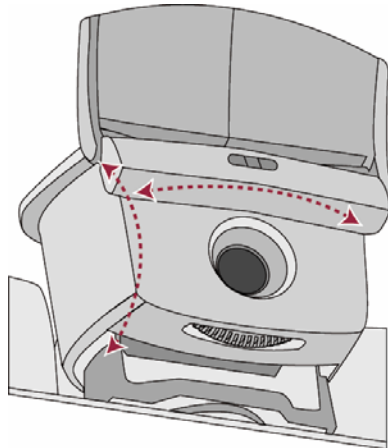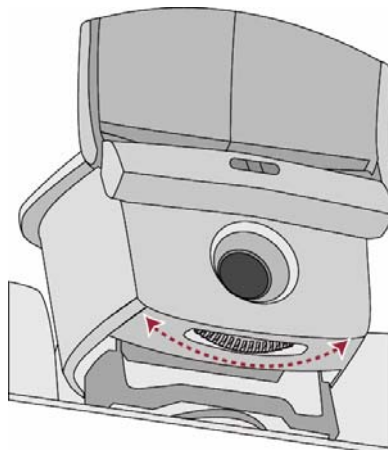❑ Select a video source such as a VCR or DVD player, a document camera, or an auxiliary camera.

If your system's main camera supports pan, tilt, and zoom movement, you can create up to 100 preset camera positions for the near site. Each preset stores the camera number, and its zoom level and the direction it points (if appropriate). Near-site presets remain in effect until you delete or change them. Near-site presets are available for VSX 7000 and VSX 8000 systems.

If the far site allows you to control its cameras, you can create presets to control the far-site camera. These presets are stored on your system and are not available to the far site. You may also be able to use presets that were created at the far site to control the far-site camera, provided that system is designed to use the industry standards for camera presets. Far-site presets are saved only for the duration of the call.

To move the camera to a preset:

1. If a call is connected, press **Near** or **Far** to choose a near-site or far-site camera or other video source. The icon on the screen indicates which source is selected.

2. Press a number from 0 to 99.

   The camera moves to the preset position and the video from the camera or other video source appears on the screen.

To view your near-site presets (VSX 7000 and VSX 8000):

>> Press **Preset**.

   Each numbered icon represents a preset. The colored icons indicate stored camera positions, and the gray icons indicate available presets.

To store a preset:

1. If you are in a call, press **Near** or **Far** to choose a near-site or far-site camera or other video source.

2. If you selected a camera that supports pan, tilt, and zoom, you can adjust the camera's position:

   ▪ Press the arrow buttons on the remote control to move the camera up, down, to the left, or to the right.

- Press **Zoom** to zoom the camera out or in.

3. Press **Preset**.

4. Press and hold a number to store the preset position. To store a double-digit preset (10-99), hold the second number down.

   Any existing preset stored at that number is replaced.

To delete all presets:

1. If a call is connected, press **Near** to choose a near-site video source.

2. Press **Preset**.

3. Press **Delete** to delete all presets.

You cannot delete just one preset. Instead, set a new preset position for the preset you want to delete.

Switching Between Full Screen Video and the Home Screen

Before the call connects, you see the near video in a small window on the Place a Call (Home) screen. When the call connects, the system automatically shows the video in the whole screen. You can switch back to the Place a Call screen during a call, for example, if you need to adjust a user setting, and your system is configured to allow you to do so.

To learn about adjusting user settings, see *Customizing Your Workspace* on page 37.

To see the video in the full screen:

>> Press **Near**.

To see the Place a Call screen:

>> Press **Home**.

Showing, Moving, and Turning Off the PIP

The Picture-in-Picture (PIP) gives you another view of your video conference so that your call is more like a face-to-face meeting. The view shown in the PIP changes automatically, depending on how the system is set up and what is happening in the meeting. You can also exchange the view shown in the PIP with that shown in the main screen.

For example, during a call on a single-monitor system, the PIP displays what your main camera is sending to the far site. (This lets you adjust the camera if you need to.) If one of the sites in the call shows any type of content, the content appears in the main part of the screen, and the PIP changes to show the people at the far site.

During a call on a dual-monitor system, when the participants share content, the monitors show the far site and the content, and the PIP shows the near site.

To show, move, or turn off the PIP during a call:

❑   Press   **PIP** to turn the PIP on.

❑   While the PIP has a yellow border, press   **PIP** repeatedly to move it to different corners of the screen.

❑   After a brief pause, the PIP border turns blue. Then, press   **PIP** to turn the PIP off. The PIP setting remains in effect only for the duration of the call.

To swap the views shown in the PIP and the main screen:

1. If the PIP is not showing, press   **PIP** to turn it on.

2. Press   **Camera** and select the   **Swap PIP** icon.

During calls using a single monitor and the Dual Monitor Emulation feature (split-screen viewing), you can use the PIP button to scroll through the following screen layouts:

1. Near and far sites, same size, side by side

2. Far site big, near site small

3. Near site big, far site small

4. Near site, full screen

5. Far site, full screen

Enabling Voice Tracking to Presets (VSX 8000 Only)

If your system configuration uses the Polycom PowerCam Plus camera, you can set the main camera to automatically move to the preset location that is closest to the speaker. When you enable this voice tracking to presets, you can view the people who are speaking throughout the meeting without having to manually adjust the camera at all. Use this feature if you expect the meeting participants to sit or remain somewhat stationary during the meeting.

To enable automatic voice tracking to camera presets:

1. Press **Near** or **Far** to choose the near-site or far-site camera.

2. Press **Auto** to enable automatic voice tracking to presets.

   The near-site camera icon changes to to let you know that automatic voice tracking to camera presets is enabled.

To disable automatic voice tracking to camera presets:

>> Press **Auto** again.

   The camera icon changes to to let you know that automatic voice tracking to camera presets is disabled.

Automatic voice tracking to camera presets are temporarily disabled when your site is muted as well as when the people at the far site are speaking.

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Controlling What You Hear

Adjusting Volume

During a call, you use the remote control to raise or lower the volume of the sound you hear. Changing the volume affects only the sound you hear at your site.

To adjust the volume:

>> Press **Volume**.

When the VSX 3000 system is in use for video conferencing, use the remote control to adjust the volume. When the VSX 3000 is in use as a monitor for your PC, use the VOL button on the front of the system to adjust the volume.

Muting the Microphone

You can mute the microphone if you do not want the far site to hear what you say. For example, you might mute the microphone if you want to speak to someone privately.

To mute or unmute the microphone:

>> Press **Mute** on the remote control.

For VSX 7000 and VSX 8000 systems, you can also press on the microphone.

Enjoying Stereo Audio in Video Calls

If your video conferencing room is configured to use stereo sound, the microphones are positioned at the end of the conference table nearest the video conferencing system. One microphone pod is positioned on the left side of the table and one on the right.
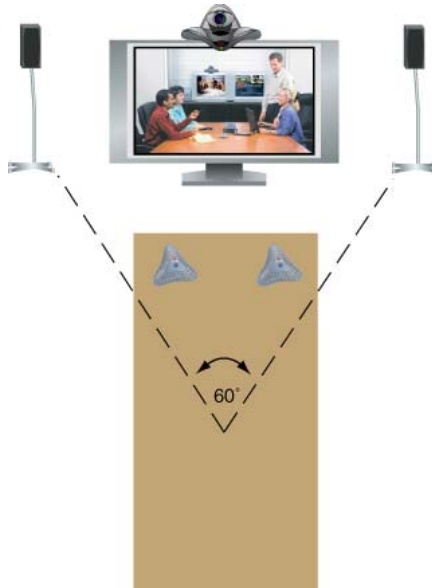
The left and right microphones are configured during system setup. It is important that you do not move them as this may detract from the stereo audio experience.

Stereo audio is only used in video calls of 256 Kbps or higher.

Showing Content and Video Sources

Depending on the equipment you have connected to your system, you may be able to show the following to the far sites:

❑ Any information stored on a laptop or PC (VSX 7000 and VSX 8000 systems)

❑ A paper document or object placed on a document camera

❑ A videotape or DVD

You can share one type of content or one video source at a time, and you can switch to a different type of content or video source if you need to. Participants at other sites can also share content or video sources.

What You See When You Show Content

If your video conference supports dual images, you can see both the people at the far site and any content or shared video source at the same time. This is possible because the system can send and receive two sources of video simultaneously.

In video conferences that do not support dual images, the far sites can only receive one video source over the network. Therefore, they can only see the content. The site sending the content can see the content as well as the other sites because the content is local.

Showing Content from a Laptop or PC

If you have a VSX 7000 with a Visual Concert™ VSX device connected to it or a VSX 8000 system with an Image Share II™ device connected to it, you can attach a laptop or PC and show content that is stored on the computer. If your computer is connected to the LAN, you can also share content from network locations. When you share content from a laptop or PC, the far site sees just what you see on the computer screen.

Before You Begin

Check that the laptop video is configured to use one of these supported resolutions and refresh rates:

Resolution	Refresh rates (Hz)
640 x 480	60, 72, 75, 85
800 x 600	60, 72, 75, 85
1024 x 768	60, 70, 75, 85
1280 x 1024	60

To set the resolution and refresh rate, go to your computer's Display Control Panel.

Showing Content with the VSX 7000 System

To show content stored on a laptop or PC:

1. Connect the laptop to a Visual Concert VSX device:

For more information about using the Visual Concert VSX device, see the *Visual Concert VSX Quick Tips*, available at www.polycom.com/videodocumentation.

2. Press on the Visual Concert VSX unit or press **Graphics** on the remote control.

To stop showing content from a laptop or PC:

>> Press on the Visual Concert VSX unit or press **Graphics** on the remote control.

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Showing Content with the VSX 8000 System

To show content stored on a laptop or PC:

1. Connect the laptop to an ImageShare II device:
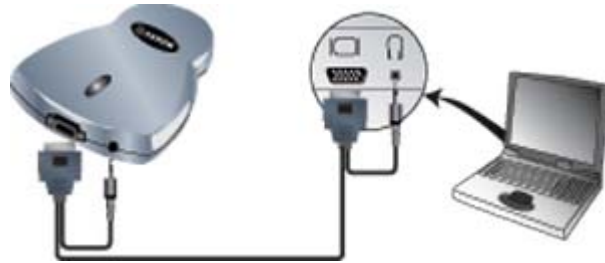
2. Press the blue ImageShare selection button to toggle between displaying Content and displaying People.

Using a Document Camera, VCR, or DVD Player

All VSX systems enable you 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:

1. Make sure the document camera, VCR, or DVD player is connected and powered on.

2. Position your document or object in the document camera or insert the videotape or DVD.

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

1. Press **Camera** on the remote control.

2. Select a video source.

3. Press on the remote control.

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

1. Press **Camera** on the remote control.

2. Select the main camera.

3. Press on the remote control.

Working with Directory Entries

The directory on your VSX system stores dialing information that helps you make calls quickly and easily. When a site listed in the directory calls your system, the system displays the name on the screen when the call comes in. If a site that calls you is not listed in the directory, you are prompted to save the contact information in the directory when the call ends.

If your system is registered with a global directory server, your directory contains two types of entries:

❑ **Local entries:** Information about sites that you have added, sites that you have called, and sites that have called you. These entries are stored locally on your VSX system, and depending on your system setup, you can edit these entries. You can also assign local entries to categories to make it easier to find numbers. Local entries are available to anyone who uses the system.

❑ **Global entries:** Information about other active sites that are registered with the same Global Directory Server. These entries are stored on the global directory server, and you cannot edit them. You can make a local copy if you want to make changes. Global entries are marked with .

Depending on your system configuration, you may also be able to remove or edit names or dialing information in the local directory.

Searching the Directory

You can find entries in the directory by:

❑ Spelling the first or last name using the number buttons on the remote control

❑ Pressing **Keyboard** to use the on-screen keyboard to spell the name

❑ Scrolling through the list of names using the arrow buttons on the remote control

❑ Using the alphabet tabs to move through the directory and then scrolling to the name you want

Adding, Editing, and Deleting Directory Entries

You can create entries for point-to-point calls and multipoint calls and save them in the VSX system's directory. Everyone at your site who uses the system can use the entries you create, and you can use the entries created by others. You can also edit the information in any local entry. Users at other sites cannot access the local entries on your system.

To add a single-site entry to the directory:

1. Press **Directory** on the remote control.

2. Select **New** and specify that this is an entry for one site.

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3. Specify the following information:

In this field...	Enter this information...
Name	Name that will appear in the directory list and on incoming call messages.
Number	ISDN number to use for calling the site.
Call Quality	Call speed to use for ISDN calls to the site.
IP Number	IP address for calls to the site.
Extension	The system's gateway extension.
Call Quality	Call speed to use for IP calls to the site.
Phone Number	Optional contact information for other resources in the conference room.
Mobile Number	
Email	
Category	Designation to help you quickly find the number in the directory.

4. Select **Save** to save the entry.

To add a multiple-site entry to the directory:

1. Press 🔵 **Directory** on the remote control.

2. Select **New** and specify that this is an entry for multiple sites.

3. Add up to three numbers to this multiple-site entry either by:
   - Selecting entries from the directory, or
   - Adding entries manually.

4. Specify a speed for the call. Note that each call in the multipoint conference is placed at the same speed.

5. Select **Save** to save the entry.

6. Enter a name for this entry as you want it to appear in the directory list.

To edit an entry:

1. Press ⬛ **Directory** on the remote control.

2. Scroll to the entry you want to edit and then select **Edit**.

3. Edit the information as needed.

4. Select **Save** to save your changes and return to the directory.

To delete an entry:

1. Press ⬛ **Directory** on the remote control.

2. Scroll to the entry you want to delete and then select **Delete**.

While you can delete entries from your local directory, you cannot delete entries from a global directory.

Categorizing Directory Entries

When you categorize your local entries, you can find calling information quickly by searching just the entries in a category instead of the entire directory.

To create a new category:

1. Press ⬛ **Directory** on the remote control.

2. Select **Category**.

3. Select **Edit Category**.

4. Enter a category name.

5. Press ⬛ **Back** to save the new category.

To delete a category:

1. Press ⬛ **Directory** on the remote control.

2. Select **Category**.

3. Select **Edit Category**.

4. Scroll to the category name you want to delete and then select **Delete**.

When you delete a category, all entries in that category are deleted. If you want to keep these entries, be sure to assign them to a new category before you delete the old category.

Including Multiple Sites in Calls

You can use the VSX system to participate in multipoint conferences. During a multipoint conference, a multipoint conferencing unit (MCU) enables the video to switch between sites so that you can always see and hear the participant who is speaking. You can also share content in a multipoint call, just as you can in a point-to-point call.

About Multipoint Calls

With the VSX system you can make multipoint calls using an external MCU or the internal multipoint option. The type of MCU affects the conference as shown in this table:

This MCU…	Lets you include…	Supports these calls…	Lets you add sites…
Internal MCU	Up to four video sites, including this site	IP, ISDN, or both	Before the call begins, and during the call
External MCU	Number of sites allowed by the MCU	IP, ISDN, or both	Before the call begins, and depending on the MCU and conference type, during the call

For calls using the internal MCU option, the VSX system can initiate the call or the other sites can call the VSX system to join the conference.

Placing a Multipoint Call

How you place a multipoint call depends on whether you're using the internal MCU option or an external MCU. If your organization uses Polycom's PathNavigator™, you can also use PathNavigator's Conference on Demand feature to place multipoint calls.

❑ For calls using the internal MCU option, you can define a multi-site directory entry to call all of the sites at one time. Alternatively, you can place a call to the first site and then add other sites after the first call connects.

❑ For calls using an external MCU, you may need to enter calling information about all of the sites before the call begins. Contact your system administrator for more information.

❑ For calls using PathNavigator's Conference on Demand feature, the system administrator must:

▪ Register the VSX system with PathNavigator.

▪ Configure the VSX system to use PathNavigator for multipoint calls.

- Create a multi-site entry in the directory.

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

1. Call the first site.

2. When the call connects, press 📞 **Call-Hang Up**.

3. Select **Add Video Call,** and place a call to the next site.

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

To place a multipoint call using a multi-site directory entry:

1. Press 🔖 **Directory** on the remote control.

2. Find the multi-site entry in the directory list.

3. Press 📞 **Call-Hang Up** to place the call.

To place a cascaded multipoint call:

1. Place a multi-site call from the Directory, or place calls one at a time to up to three other sites.

2. Ask each site to call up to two additional sites.

Supplying a Password for External MCU Calls

External MCUs sometimes require you to enter a password in order to join a conference. Depending on your system configuration, you can set up the system to enter the meeting password for you.

To configure a meeting password:

1. Select **System** from the Place a Call screen.

2. Select **User Settings** from the System screen.

3. Enter the password in the **Meeting Password** field, either by:
   - Pressing the remote control number buttons, using the text-entry method commonly used with cell phones, or
   - Pressing ⌨ **Keyboard** to use the on-screen keyboard to enter characters

4. Press 🏠 **Home** to save your change and return to the Place a Call screen.

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Setting the Multipoint Viewing Mode

You can choose the way you want to view the sites during a multipoint video conference. For example, you can view all of the sites at the same time, view only the site where the speaker is located, or let the system determine what you see.

To set the multipoint viewing mode:

1. Select **System** from the **Place a Call** screen.

2. Select **Admin Settings** from the **System** screen.

3. Select **Monitors** from the **Admin Settings** screen.

4. Select **Multipoint Setup** from the **Monitors** screen.

5. Scroll to Multipoint Mode and select one of the following settings:

Select...	To do this...
Auto	Allow the system to switch between Discussion and Presentation modes, based on the interaction between the sites. ▪ If more than one site is talking at the same time, the system uses Discussion mode so that all speakers can be seen. ▪ If one speaker talks without interruption for about 15 seconds, the system uses Presentation mode so that all participants can see the speaker can be seen in a larger picture.
Discussion	View all of the sites at the same time, including your own site. This is also known as continuous presence. **Systems with: See this:** Single monitor All sites, each in its own window Dual monitors Speaker on second monitor, all other sites on first monitor
Presentation	View the person who is speaking. This is also known as voice activated switching. The current speaker always sees all sites, each in its own window, on the first monitor. **Systems with: See this:** Single monitor Speaker in full screen Dual monitors Speaker on the first monitor and near site on the second monitor
Full Screen	Enable every site in the call to see the speaker full screen.

Controlling How the System Answers Multipoint Calls

1. Select **System** from the **Place a Call** screen.

2. Select **Admin Settings** from the **System** screen.

3. Select **Monitors** from the **Admin Settings** screen.

4. Select **Multipoint Setup** from the **Monitors** screen.

5. Scroll to the Auto Answer Multipoint field and select one of the following:

Select this...	To do this...
No	Answer calls manually. When a call comes in, you hear a ring, and the system prompts you to accept or refuse the call.
Yes	Answer incoming calls automatically. When a call comes in, you hear a ring, and the call connects.
Do Not Disturb	Refuse incoming calls. Callers hear a busy signal, and you receive no notification about incoming calls.

Using Chair Control for Multipoint Calls

During some multipoint calls, you can use chair control to manage the people 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 MCU in use and the systems in the call determine whether chair control is available.

This MCU...	Allows chair control if...
Internal MCU	The call includes: ▪ VSX systems, ViewStation EX, ViewStation FX, and VS4000 systems connected by IP, ISDN, or both IP and ISDN ▪ Other systems connected by ISDN only
External MCU	Allowed by the external MCU

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

1. On a PC, open a web browser.

2. In the browser address line, enter the system's IP address, for example, http://255.255.255.255, to go to the video conferencing system's web interface.

3. Click **Place a Call**.

4. 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.

5. 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 controls to the selected site	**Release 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 by the MCU	**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**
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 MCU	**Stop Viewing Site**

Changing the Way Calls Are Answered

Your system administrator may have configured the system to let you choose the way incoming calls are handled.

Temporarily Refusing Calls

If you do not wish to be disturbed by calls, you can refuse incoming calls with the Do Not Disturb feature. Callers hear a busy signal and you receive no notification about incoming calls. You can, however, make outgoing calls.

To temporarily refuse incoming calls:

1. On the Place a Call screen, select [icon] in the lower right corner of the screen.

2. Select **On** to set Do Not Disturb.

While the system is not accepting calls, you see [icon] in the lower right corner of the screen. This setting stays in effect until you change it.

Answering Calls Automatically

You can specify whether to answer calls automatically or to have the system announce incoming 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 prevent incoming callers from overhearing a conversation not intended for them, you can choose to mute all automatically answered calls.

To automatically answer calls:

1. Select **System** from the Place a Call screen.

2. Select **User Settings** from the System screen.

3. If you want to automatically answer incoming point-to-point calls, scroll to **Auto-Answer Point to Point**, press [icon], and select **Yes**.

4. If you want to automatically answer incoming multipoint calls, scroll to **Auto-Answer Multipoint**, press [icon], and select **Yes**.

5. Press [icon] **Home** to save your change and return to the Place a Call screen.

If you have a VSX 3000 system that you are using as your PC monitor, Polycom recommends that you set up the system so that you have to answer calls manually.

If you receive a call while using the system as a PC, you hear a ringing sound and you can switch to video to answer the call manually. Alternatively, you can ignore the call and it will not connect, thereby preventing the caller from seeing or hearing you at your desk.

Muting Automatically Answered Calls

If your system is configured to answer calls automatically, you can choose whether to mute the audio when calls connect. This prevents callers from overhearing conversations or meetings. After the call connects, you can press **Mute** when you're ready to unmute the call.

Note that, if you enable this option during a call, the audio for the current meeting is not affected.

To mute automatically answered calls:

1. Select **System** from the Place a Call screen.

2. Select **User Settings** from the System screen.

3. Scroll to **Mute Auto-Answer Calls** and press to enable the option.

4. Press **Home** to save your change and return to the Place a Call screen.

Scheduling Calls

You can use the calendar and call scheduling feature to schedule video conferences. When you schedule a call using this feature, the system automatically calls the site you selected on the date and time you specified. For recurring calls, you can indicate whether you want the system to automatically make the call daily, weekly, or monthly.

To schedule a call:

1. Select **System** from the **Place a Call** screen.

2. Select **Utilities** from the **System** screen.

3. Select **Call Scheduler** from the **Utilities** screen.

4. Select **New Entry** from the **Call Scheduler** screen.

5. Select the directory and then select a single-site or multi-site entry to call.

6. Select the date and time for the call.

7. Select Next and specify whether the meeting recurrs.

On the scheduled time and date, your VSX system will automatically call the selected site.

To view scheduled calls in the calendar:

1. Select **System** from the **Place a Call** screen.

2. Select **Utilities** from the **System** screen.

3. Select **Calendar** from the **Utilities** screen.

Dates with scheduled calls are marked in the calendar with a small green triangle.

Using the VTX 1000 Conference Phone in Video Calls

Your conference room may include a VSX video conferencing system integrated with a VTX™ 1000 conference phone. This configuration lets you use the video conferencing system and the conference phone together to place and manage video and audio-only calls.

Placing a Video Call with the VTX Conference Phone

If your VSX video conferencing system has been configured to work with the VTX conference phone, you can use the conference phone to place video calls.

To place a video call using the VTX phone:

1. On the VTX conference phone, enter one of these:
    - The ISDN number (for example, 19784444321)
    - The IP address (for example, 255.255.255.255).

    To enter a dot in an IP address, press *.

2. Press the **VID CALL** soft key on the conference phone to place the call.

Adding Sites to a Video Call Using the VTX Conference Phone

You can add video or audio-only sites to a video call using the VTX conference phone.

To add video or audio-only sites:

1. Place a video call to the first site using the VTX conference phone or the video conferencing system.

2. On the VTX conference phone, enter the number of the site you want to add.
    - To call a video site, enter the number, and press the **VID CALL** soft key.
    - To call an audio-only site, enter the number, and press the **Call** button on the VTX keypad.

Muting the Audio in a Call that Includes a VTX Conference Phone

You can use the mute button on the VTX conference phone to mute the audio in video calls.

To mute the audio in a call with the VTX conference phone:

>> Do one of the following:

- Press the **Mute** button on the VTX conference phone.

- Press **Mute** on the remote control.

 The red indicator lights on the VTX conference phone show when the audio is muted. The near site mute icon also appears on the TV monitor.

Adding Video to a VTX Conference Phone Audio-only Call

If you are in an audio call with another VTX conference phone and the far site also has a VSX video conferencing system integrated with a VTX conference phone, you can switch from the audio-only call to a video call.

To add video to an audio call:

1. Place a call with your VTX conference phone to the far site's VTX conference phone.

2. When the audio call has connected, press the **ADD VID** soft key on the VTX conference phone.

You hear a ringing sound as the video portion of the call is added. The VTX conference phones are used as microphones for the video call.

Ending a Call

To end a call using a VSX system integrated with a VTX conference phone:

1. Press **Call-Hang Up** on the VSX remote control.

2. On the VSX **Hang Up** screen, do one of the following:

- Select which site to disconnect.
- Choose **Hang Up All** to end the call for all sites.

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Ending a Call with Audio-Only Participants

Your conference may include a mix of video participants and audio-only participants. If an audio-only participant hangs up during the call, you need to disconnect the call from the conference. This is the same as hanging up a telephone receiver in a regular phone call.

To disconnect the audio-only call:

1. Press [icon] **Call-Hang Up** on the remote control.

2. If the call is a multipoint call, select **VTX Conference Phone** from the **Hang Up** screen to clear the audio line.

If you do not disconnect the audio-only call from the VSX system, you will hear a tone from the telephone through the conference.

Streaming a Conference to the Web

Your system may be configured to allow you to stream point-to-point or multipoint calls to the web. When you stream a conference, any number of others can watch the conference's live video or presentation using a web browser.

Starting a Stream

Your system may be configured to allow you to make point-to-point or multipoint calls available for others to view using a web browser. Users who view the stream need to know the address of the video conferencing system and the system's admin password (if any).

To stream a conference:

1. Select **System** from the Place a Call screen.

2. Select **Utilities** from the **System** screen.

3. Select **Streaming** from the **Utilities** screen.

4. Select the **Start Streaming** option to begin streaming.

You can start the stream before or during a video call.

To stop streaming a conference:

1. Select **System** from the Place a Call screen.

2. Select **Utilities** from the **System** screen.

3. Select **Streaming** from the **Utilities** screen.

4. Clear the **Start Streaming** option to stop the stream.

Viewing a Stream

Before you view the streamed conference, you need to:

❑ Install the QuickTime player on your PC.

❑ Obtain the IP address of the video conferencing system and the password (if any) from the conference organizer.

To view a streaming conference:

1. On a PC, open a web browser.

2. In the browser address line, enter the system's IP address, for example, http://255.255.255.255, to go to the video conferencing system's web interface.

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3. Click **Place a Call > Utilities > Streaming**.

4. If prompted, enter the user name and password provided by the conference organizer.

To stop viewing the streaming conference:

\>\> Close the web browser.

Customizing Your Workspace

Your system administrator may have configured the system to let you customize what you see on the screen. You can change these options before you place a call and when the system is in a call.

Allowing the Far Site to Control Your Camera

If you have a VSX 7000 or VSX 8000 system, you can allow the far site to control your camera. This enables the other participants to adjust what they see. 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. Select **System** from the Place a Call screen.

2. Select **User Settings** from the System screen.

3. Scroll to **Far Control of Near Camera** and press [icon] to enable the option.

4. Press [icon] **Home** to save your change and return to the Place a Call screen.

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

Specifying When to Display the PIP

Your system administrator may have configured the default behavior for the PIP in calls. After a call connects, however, you can show, move, or hide the PIP, as needed.

To specify when to display the PIP:

1. Select **System** from the Place a Call screen.

2. Select **User Settings** from the System screen.

3. Select [icon] to see more settings.

4. Scroll to **PIP**, press [icon], and select one of these settings:

Select this setting...	To show the PIP...
Camera	When you press any of the camera control buttons.
Auto	On connection and when you pick up the remote control.
On	On connection and during the call.
Off	Only when you press [icon] **PIP** on the remote control.

5. Press [icon] **Home** to save your change and return to the Place a Call screen.

Displaying the Far Site's Name When the Call Connects

You can specify whether to display the far site's name when the call connects and how long to leave the name on the screen.

To specify when to display the name of the far site:

1. Select **System** from the Place a Call screen.

2. Select **User Settings** from the System screen.

3. Select [icon] to see more settings.

4. Scroll to **Far Site Name Display Time**, press [icon], and select to display the far site's name during the entire call, for a specified time, or not at all.

5. Press [icon] **Home** to save your change and return to the Place a Call screen.

Hearing Audio Confirmation When You Dial

You can set up the system to speak each number as you enter it in the dialing entry field on the Place a Call screen.

To enable audio confirmation:

1. Select **System** from the Place a Call screen.

2. Select **User Settings** from the System screen.

3. Select [icon] to see more settings.

4. Scroll to **Keypad Audio Confirmation** and press to enable the option.

5. Press **Home** to save your change and return to the Place a Call screen.

If Keypad Audio Confirmation is on and you enter a number while in multipoint call using an internal MCU, the far sites will hear the numbers as you enter them. If you do not want the far sites to hear the numbers, mute the MCU's microphone.

Adjusting for Room Lighting

You can use the backlight control to adjust the brightness of the video that the main camera sends to the VSX system. Backlight compensation adjusts the camera's iris to take in less light. 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 will not make content from a laptop or a document camera appear brighter.

To turn backlight compensation on:

1. Select **System** from the Place a Call screen.

2. Select **User Settings** from the System screen.

3. Scroll to **Backlight Compensation** and press to enable the option.

4. Press **Home** to save your change and return to the Place a Call screen.

Setting Camera Brightness (VSX 3000 Only)

If you have a VSX 3000 system, you can set the camera brightness. Like the backlight compensation setting, this setting adjusts the camera's iris. If there is a lot of light in the room, set the camera brightness to a low number so the camera takes in less light. If the room is dark, set the camera brightness to a high number so the camera takes in more light. The default is 11.

To set the camera brightness:

1. Select **System** from the Place a Call screen.

2. Select **User Settings** from the System screen.

3. Scroll to **Camera Brightness**, press , and select the brightness level.

4. Press 🏠 **Home** to save your change and return to the Place a Call screen.

Changing the System Color Scheme

Depending on your system configuration, you may be able to change the color scheme of your VSX system screens.

To change the color scheme:

1. Select **System** from the Place a Call screen.

2. Select **User Settings** from the System screen.

3. Select ➡ to see more settings.

4. Scroll to **Color Scheme**, press ⏎, and select one of the color schemes.

5. Press 🏠 **Home** to save your change and return to the Place a Call screen.

Enabling Dual Monitor Emulation

If you have only one monitor, you may want to set your system for dual monitor emulation (also called split-screen viewing). With dual monitor emulation, you can see both the near and far sites on one monitor.

To enable dual monitor emulation:

1. Select **System** from the Place a Call screen.

2. Select **User Settings** from the System screen.

3. Select ➡ to see more settings.

4. Scroll to **Dual Monitor Emulation** and press ⏎ to enable the option.

5. Press 🏠 **Home** to save your change and return to the Place a Call screen.

There are four different views available with dual monitor emulation. To change the view, press 🔲 **PIP** on the remote control.

Using Your VSX 3000 System as a PC Monitor

If you have a VSX 3000 system, you can save space in your office or conference room by also using the VSX 3000 XGA display as your PC monitor.

Typically, you do not need to change the factory defaults for these settings. However, if you do need to access the monitor settings, use the buttons on the front of the VSX 3000 monitor. Press **MENU**, then press **SELECT** and **ADJUST** as needed to change the settings.

Before You Begin

Check that the laptop video is configured to use one of these supported resolutions and refresh rates:

Resolution	Refresh rates (Hz)
VGA (640 x 480)	60, 72, 75
VGA (720 x 400)	70
SVGA (800 x 600)	56, 60, 72, 75
XGA (1024 x 768)	60, 70, 75
SXGA (1152 x 864)	75
SXGA (1280 x 960)	60
SXGA (1280 x 1024)	60, 75
Macintosh (640 x 480)	67
Macintosh (832 x 624)	75

To use your VSX 3000 system as a PC monitor:

1. Connect your PC to the VSX 3000 system as described in Chapter 2 of the *Administrator's Guide for the VSX Series*.

2. Press the **Input** button on the front of the VSX 3000 system to toggle between displaying content from the PC and showing video from the video conferencing system.

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To answer a call while using the VSX 3000 system as a PC monitor:

1. When you hear a ring, press the **Input** button on the front of the system to switch to the video conferencing system.

    You must answer within 90 seconds, or the system will automatically reject the call.

2. Press **Call-Hang Up** on the remote control.

If you use the VSX 3000 system as your PC monitor, Polycom recommends that you set up the system so that calls must be answered manually. This ensures that callers do not unexpectedly see or hear you at your desk.

When the system is set up for manual call answering, the system rings to indicate an incoming call. To answer the call, switch to the video conferencing system and answer manually. If you do not answer manually, the call will not connect.

Video Conferencing Tips

Read through these quick tips for ideas on how to optimize your video conferencing experience. You'll find general tips for a better meeting, as well as simple suggestions for improving video and audio quality, and for showing documents.

Tips for Great Meetings

❑ Make sure you have the video number(s) of the site you want to call or that the site is listed in a directory.

❑ Set your camera presets before you start your call so that you can quickly use them during the call. (You can set up to 100 near-site presets. Depending on the system you call, you may also be able to use the presets stored on the far-site system.)

❑ Add peripherals to your system to expand its use. For example, you can add a VCR if you want to show a videotape or, for VSX 7000 systems, you can add a Visual Concert VSX if you want to share data from a laptop or desktop PC.

Tips for Great Video

❑ Avoid wearing bright colors, all-light or all-dark clothing, or very "busy" patterns (such as small checks or narrow stripes). Light pastels and muted colors look the best on the screen.

❑ If there are windows in the room, close any drapes or blinds. Daylight is a variable light source and can conflict with interior room lighting.

❑ Use natural gestures when you speak.

❑ When adjusting your cameras during the meeting, try to fill the screen as much as possible with people rather than with the table, chairs, walls, or the floor.

Tips for Great Audio

❑ Speak in your normal voice without shouting.

❑ Ask the people at the other site if they can hear you. Have them introduce themselves so you can be sure that you can hear them.

❑ Since the audio has a very slight delay, you may want to pause briefly for others to answer you or to make comments.

❑ As with any meeting, try to limit side conversations.

VSX 7000 and VSX 8000

❑ Place the microphone on the table in front of the people in the meeting. If your room is very large, consider adding another microphone.

❑ If your video conferencing room is configured to use stereo sound, the microphones are positioned at the end of the conference table nearest the video conferencing system. One microphone pod is positioned on the left

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side of the table and one on the right. The left and right microphones are configured during system setup. It is important that you do not move them as this may detract from the stereo audio experience.

❏ Don't place papers or other objects on or in the way of the microphone, and don't rustle papers or tap on the microphone or table.

Tips for Showing Documents (VSX 7000 and VSX 8000)

❏ If you have a VSX 7000 system that includes the Visual Concert VSX, or a VSX 8000 system that includes the ImageShare II, you can attach a laptop or a desktop PC to your system. You can then show documents that are stored on the laptop or PC to the other people in the conference.

❏ Check that your system has the application you need to show your documents, such as Microsoft® PowerPoint, Project, or Word.

❏ For a smoother presentation, be sure your document is open and ready to show before you start the video call.

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