



# Video Conferencing Equipment Guide



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**Disclaimer:**

This user guide is intended to be a 'general' reference guide to aid in troubleshooting Polycom video conference issues that arise at the local level. The different Polycom models currently in use are too vast and varied for this guide to be used specifically as a step-by-step instruction set for training or troubleshooting purposes. Your particular model of Polycom unit may require a slightly different set of steps than the ones represented in this reference guide.

When available, **always** use the user guide that is specific to your model of hardware and software in place of this reference guide.

You may search for documentation on your particular model of Polycom video conferencing unit at the following web site:

<http://www.polycom.com/support/video/index.html>

# 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 location calling. If the location is listed in the directory, you'll also see the location's name.

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

- 1) The system prompts you to answer the calls manually.
- 2) The system answers incoming calls automatically.
  - Typically, your system will be configured to answer incoming calls automatically.

### To answer the call manually:

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

## Mute



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If you see this icon  on your screen, your system may be configured to automatically mute near-end audio when a call comes in. To un-mute your system, press  **Mute** on the remote control. Or, you may also press the red mic button  on your tabletop microphone. When the red light turns green or no longer displays red, you may begin speaking. Remember: **Red = Mute**.

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## Placing a Video Call

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

- 1) Entering a name or number
- 2) Choosing from a list of recently-called sites (if available)
- 3) Choosing a site from the **Contacts** or **Speed Dial** list on the Place a Call screen, if your system has been configured to use this feature
- 4) Using the Directory (Address Book)

## Calling by Entering a Name or IP Address

### To place a call by entering a name or number:

- 1) In the dialing field, enter the dialing information. Depending on the capabilities of your system and the system you are calling, the dialing information will look like one of these samples:
  - The IP address (for example, 165.234.136.105)
  - H.323 Alias Name (for example, itd3.bismarck)



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

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- 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** – For most calls, choose **Auto** to let the system determine the best quality for the call.
  - **Gateway extension** – For most calls, this should not be necessary. 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** on the remote control 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 (if available)

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** to place the call.



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To see more details about a call listed on the Recent Calls screen, highlight the call and press  **Help** on the remote control.

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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 Contacts or Speed Dial 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** to place the call.

## Calling by Using the Directory

The directory or address book is a list of names and numbers that are stored locally on some Polycom systems. If the system is registered with a global directory, it may also include entries from the global directory server. Entries appear with corresponding IP addresses or H.323 alias names as well.

### To place a call from the directory:

- 1) Press  **Directory** or navigate to the **Address Book** with the remote control.
- 2) Find the entry to call
- 3) Press  **Call** to place the call.



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By default, the systems are configured to use IP dialing.

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For additional information about the Directory, see Working with the Polycom Directory (Address Book) in this manual.

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## Ending a Video Call

### To hang up from a call:

- 1) Press  **Hang Up** or  **Call-Hang Up** on the remote control.
- 2) Confirm that you want to end the call.



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

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# Multipoint Calls (internal MCU)

## Placing a Multipoint Call

Some Polycom units are equipped with an internal MCU (Multipoint Control Unit) that allows the endpoint to connect up to three more additional sites (4 total) without the use of an external MCU or bridge.



Multipoint capability is optional and **most systems are not equipped** with an internal MCU. Multipoint calls will typically require the use of an external MCU. See Support and Scheduling (MCU Call) in this manual.

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**If your system is equipped with an internal MCU, you can place multipoint calls in several ways.**

- Place a call, then add more sites to that call by pressing  **Call** on the remote control, selecting **Add Video Call**, and place a call to the next site. Repeat until all sites are connected.
- Select **Multipoint** from the Home screen if your system is configured to display that button. Enter the names of the sites you want to call by using the Directory or by manually entering the phone numbers of the sites. Press  **Call**.
- Press  **Directory** or navigate to the **Address Book** with the remote control, find a multiple site entry in the directory list, and press  **Call** on the remote control.

# Camera Controls

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. You can adjust the pan, tilt and zoom of local and far end cameras if you are in a point-to-point call and if both systems are Polycom units (other brands may not work).



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

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## **Pan and tilt**

Adjusting the pan or tilt of a camera is done with the use of the arrow keys on the remote control. The camera will pan, tilt or zoom only when the camera icon appears on-screen facing toward local viewers in the top right corner of the main menu.

	If you see this, you can control a near-site camera or video source
	If you see this, you can control a far-site camera or video source

## **Near End Camera Control**

1. Press the  **NEAR** button on the remote
2. Use the arrow keys to move the camera around the room.
3. **Zoom +/-** will zoom the camera in and out
4. The **Near End** is always **your** video location.

## **Far End Camera Control**

(Far end camera control will be available if the video call is point-to-point and both units are Polycom.  
NOTE: All far end controls require you to be in a call.)

1. Press the  **FAR** button on the remote.
2. Use the arrow keys to move the camera around the room.
3. **Zoom +/-** will zoom the camera in and out.
4. The Far End is always the **remote** video location.
5. When the camera icon on the TV monitor points away from you, **Far End camera** control is enabled.

## Setting and Using Camera Presets

Camera presets are stored camera positions that you can create ahead of time or during a call and they will automatically point a camera to a pre-defined location in a room.

If your system's main camera supports electronic pan, tilt, and zoom movement, you can create many preset camera positions for the near site. Each preset stores the camera number, its zoom level, and the direction it points (if appropriate). Near end presets are available on many Polycom systems. They remain in effect until you delete or change them.

### To move the camera to a preset:

1. If a call is connected, press  **Near**.
2. Press a number from 0 to 9.

The camera moves to the preset position for the camera or other video source.

To view your near end presets (VSX room systems only):

Press  **Preset** on the remote control.

Icons for presets 0-9 are shown on the screen. 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** to choose a near end camera or other video source.

If you selected a camera that supports electronic 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 in or out.

Press  **Preset** on the remote control.

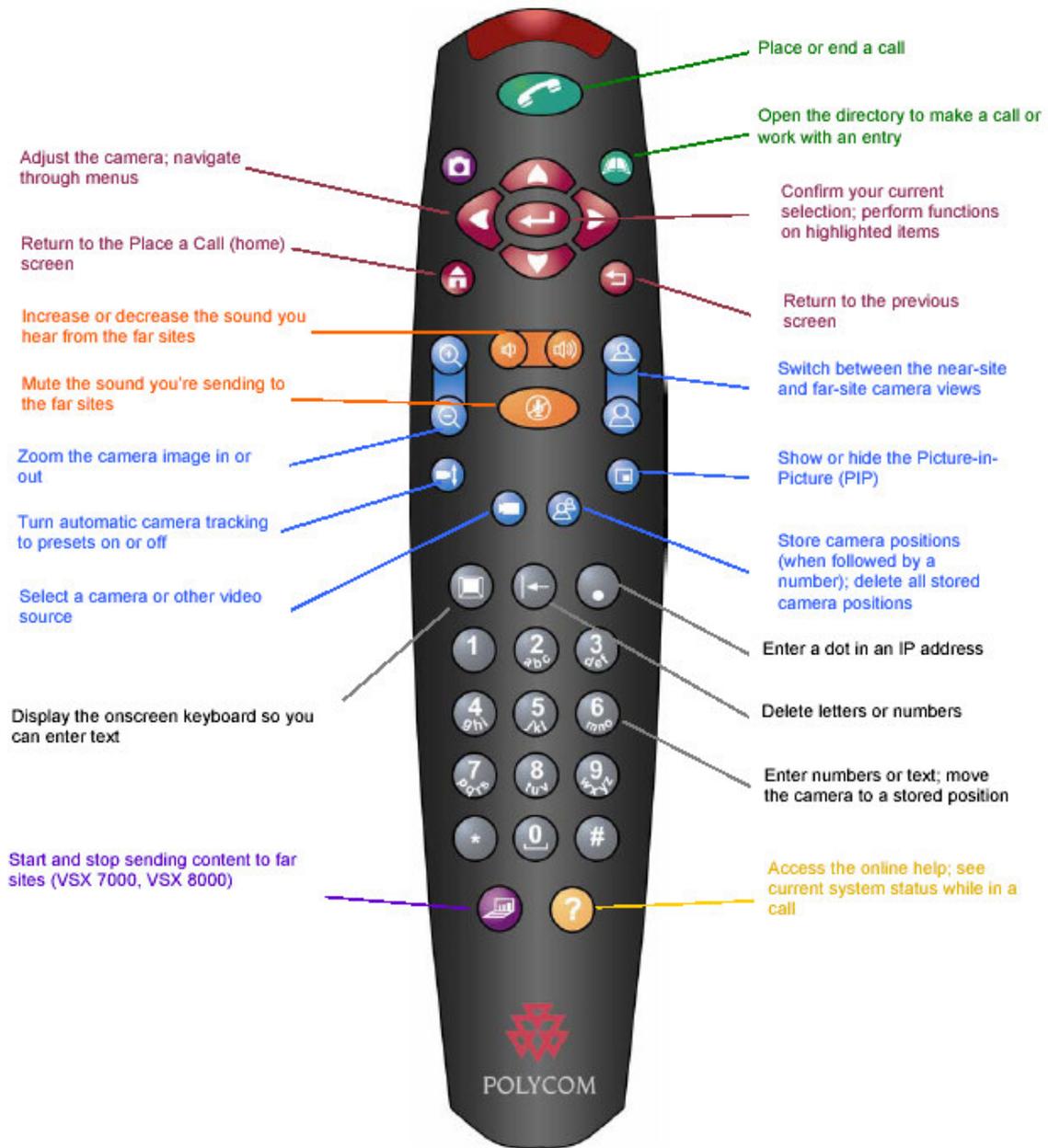
Press and hold a number to store the preset position (0-9).

Any existing preset stored at the number you enter is replaced.

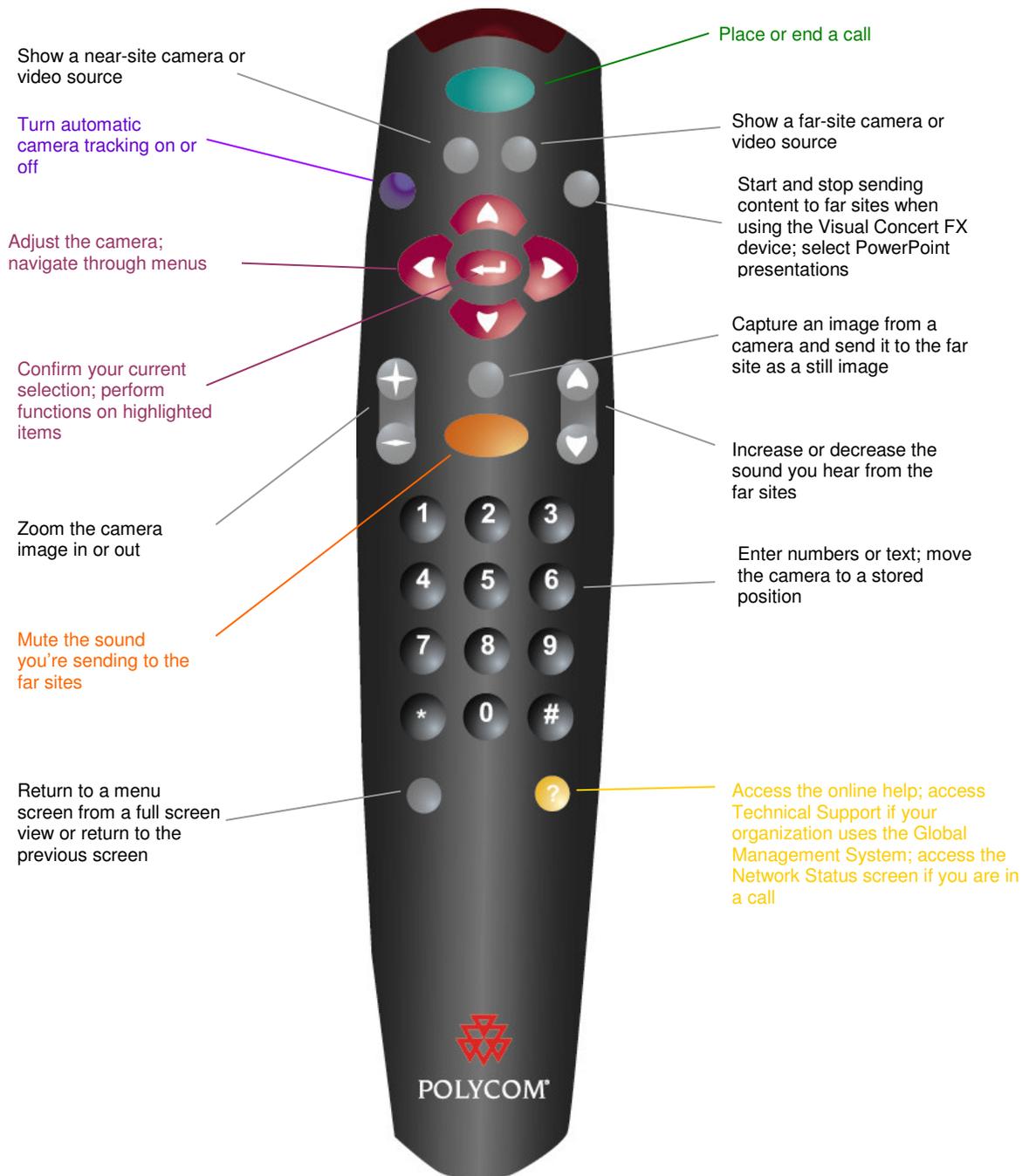
### To delete all presets:

1. If a call is connected, press  **Near** to choose a near-site video source.
2. Press  **Preset** on the remote control.

## VSX Series Remote Control



## Remote Control Diagram - ViewStation (older style)



## Showing Content and Video Sources

You may be able to show the following to the far sites depending on the equipment and capabilities of your Polycom system:

- ❑ Any information stored on a laptop or PC
- ❑ A paper document or object placed on a document camera
- ❑ A videotape or DVD

### **What You See When You Show Content**

If your video conference system supports Dual Monitor Emulation, 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 Polycom unit with a Visual Concert 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 a local area network, 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.

### **Showing Content with the Visual Concert:**

Connect the laptop to a Visual Concert device:





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For more information about using the Visual Concert VSX device, see the *Visual Concert VSX Quick Tips*, available at [www.polycom.com/vidoeodocumentation](http://www.polycom.com/vidoeodocumentation).

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### To start showing content using a Visual Concert

1. Press  on the Visual Concert or press  **Graphics** on the remote control.

### To stop showing content using a Visual Concert:

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

### Using a Document Camera, VCR, or DVD Player

Most Polycom 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.

The  **Camera** button on the remote control allows you to select which input is to be used (for older systems press  **Near**). After pressing the **Camera** button, press the number or use the arrow keys to select any other video source at the near end. For example, press **1** to select the main camera. The image from the camera or video source you selected appears on the screen.

#### **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 (or press  **Near**).
2. Select the appropriate video source with the arrow keys.
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 (or press  **Near**).
2. Select the main camera.
3. Press  on the remote control.

# Working with the Polycom Directory (Address Book)

The directory or address book on your Polycom 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 system, and depending on your system setup, you can edit these entries. 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 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 a local entry.

### 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.
3. Enter the information requested from the screen prompts.
4. Select **Save** to save the entry.

# **Troubleshooting Tips**

## **No Audio - Sent or Received**

- Make sure monitor volume is turned up.
- Make sure microphone pod is not muted.
- Turn up volume on remote control.
- Check to make sure external microphone connections are secure.

## **Audio Feedback**

- Keep microphone pod away from TV monitor speakers
- Far end site should turn volume monitor down - it should be set at around 50%

## **Video Problems - No Video, Interference or Freeze-ups**

- Make sure monitor is turned on and the right video input is selected
- Make sure correct camera source is selected
- Make sure connections are secure on back of system.
- Disconnect and re-dial the far end site
- Reboot the video unit

## **Other Tips**

- Check and replace the batteries in the remote control periodically
- Look for the "green" **IP** and **GK** icons when booting up the video unit. If they are not there, reboot and try again.
- If all else fails, contact the ITD Service Desk (see next page) for assistance.

## Support and Scheduling (MCU call)

Call the ITD service desk if you would like to schedule a multipoint video conference with multiple endpoints hosted on an MCU (Multipoint Control Unit).



## Video Conferencing Customer Service & Support

Information Technology Department (ITD) supports video conferencing events hosted by: state agencies, political subdivisions, and K-12 schools.

For customer service & support (problems, inquires, questions and scheduling assistance), contact the **Service Desk**, and submit an incident. The following methods are available 24 x 7.

- Call: **701-328-4470** or **877-328-4470**
- Online: <https://www.nd.gov/itd/support/selfservice/createincident.aspx>

Please provide the following information when submitting the incident.

- Your name,
- Site name and location(i.e. room #),
- Description of the problem,
- Name of Event and Reservation number,
  - If unknown, please state start time and end time of meeting
- Call back number

*Example: This is John Doe from the Center High School Technology Room. We need Mandan High School Tech Room connected to our event entitled "New Student Orientation". It is reservation #1650. My call back number is (701) 555-0000.*

### Service Support Hours:

- Support will be provided 24 X 7.
  - Business hours (7am – 5pm), Monday through Friday: provided by the Service Desk.
  - After 5pm, Monday through Friday: provided by ITD's Operational Team. They will assist with these calls.
  - On-Call weekends & holidays: provided by the Service Desk. Phone calls and online submissions are monitored. Phone messages are logged by an automatic system that will alert/page the on-call Service Desk Analyst.

## **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.

### **Video Etiquette**

Good video conferencing etiquette is really just common courtesy and respect for the people in your meeting. Read through these tips for successful conferencing.



- Introduce all conference participants when the meeting starts.
- Introduce yourself when you start speaking.
- Make sure that you can see and hear the far-site participants.
- Adjust your camera and microphone so that the far site can see and hear you.
- Place the microphone between the monitor and the people closest to the monitor.
- Avoid tapping on the microphone or rustling papers near the microphone.
- Mute the microphone before moving it so that the far site doesn't hear you moving it.
- Speak in your normal voice without shouting.
- In a multipoint call, mute your microphone when you are not speaking.