

Getting Started Guide

for ViewStation EX, FX, and VS4000



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Getting Started Guide for ViewStation EX, FX, and VS4000

When you attend a meeting using a Polycom ViewStation video conferencing 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. You can also show documents stored on your laptop or PC.

Using This Guide

Before you place your first call with your Polycom ViewStation system, use this guide to get some basic "how-to" information. Refer to these sections for this basic type of information:

For information about how to...	See...
Answer a video call manually or automatically	<i>Answering a Video Call</i> on page 6
Place a video call by using the address book, by entering a name or number, or by using the speed-dial list	<i>Placing a Video Call</i> on page 7
Hang up from a video call	<i>Ending a Video Call</i> on page 9
Make a telephone call with your system, add a telephone call to a video call, or add a video call to a telephone call	<i>Placing a Telephone Call</i> on page 9
Hang up from a telephone call	<i>Ending a Telephone Call</i> on page 11

This guide also 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. Refer to these sections for this type of information:

For information about how to...	See...
Use the new or original remote control	<i>Using the Remote Control</i> on page 3
Select and adjust a camera or another video source, set camera presets, switch between the main and full screen, use the PIP, enable automatic voice tracking, or send snapshots	<i>Controlling What You See</i> on page 13
Change the volume or mute the microphone	<i>Controlling What You Hear</i> on page 20
Show content from a laptop, document camera, VCR, or DVD player	<i>Showing Content</i> on page 21
Add, edit, or delete an entry in the address book	<i>Working with the Address Book</i> on page 30
Place a call that includes multiple sites, supply a multipoint password, or set the multipoint viewing mode	<i>Including Multiple Sites in Calls</i> on page 33
Refuse incoming calls, answer calls automatically, or mute automatically answered calls	<i>Changing the Way Calls Are Answered</i> on page 40
Change how your system looks or behaves, such as whether or not you let the far site move your cameras	<i>Customizing Your Workspace</i> on page 42
Get the most out of video conferencing	<i>Video Conferencing Tips</i> on page 45

System Basics

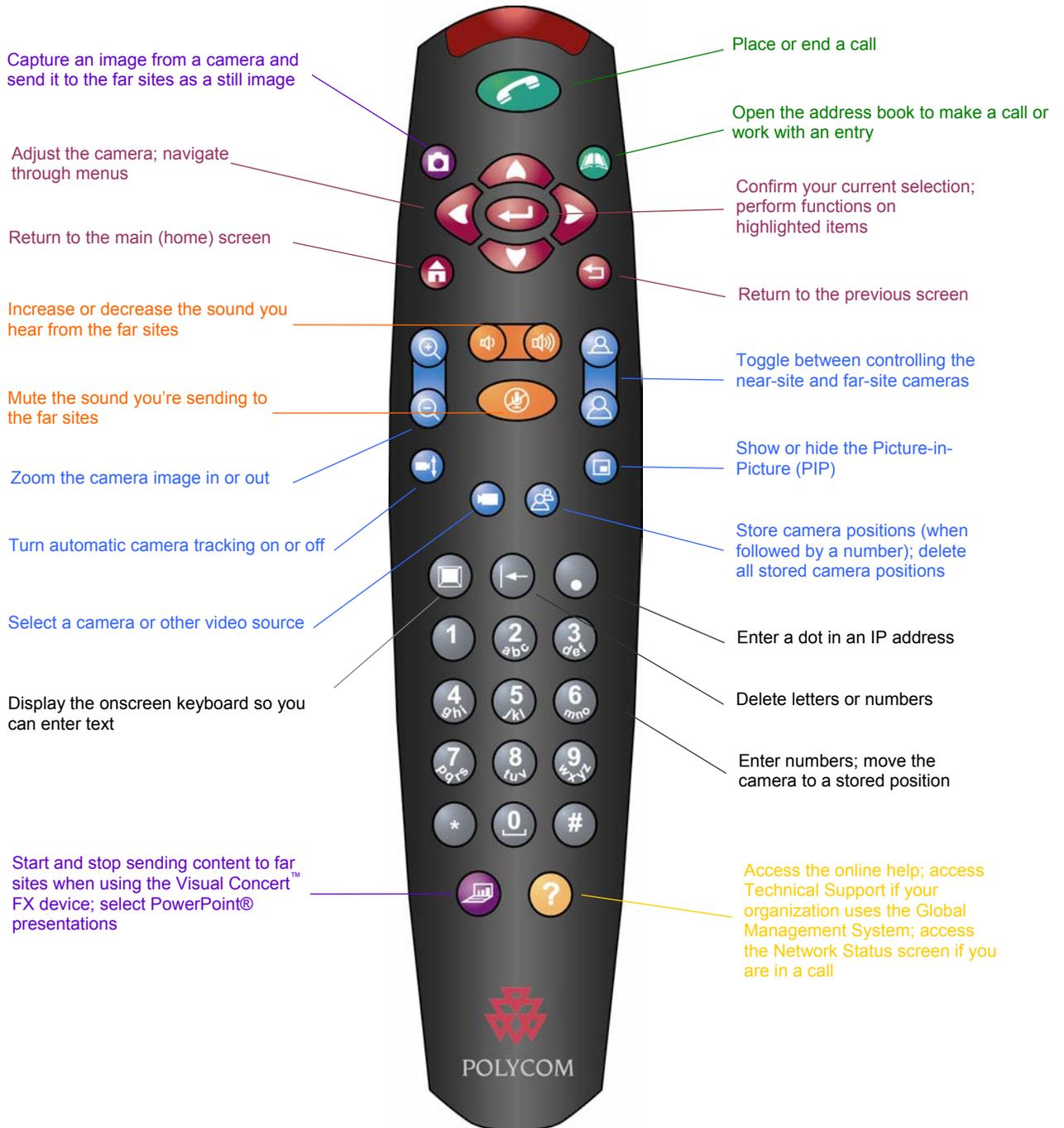
Using the Remote Control

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

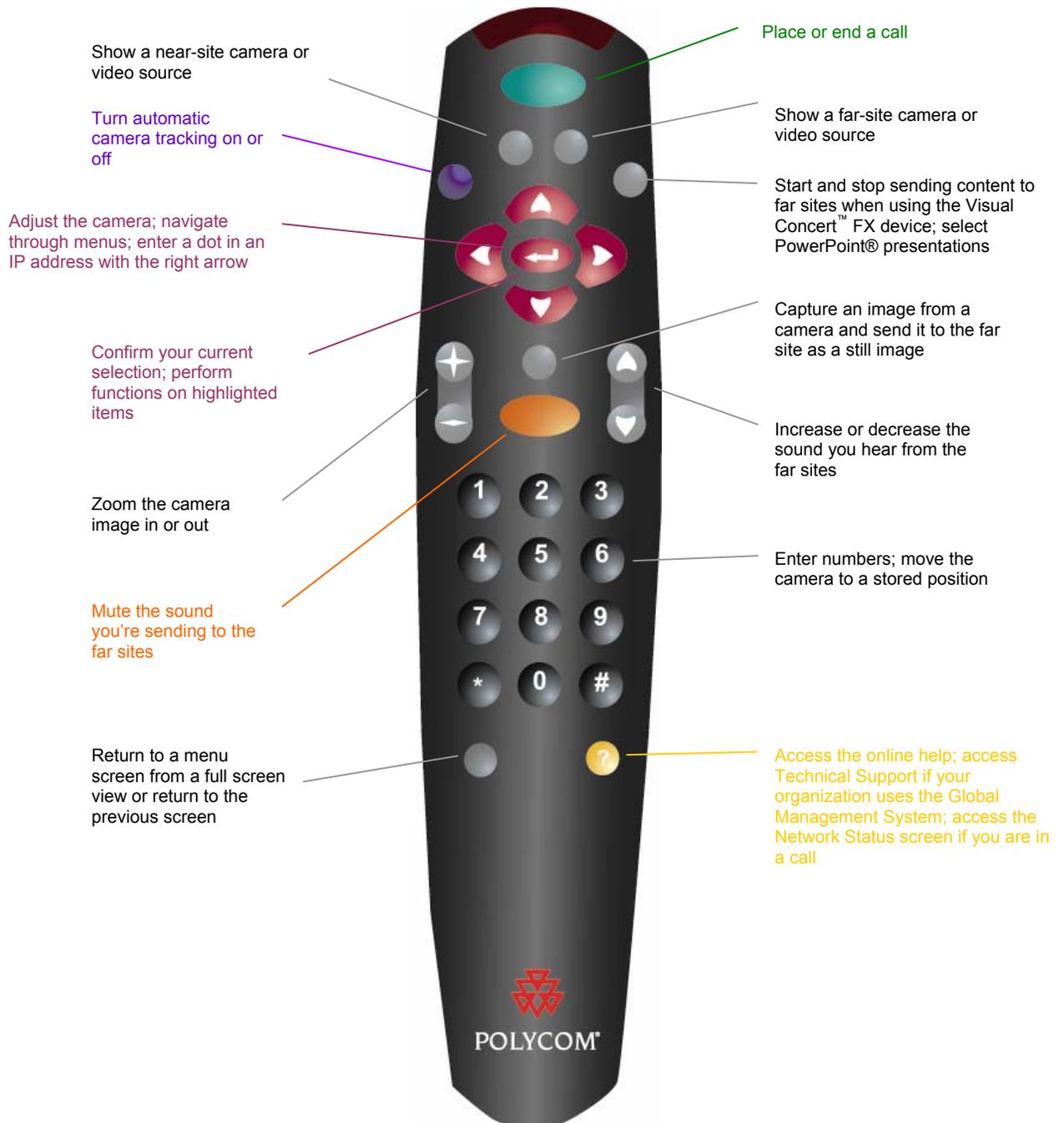
ViewStation systems now come with the remote control shown on page 4. Throughout this document, the instructions refer to the buttons on this remote control.

If you use the older version of the remote control, refer to the illustration on page 5.

New ViewStation remote control



Original ViewStation remote control



Getting More Information

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

- ❑ To view the help while you're using the system, press  **Help**.
- ❑ For system or network problems, contact your system administrator.

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 address book, 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 **Yes** or press  **Call•Hang Up** on the remote.

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

>> You do not need to do anything. (The call connects automatically.)



If you see  **Mute** on your screen, then your system is muted. It may be configured to automatically mute near-end audio when a call comes in. To unmute your system, press  **Mute**.

If you want to change the way your system handles incoming calls, see *Changing the Way Calls Are Answered* on page 40.

Placing a Video Call

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

- ❑ Using the system's address book
- ❑ Entering a name or number
- ❑ Choosing from a list of frequently-called sites

Calling by Using the Address Book

The address book is a list of names and numbers that's stored on the ViewStation system. If the system is registered with a global address book, the address book also includes entries from the global address

book. Global entries are marked with . For both types of entries, the name appears with its corresponding number, IP address, or both.

When a call ends, you can save the call information to the local address book. This information is then available to all other users of the system. Depending on your system configuration, you may also be able to remove or edit names or calling information in the local address book.

To place a call from the address book:

1. Press  **Directory** on the remote control. Or select **Address Book** from the main screen, and then select **Address Book** again.
2. Use the arrow buttons on the remote control to scroll through the list of names in the address book.

You can also use the alphabet tabs to move through the address book and then scroll to the name you want.

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



When you make a call using an entry with both ISDN and IP calling information, the system may prompt you to choose which to use for the call, depending on how you have set your dialing preferences.

Calling by Entering a Name or Number

To place a call by entering a name or number:

1. Select **Video Call** from the main screen.
2. In the Video Phone screen, enter one of these:
 - The ISDN number (for example, 19784444321)
 - The IP address (for example, 255.255.255.255).
 - The system name (for example, Ascot Conference Room). To enter text, press  **Keyboard** on the remote control to access the onscreen keyboard. On older remotes, press  **Auto**.

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



If you make a mistake while entering a number, press  **Delete** on the remote control (left arrow  on remote controls that do not have a **Delete** button), or select the **Clear** button on the screen to clear the field.

3. 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 required 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.
4. 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 by Using the Speed-Dial List

Depending on how the system administrator has configured the system, you may be able to place a call by choosing from a speed-dial list. The speed-dial list displays the calling information of the last six sites called by the system.

To place a call using the speed-dial list:

1. Select **Speed Dial** (if it is present) or **Address Book** from the main screen.
2. Press the speed-dial number of the site you want to call. For example, to call the second site on the speed-dial list, press **2** on the remote control.



You can lock an entry so that it always appears on the speed-dial list. To lock an entry, scroll to the entry and press **#** on the remote control. To unlock the entry, scroll to the entry and press **#** again.

Ending a Video Call

To hang up from a call:

1. Press  **Call•Hang Up** on the remote control.
2. Select **Disconnect Video Call** from the Call Hangup Choices screen.



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

3. If the number you called is not in the address book, a dialog box asks if you want to enter the number. Select **Yes** to enter the number or select **No** to return to the main screen.

Placing a Telephone Call

In countries where it is permitted, you can connect an analog telephone line to your ViewStation system. This lets you:

- Use your system as a telephone.
- Add audio participants to your video calls.
- Add video calls to your telephone calls.

Using Your System as a Telephone

In addition to using your system to place video calls, you can use it to make ordinary telephone calls.

To place a telephone call from your system:

1. Select **Call Type > Telephone** from the main screen.
2. 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. On remote controls that do not have a **Delete** button, press  **Left**.
 - To delete an entire phone number, select **Clear** on the screen.
3. Press  **Call•Hang Up** to place the call.

Adding a Telephone Call to a Video Call

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



Adding a telephone call to a video call is only supported if you have enabled three-way calling from your local telephone company.

To add a telephone call after your video call is connected:

1. Press  **Call•Hang Up**.
2. Select **Add Telephone** from the Call Hang-up Choices 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.

The system calls the audio participant.

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

Adding a Video Call to a Telephone Call

If you are already in a telephone call, you can add a video call to your telephone call.

To add a video call after your telephone call is connected:

1. Select **Video Call** from the main screen.
2. Use the number buttons on the remote control to 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. On remote controls that do not have a **Delete** button, press  **Left**.
 - To delete an entire phone number, select **Clear** on the screen.
3. Press  **Call•Hang Up** to place the call.

Ending a Telephone Call

To hang up from a telephone call:

1. Press  **Call•Hang Up**.
2. Select **Disconnect Telephone Call** from the Call Hangup Choices screen.

Types of Calls You Can Make

You can make either ISDN or IP calls (or both) using the ViewStation system, depending on how your system administrator has configured the system. 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 far site's number. Or wait until the gateway prompts you for the extension.
IP	Same LAN	Alias, E.164 address, or IP address
	Different LAN	Gateway prefix, phone number for the far-site gateway, and the extension (E.164 address) of the far site. Enter the extension after the far site's number. Or wait until the gateway prompts you for the extension.
	ISDN	Gateway prefix and phone number



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. Use ## to separate the extension from the IP address. When you do this, you will be given the option of saving both the number and the extension in the address book 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.

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 use the remote control to select and adjust the main camera as well as auxiliary camera 4 if it supports pan, tilt, and zoom movement. If the far site is configured to allow you to do so, you can also select and adjust the far-site camera.

You can also select other near-site or far-site video sources, such as document cameras, laptops, VCRs, or DVD players, but you cannot use the remote control to adjust them.

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 a far-site camera or video source. The icon on the screen indicates which you can select.

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

2. Press the number button that corresponds to the camera or other video source you want to select.

Press this remote control button...	To select this...
1	Main camera
2	Document camera
3	VCR or DVD player
4	Auxiliary pan/tilt/zoom camera

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

3. 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.

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 laptop, a VCR or DVD player, a document camera, or an auxiliary camera.

You can create up to 10 preset camera positions. Each preset stores the camera number, its zoom level, and the direction it points. Near-site presets remain in effect until you delete or change them.

If the far site allows you to control its cameras, you can also create presets to control the far-site camera. These presets are stored on your system and are not available to the far site. In addition, you may also be able to use presets that were created at the far site to control the far-site camera, if that system is designed to use the industry standards for camera presets.

To view your presets:

>> Press  **Preset**.

Each numbered icon represents a preset. The yellow icons indicate presets that already have stored camera positions; the gray icons indicate presets that do not have stored positions.

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**. On remote controls that do not have a **Preset** button, press  **Select**.
4. Press a number from 0 to 9 to store the preset position. Any existing preset stored at that number is replaced.

To move the camera to a preset:

1. If a call is connected, press  **Near** or **Far** to control the near-site or far-site camera. The icon on the screen indicates which is selected.
2. Press a number from 0 to 9.
The camera moves to the preset position and the video from the camera appears on the screen.

To delete all presets:

1. If a call is connected, press  **Near** or **Far** to choose the near-site or far-site camera.
2. Press  **Preset**. On remote controls that do not have a **Preset** button, press  **Select**.
3. Press **#** 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 the Main Screen and the Full Screen

Before the call connects, you see the near-site video in a small window on the main screen. When the call connects, the system automatically shows the video in the whole screen, hiding the main screen. You can switch between these views at any time, even during a call.

To see the video in the full screen:

>> Press  **Near**.

To see the main screen:

>> Press  **Home**. On remote controls that do not have a **Home** button, press  **Menu**.

Working with the PIP

The Picture-in-Picture (PIP) gives you another view of your video conference. What the PIP displays depends on how the system is set up and what is happening in the meeting.

Here are some examples of what you can expect to see in the PIP:

- ❑ During a call on a single-monitor system, the PIP displays the camera view at the near end. (This lets you adjust the camera if you need to.)
- ❑ During a call on a single-monitor system, if a site shows content, such as a slideshow presentation, the content appears in the main part of the screen and the PIP changes to show the people at the far end.
- ❑ During a call on a dual-monitor system, if a site shows content, one of the monitors shows the content, the other monitor shows the camera view at the far end, and the PIP shows the camera view at the near end.



If the system has been configured with the PIP option set to **Off**, you will not be able to turn it on during a call.

To turn the PIP on or off during a video call:

- ❑ If the PIP is not showing, press  **PIP** to turn it on.
- ❑ If the PIP is showing, press  **PIP** to turn it off.

On remote controls that do not have a **PIP** button, press  **Near**.

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. On remote controls that do not have a **PIP** button, press  **Near**.
2. Press  **Camera**. Skip this step if your remote control does not have a **Camera** button.
3. Select the  **Swap PIP** icon.

Enabling Automatic Voice Tracking (ViewStation EX and FX only)

You can set the main camera on your system to automatically point at whoever is speaking. When you enable this automatic voice tracking feature, you can view the people who are speaking throughout the meeting without having to manually adjust the camera at all.

You can also enable automatic voice tracking to camera presets. This feature automatically moves the camera to the preset location that is closest to the speaker. Use this feature if you expect the meeting participants to sit or remain somewhat stationary during the meeting.

To enable automatic voice tracking:

>> Press  **Auto**.

The near site camera icon changes to  on the screen to let you know that automatic voice tracking is enabled.

To disable automatic voice tracking:

>> Press  **Auto** two more times.

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

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** twice 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 and 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.

Sending Snapshots

You can send a still image from any of your cameras to the participants in the video conference. You can also send an image from other attached video sources, such as a document camera, VCR, or laptop.

To send a snapshot:

1. Press  **Near** or **Far** to select either a near-site or a far-site camera or video source.
2. Press  **Snapshot**.
3. Press the number button that corresponds to the camera or other video source you want to select.

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

4. If you selected the main camera or an auxiliary 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.

5. When you are ready to take and send the snapshot, press  **Snapshot** again.

The image appears on both the near-site and far-site monitors.

6. To remove the snapshot from the screen, press  **Snapshot** again or wait until the time-out period expires.



By default, snapshots are displayed for four minutes. After this, the system returns to live video. The system administrator can change the time-out period for snapshots. For more information, see the *Polycom ViewStation Administrator's Guide*.

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.

To stream a conference:

1. On the main screen, select **Call Type** and then select **Streaming Call**.
2. Enter a password users must enter to view the streamed call from a browser. Give this password to users who need to access the stream.
3. Select **Start** to begin streaming.
4. Place the video call to other participants.

You can also start streaming after you place the call.

To view a streamed conference:

1. On a PC, enter the IP address of the video conferencing system to go to the system's web interface.
2. Click View a Meeting.
3. Log in using this information:
User Name: Your name.
Password: Password defined for the streamed conference. For more information, contact the person who initiated the call.
4. Click View Streaming Video.

To stop streaming a conference:

>> On the main screen, select Stop Streaming.

This stops the stream without ending the call.

Controlling What You Hear

Adjusting the 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**.

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 are speaking to someone privately.

To mute or unmute the microphone:

>> Press  **Mute** on the remote or press  on the microphone.

Showing Content

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
- ❑ A paper document or object placed on a document camera
- ❑ A videotape or DVD

You can also load PowerPoint slides to the system for sharing in a call.

You can show one type of content at a time, and you can easily switch to a different type of content if you want to. For example, you might show content from your laptop and then play a DVD. Participants at other sites can also show content. When another site begins showing content, their content replaces any content currently being viewed.

What You See When You Show Content

If your video conference supports dual streams, you can see both the people at the far end and any content at the same time. This is possible because the system can send and receive two simultaneous sources of video.

In video conferences that do not support dual streams, 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 not sent to the near site monitor over a stream.

Showing Content from a Laptop or PC

If your ViewStation system has a Visual Concert FX device connected to it, you can attach a laptop or PC and show content that is stored on that laptop or PC. Because you connect the Visual Concert FX to the LAN, you can also show content from network locations.

When you show content from a laptop or PC, the far site sees exactly what you see on the computer screen.



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

To show content stored on a laptop or PC:

1. Connect the laptop to the optional Visual Concert FX device:



For more information about the Visual Concert FX device, see the *Visual Concert FX QuickStart* and the *Visual Concert FX User Guide* available at www.polycom.com/videodocumentation.

2. 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, 72, 75, 85
1280 x 1024	60



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

3. Press  on the Visual Concert FX unit or press  **Graphics** on the remote control.

To stop showing content from a laptop or PC:

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

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

Your system administrator may have configured your system to let you use a document camera, a VCR, or a DVD player to show content.

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 on the document camera or insert the videotape or DVD.

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

1. Press  **Camera**. On remote controls that do not have a **Camera** button, press  **Near**.
2. Select a content source.
3. Press  **Select**.

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

1. Press  **Camera**. On remote controls that do not have a **Camera** button, press  **Near**.
2. Select the main camera.
3. Press  **Select**.

Showing and Viewing PowerPoint Presentations

If your system is connected to a LAN, you can show PowerPoint slides to others in a video conference. You can also allow others who are not part of the conference to view the slides using a web browser.

Before you can show your slides, you use a web browser to log in to the video conferencing system's web interface and load the slides onto the conferencing system. Up to eight presentations can be loaded onto the video conferencing system, but each one must be loaded from a different PC.

To load a PowerPoint presentation:

1. On a PC, open a web browser.
2. In the address line, enter the IP address of the video conferencing system, for example, <http://255.255.255.255>, to go to the system's web interface.
3. Click Select a Presentation and then click Press Here to Select a PowerPoint Presentation.



If this is the first time you have logged in to the system's web interface, the system prompts you to install the pcPresent slide loader application. Click **Yes** to load the application.

4. Log in to the Select a Presentation page using this information:

User Name: Your name. Participants see this name and other information when they press  **Help** during a presentation.

Password: Meeting password defined for your video conferencing system. For more information, contact your system administrator.

5. Log in to pcPresent using this information:

User Name: Name that identifies the slides on the web interface and on the system. By default, this is the name of the PC, but you can change it.

Password: Password that participants accessing the slides from the web must supply. If you don't want to require a password, leave this field blank.

6. Click Please press here to select a PowerPoint presentation. Find the presentation you want to load, and click pcPresent.

The pcPresent application converts the presentation for display on the video conferencing system. When the conversion is complete, you see a gray screen on the PC until the presenter shows the first slide.

To show a PowerPoint presentation:

1. On the remote control, press  **Graphics** and select the presentation to view.
If a password is required to view this presentation, you are prompted to enter it.
2. Use the remote control to select the first slide to show and press  **Select**.
3. Use the remote control to navigate through your slides and control your presentation:

To do this...	Press this button...
Show the next slide	 Right arrow
Show the previous slide	 Left arrow
Show the first slide	 Up arrow
Show the last slide	 Down arrow
Get information about a slide (see note below)	 Help
Switch between slides and local video (dual monitor systems only)	 Select
View thumbnails of the slides	 Back
Display the selected thumbnail	 Select
End the presentation	 Graphics

You can also navigate through the slides from the pcPresent application on your PC after the presentation begins.



Pressing  **Help** while a slide is displayed lets you see the name of the presentation, the name of the presenter, slide number, and the viewing password.

To stop showing a PowerPoint presentation:



>> On the remote control, press **Near** to switch back to live video.

To view a meeting or PowerPoint presentation from the web:

1. On a PC, open a web browser.
2. In the address line, enter the IP address of the video conferencing system, for example, `http://255.255.255.255`, to go to the system's web interface.
3. Click View a Presentation.
4. Log in using this information:
User Name: Your name.
Password: Meeting password defined for your video conferencing system. For more information, contact your system administrator.
5. Click View a Slide Presentation.



To save a copy of the slide you're viewing on the screen, right-click the slide and save it in either .JPG or .BMP format.

Sharing and Collaborating on Documents

Your system administrator may have set up your system to let you share online documents during point-to-point ISDN calls and work on them with the far site. To do this, the call must go through an external MCU that supports T.120 data collaboration.

When you share an online document, the far site sees the document just as you see it, but you maintain control of the document. You can also take sharing one step further and allow the far site participants to edit the document.

You can share and collaborate during a call if:

- The far site has a PC running NetMeeting 2.0 or higher connected to their video conferencing system in one of these ways:
 - The PC is directly connected to the video conferencing system.
 - The PC and the video conferencing system are both connected to the same LAN and both have IP addresses.
- The far site supports T.120 application sharing.
- The far site has set up the data conference as described in the next section.

To set up the data conference:

1. On your PC, start the NetMeeting application.
2. On the video conferencing system, go to **System Info > Admin Setup > Data Conference**.
3. Select Microsoft Netmeeting and enter the IP address of the PC to register NetMeeting.

The system restarts.

4. If you are organizing this call, place the call to the other site. If you are a participant in the conference, accept the incoming call.
5. In NetMeeting on your PC, enter the IP address of your video conferencing system in the address field, and then click  **Call**.

The data conference connects. The systems in the video conference are listed in the NetMeeting window.



Both sites can use NetMeeting features such as the whiteboard, text chat, and file transfer on their PCs. For information about these features, see the NetMeeting online help.

To share a document:

1. On your PC, open the document you want to share.
2. In NetMeeting, click  **Share**.
3. In the NetMeeting Sharing dialog box, select a document and click **Share**.

The far site sees the shared content on their PC, but they cannot edit it.



If the NetMeeting window covers part of the shared application, the far site sees a block of hatch marks in that area. To avoid this, minimize the NetMeeting window or drag it to another location.

To allow collaboration on a document:

>> In the NetMeeting Sharing dialog box, select a shared document and click **Allow Control**.

The far site can request control of the document by double-clicking the document. You are then prompted to give the site control.

You can take back control at any time by clicking the document.

To stop collaborating:

>> In the NetMeeting Sharing dialog box, click **Prevent Control**.

The far site sees the shared document on their PC, but can no longer edit it.



When you stop collaborating, the other participants no longer have access to the document. To send a copy of the file, use the NetMeeting file transfer feature.

To stop sharing:

>> In the NetMeeting Sharing dialog box, click **Unshare**.

Sites can no longer see the document on their PCs.

Using the Graphics Cursor

If your system is set up to use a VGA monitor as the graphics monitor, you can use the graphics cursor as a pointer as you talk about the content on the screen. The graphics cursor is available only when you show a Microsoft PowerPoint slide, a snapshot, or a Polycom Snap™ image in a conference.

Everyone in the video conference can see and move the graphics cursor. The graphics cursor remains on the screen only for the current slide or snapshot. If you display a new slide or snapshot, you must redisplay the graphics cursor if you want to use it again.

To display and move the graphics cursor:

1. When a slide or snapshot is displayed, press one of the number buttons on the remote control.

The yellow graphics cursor appears for 30 seconds.

2. Move the graphics cursor in this way:

Press this number...	To move the graphics cursor...
1	Diagonally up and to the left
2	Up
3	Diagonally up and to the right
4	Left
6	Right
7	Diagonally down and to the left
8	Down
9	Diagonally down and to the right

3. To redisplay the graphics cursor, press **5**.

Pressing **5** works as a toggle to make the graphics cursor appear or disappear.

Working with the Address Book

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

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

- ❑ **Local entries:** Information about sites that you have added and sites that you have called. These entries are stored on your ViewStation 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 .

For more information about the global directory server and the Polycom Global Management System, refer to the *Administrator's Guide for ViewStation EX, FX, and VS4000*.

Adding Address Book Entries

You can create entries for point-to-point calls and multipoint calls and save them in the ViewStation system's address book. Everyone at your site who uses the system can use the entries you create, and you can use the entries created by others. Users at other sites cannot access the local entries on your system.

To add a single-site entry to the address book:

1. Press  **Directory** on the remote control or select **Address Book** from the main screen.
If you select **Address Book**, the Speed Dial screen appears and you must select **Address Book** again.
2. Select **New** from the Address Book screen.
3. Select **One Site** from the New Address Book Entry screen to specify that this is an entry for one site.

4. Specify the following information:

In this field...	Enter this information...
Name	Name that will appear on the address book entry and on incoming call messages. To enter characters, press  Keyboard to make the onscreen keyboard appear. On remote controls that do not have a Keyboard button, press  Select .
ISDN Video Numbers	ISDN number(s) to use for calling the system.
IP Video Number	LAN address for the system.
Extension	The system's E.164 extension.
Speed	The speed of the call in kilobits per second.
Telephone	The telephone number of the phone in the room where the system is located.



If you are using Polycom OneDial™, enter both the ISDN video number and the IP video number. OneDial is a Polycom proprietary feature that greatly simplifies video conference calling by taking care of various dialing and network processes in the background. For more information about Polycom OneDial, see the *Administrator's Guide for ViewStation EX, FX, and VS4000*.

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

To add a multiple-site entry to the address book:

1. Press  **Directory** on the remote control. Or, select **Address Book** from the main screen, and then select **Address Book** from the Speed Dial screen.
2. Select **New** from the Address Book screen.
3. Select **Multi-Site** from the New Address Book Entry screen to specify that this is an entry for multiple sites.
4. Specify a speed for the call. Note that each call in the multipoint conference is placed at the same speed.
5. Add up to three numbers to this multiple-site entry either by:
 - selecting entries from the address book, or
 - adding entries manually
6. Select **Save** to save the entry.
7. Enter a name for this entry as you want it to appear in the address book and select **OK**.

Editing Address Book Entries

You can edit the information for any local entry in the address book.

To edit an entry:

1. Press  **Directory** on the remote control. Or select **Address Book** from the main screen, and then select **Address Book** from the Speed Dial screen.
2. Scroll to the entry you want to edit and then select **Edit**.
3. Edit the information on the Add/Change Entry screen as needed.
4. Select **Save** to save your changes and return to the address book.

Deleting Address Book Entries

You can delete any local entry in the address book.

To delete an entry:

1. Press  **Directory** on the remote control. Or select **Address Book** from the main screen, and then select **Address Book** from the Speed Dial screen.
2. Scroll to the entry you want to delete and then select **Delete**.

Including Multiple Sites in Calls

You can use the ViewStation system to participate in multipoint conferences. During a multipoint conference, a multipoint conferencing unit (MCU) enables you to see video from the various sites so that you can 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

The ViewStation system lets you connect to multipoint calls using an external MCU. If your system includes the optional internal MCU, you can also make multipoint calls with the ViewStation system. 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 after the call connects
External MCU	Number of sites allowed by the MCU	IP, ISDN, or both	Before the call begins

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 multipoint address book entry to call all of the sites at one time. Or you can place a call, and then add other sites after the 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 ViewStation system with PathNavigator.
 - Configure the ViewStation system to use PathNavigator for multipoint calls.
 - Create a multi-site entry in the address book.

Contact your system administrator for more information about PathNavigator.

- For cascading multipoint calls, far site participants add additional sites to the multipoint call after the call has been initiated by the main site.

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.
4. Place a call to the next site.
5. Repeat steps 2, 3, and 4 until all the sites are connected.

To place a multipoint call using the address book:

1. Select **Video Call** from the main screen.
2. Select **Multipoint** from the Video Phone screen.
3. Enter the names of the sites you want to call in either of these ways:
 - Select a name from the address book by selecting the Address icon.
 - Manually enter the telephone number of the site by using the number buttons on the remote control.
4. Press  **Call•Hang Up** to place the call.

To place a cascaded multipoint call:

1. Place a multi-site call from the Address Book, or place calls one at a time to up to three other sites.
2. Ask each site to call up to two additional sites.



The far sites in the original multipoint call can each call out to two video sites and one audio-only site.

For more information about cascading calls, please refer to the *Administrator's Guide for ViewStation EX, FX, and VS4000*.

Supplying a Password for External MCU Calls

External MCUs sometimes require you to enter a password in order to join a conference. For this type of call, you can configure the system to enter the meeting password for you.

To configure a meeting password:

1. Select **System Info** from the main screen.
2. Select **User Setup** from the System Information screen.
3. Enter the password in the **Meeting Password** field.

To enter text, press  **Keyboard** to make the onscreen keyboard appear. On remote controls that do not have this button, press

 **Select.**

4. Press  **Home** to save your change and return to the main screen. On remote controls that do not have this button, press

 **Menu.**

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 Info** from the main screen.
2. Select **User Setup** from the System Information screen.
3. Select **Multipoint Mode** from the User Setup screen.
4. Select one of the following:

Select this...	To do this...
Auto	<p>Enable the system to determine the optimal multipoint viewing mode based on the interaction between the sites.</p> <ul style="list-style-type: none"> • If more than one site is talking at the same time, the system uses Discussion mode. • If one speaker talks without interruption for about 15 seconds, the system uses Presentation mode. However, if that site is interrupted for several seconds, the system switches to Discussion mode.
Discussion	<p>View all of the sites at the same time, including your own site.</p> <ul style="list-style-type: none"> • If you have a single-monitor system, all the sites appear on the monitor in as many windows as there are sites in the call. • If you have a dual-monitor system, and are in a three-site call, each far site appears full screen on a monitor and your site appears in the PIP on the main monitor. • If you have dual-monitor system and are in a four or more site call, your site appears in the second monitor and the far sites all appear in windows on the first monitor. • If you have at least as many monitors as sites, each site (including your own) appears on a separate monitor. <p>This multipoint viewing mode is also known as continuous presence.</p>

Select this...	To do this...
Presentation	<p>View the person who is speaking.</p> <ul style="list-style-type: none"> • If you have a single-monitor system, the speaker appears full screen on your monitor. • If you have a dual-monitor system, the speaker appears on the main monitor and the other sites appear in windows on the second monitor. <p>This multipoint viewing mode is also known as voice-activated switching.</p>
Full Screen	<p>Enable every site in the call to see the speaker full screen.</p>

Controlling How the System Answers Multipoint Calls

>> Scroll to the **Auto Answer Multipoint** field and select one of the following:

Select this...	To do this...
No	<p>Receive notification when a call comes in.</p> <ul style="list-style-type: none"> • If you answer Yes to the prompt, the system adds the call to the ongoing conference. • If you answer No to the prompt, the system rejects the call.
Yes	<p>Answer incoming calls automatically.</p>
Do Not Disturb	<p>Refuse incoming calls. Callers will hear a busy signal and you will receive no notification about incoming calls.</p>

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: <ul style="list-style-type: none"> ViewStation EX, FX, and VS4000 systems connected by IP or ISDN (including mixed calls) 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. Press  **Near**.
2. Select  **Chair Control**.
3. Use the arrow buttons on your remote control to:
 - Scroll right and left to select a site.
 - Scroll up and down to perform one of these actions:

If you are...	You can Do This...	By Selecting...
Chair controller	Send the selected site's video to the other sites	Select Broadcaster
	Let the system automatically send the video of the person who is currently speaking to other sites. You remain chair controller.	Voice Switching
	Stop being chair controller	Release Chair
	Remove the selected site from the conference	Disconnect Site
	End the conference	End Conference

If you are...	You can Do This...	By Selecting...
Chair controller	View the selected site's video. This does not change what other sites see.	View Site
	View the video selected by the chair or the MCU	Stop Viewing
Participant	Request control of the conference	Acquire Chair
	Request that your site's video be sent to the other sites	Make Me the Broadcaster
	View the selected site's video. This does not change what other sites see.	View Site
	View the video selected by the chair or the MCU	Stop Viewing

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 point-to-point or multipoint calls, you can refuse incoming calls. During this time, 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. Select **System Info** from the main screen.
2. Select **User Setup** from the System Information screen.
3. If you do not wish to be disturbed by incoming point-to-point calls, scroll to the **Auto Answer Point to Point** field, press , and select **Do Not Disturb**.
4. If you do not wish to be disturbed by incoming multipoint calls, scroll to the **Auto Answer Multipoint** field, press , and select **Do Not Disturb**.
5. Press  **Home** to save your change and return to the main screen. On remote controls that do not have this button, press  **Menu**.

Answering Calls Automatically

You can specify whether to answer point-to-point and multipoint 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 automatically answer calls:

1. Select **System Info** from the main screen.
2. Select **User Setup** from the System Information screen.
3. If you want to automatically answer incoming point-to-point calls, scroll to the **Auto Answer Point to Point** field, press , and select **Yes**.

4. If you want to automatically answer incoming multipoint calls, scroll to the **Auto Answer Multipoint** field, press , and select **Yes**.



To prevent incoming callers from overhearing a conversation not intended for them, you can choose to mute all automatically answered calls.

5. Press  **Home** to save your change and return to the main screen. On remote controls that do not have this button, press  **Menu**.

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. You can also use the  button on the microphone pod.

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 Info** from the main screen.
2. Select **User Setup** from the System Information screen.
3. Scroll to the **Mute Auto Answer Calls** field and press  to check the box.
4. Press  **Home** to save your change and return to the main screen. On remote controls that do not have this button, press  **Menu**.

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 placing a call or after the system is in a call.

Allowing the Far Site to Control Your Camera

Allowing the far site to control your camera lets the other participants 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 Info** from the main screen.
2. Select **User Setup** from the System Information screen.
3. Scroll to the **Far Control of Near Camera** field and press  to check the box.
4. Press  **Home** to save your change and return to the main screen. On remote controls that do not have this button, press  **Menu**.



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

Specifying When to Display the PIP

You can specify how the PIP appears when the call connects. After the call connects, you can show or hide the PIP, regardless of this setting.

To specify when to display the PIP:

1. Select **System Info** from the main screen.
2. Select **User Setup** from the System Information screen.
3. Scroll to the **PIP** field, press , and select one of these settings:

Select this setting...	To show the PIP...
Auto	On connection, when you pick up the remote control, and when you press any of the camera control buttons.
On	On connection and during the call.
Off	Never.

4. Press  **Home** to save your change and return to the main screen. On remote controls that do not have this button, press  **Menu**.

Displaying the Far Site’s Name When the Call Connects

With this option, you can specify how long to leave the name of the far site on the screen once the call connects.

To specify how long to display the name of the far site:

1. Select **System Info** from the main screen.
2. Select **User Setup** from the System Information screen.
3. Scroll to the **Far Site Display Time** field and enter the amount of time to display the far site’s name.
4. Press  **Home** to save your change and return to the main screen. On remote controls that do not have this button, press  **Menu**.

Adjusting for Strong Room Lighting

You can use the backlight control to adjust the brightness of the video that the main camera sends to the ViewStation system. Brightness controls adjust the camera's iris to take in less light. In most situations, you do not need to use the Backlight Compensation setting. However, adjusting brightness can be helpful when the room arrangement results in strong light coming from behind the people being viewed.



Because brightness 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 Info** from the main screen.
2. Select **User Setup** from the System Information screen.
3. Scroll to the **Backlight Compensation** field and press  to check the box.
4. Press  **Home** to save your change and return to the main screen. On remote controls that do not have this button, press  **Menu**.

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 sharing documents.

Tips for Great Meetings

- ❑ Make sure you have the video number(s) of each site you want to call or that the sites are listed in the address book.
- ❑ Set your camera presets before you start your call so that you can quickly use them during the call. (You can set up to ten 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 you can add the Visual Concert FX to connect a laptop or desktop PC if you want to share data.

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

- ❑ Place the microphone on the table in front of the people in the meeting. If your room is very large, consider adding another microphone.
- ❑ 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.
- ❑ 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.
- ❑ As with any meeting, try to limit side conversations.

Tips for Sharing Documents

- ❑ Attach a laptop or a desktop PC to your system (if your system includes the Visual Concert FX). 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 share your documents, such as Microsoft® PowerPoint, Project, or Word.