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

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

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

The latest user information about version 3.0.2 of the Polycom HDX System software, version 1.2.0 of the Polycom Touch Control Operating System software, and version 1.2.0 of the Polycom Touch Control Panel software is provided in this guide.

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

Using the Touch Control

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

Powering the System On and Off

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

To power on the Polycom HDX system:

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

To power on the Polycom Touch Control:

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

To power off the Polycom HDX system:

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

To power off the Polycom Touch Control:

1. From the Home screen touch **User Settings**.
2. Scroll to the Power section.
3. Select **Touch Control Power**.
4. In the menu that appears, select **Power Off the Touch Control**. If you choose to power off the Polycom Touch Control device, you must disconnect and reconnect the LAN cable to power it on again.

To wake up the Polycom Touch Control:

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

Calling and Answering

Answering a Call

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

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

Placing a Call

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

- Entering a name or number on the Place a Call screen.
- Choosing a site from:
  - Recent Calls list
  - Favorites screen
  - Directory
- Calling into a scheduled meeting from the Calendar screen.

Calling by Entering a Name or Number

To place a call by entering a name or number:

1. From the Home screen touch **Place a Call**.
2. In the dialing field, enter the dialing information. Depending on the capabilities of your system and the system you are calling, the dialing information could look like one of these examples:
   - 10.11.12.13 (IP address—include the dots)
   - 2555 (E.164 extension for H.323 or SIP)
   - stereo.polycom.com (DNS name)
   - 19782922854 (ISDN or phone number)
   - user@domain.com (SIP)

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

   To backspace, touch **Delete**.
3. Touch to place the call.

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

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

Calling from the Recent Calls List

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

To place a call from the Recent Calls screen:

1. From the Home screen touch **Place a Call**, and then touch **Recent Calls**.
2. Touch an entry to place the call.

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

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

Calling from the Favorites Screen

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

To place a call from the Favorites screen:

1. From the Home screen touch **Place a Call**, and then touch **Favorites**.
2. Touch an entry to place the call.

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

To add, edit, or delete Favorites:

1. On a computer, open Internet Explorer 6.x or later.
2. In the browser address line, enter the HDX system's IP address, for example, `http://10.11.12.13`, to go to the video conferencing system's web interface.
3. Select **Place a Call > Directory**.
4. Select **+Favorites** in the directory list.
5. Do one of the following:
   - Select **Create Contact** to create a new Favorite.
   - Select **Add from Directory** to add an existing directory entry to Favorites.
   - Highlight a Favorite, and then edit or delete it.

Calling from the Directory

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

To place a call from the directory:

1. From the Home screen touch **Search the Directory**.
2. Scroll to the entry or group you want, or touch the **Search** field to start entering the name.
3. Touch an entry to place the call.

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

1. Using the first call type in the preferred dialing order configured by the administrator, the system calls the first device listed for the directory entry, then the second device, and so on until the call connects.
2. If the call fails to connect to any device, the system attempts to place the call using the next call type in the preferred dialing order, starting with the first device, then the second device, and so on until the call connects.

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

Calling from the Calendar

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

To join a scheduled meeting from the Calendar screen:

1. From the Home screen touch **Calendar** or the date and time display at the top of the screen.
2. Touch **Join** to call into the meeting. Only meetings scheduled with the Polycom Conferencing Add-In for Microsoft Outlook display a **Join** button.

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

Call Screen

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

- Touch the **Volume** slider to adjust the volume at your site.
- Touch the **Mute** icon to mute or unmute your microphones.
- Touch **Hang up** to end the call.
- Touch **Add call** to add another call participant.
- Touch **Cameras** to adjust the cameras or view presets.

- Touch **Keypad** to send DTMF tones.
- Touch **Show Content** to select, start, or stop content.
- Touch **Layout** to change the video layout at your site.
- Touch i to get more information about the participants in the call or view call statistics.

If you navigate away from the call screen during a call, you can return to it at any time by touching the green **Back to the Call** button.

Ending a Call

To hang up from a call:

1. From the call screen touch **Hang Up**.
2. If prompted, confirm that you want to hang up.

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

Types of Video Calls You Can Make

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

The following table lists some possible call combinations.

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

Points to note about special dialing scenarios:

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

If you use the Polycom HDX 4000 series display as your computer 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.

Controlling What You See

Selecting and Adjusting a Camera or Other Video Source

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

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

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

1. From the call screen touch **Camera**, or from the Home screen touch **Cameras**.
2. If you are in a call, touch **Near** or **Far** to select either near-site or far-site control.
3. Touch **Select Camera**, and then touch the camera or other video source you want to use.

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

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

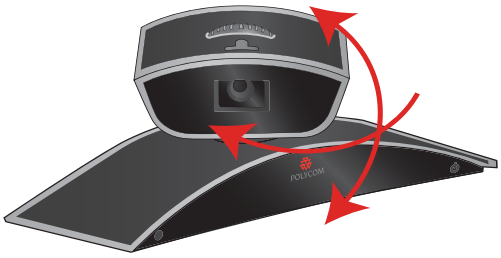
1. Select either a near-site or far-site video source to control. During a multipoint call being hosted by a system in the call, you can only adjust a camera at the far site that is currently speaking.

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

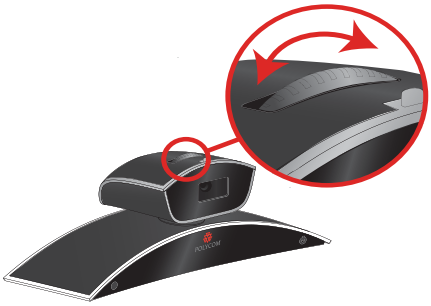
2. Touch **Control Camera**.
3. Touch the arrow buttons on the touch control to move the camera up, down, left, or right.
4. Touch and to zoom out or in.

To adjust a Polycom EagleEye View camera:

>> Manually swivel the camera right, left, up, or down to frame the view.



>> Turn the focus wheel to adjust the focus.

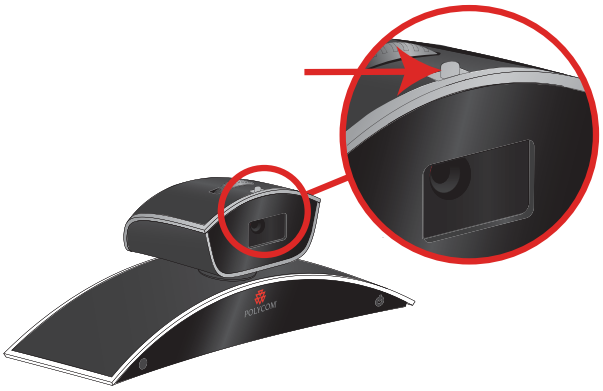


>> Select the camera, and then touch and to zoom out or in.

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

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

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



Starting and Stopping Camera Tracking with EagleEye Director

If EagleEye Director tracking is enabled, the tracking camera follows the person or people who are speaking. You can start and stop EagleEye Director camera tracking.

To start camera tracking:

1. Touch **Cameras** on the Home screen or Call screen.
2. If the EagleEye Director is not currently selected, take the following steps:
   a. Touch **Select Cameras** and select the EagleEye Director camera.
   b. Touch **Control Camera**.
3. Select **Start Camera Tracking**.

To stop camera tracking:

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

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

- Camera tracking starts automatically when you make a call.
- Camera tracking stops once you hang up a call.
- Camera tracking temporarily stops when you mute the HDX system. It resumes when you unmute the HDX system.

Setting and Using Camera Presets

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

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

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

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

1. From the Home screen or call screen, touch **Camera**.
2. If you are in a call, touch **Near** or **Far** to select either near-site or far-site control.
3. Touch **View Presets**.

   Icons for presets 0-9 are shown on the screen. Solid preset icons indicate stored camera positions. Transparent icons indicate unassigned presets.
4. Touch a number to go to a saved preset.

To store a preset:

1. From the Home screen or call screen, touch **Camera**.
2. If you are in a call, touch **Near** or **Far** to choose a near-site or far-site camera.
3. Touch **Select Camera** to choose a camera or other video source.
4. Touch **Control Camera** to move the camera to the desired position.
5. Touch **View Presets**, then touch and hold a number for 5 seconds to store the preset position. Any existing preset stored at the number you select is replaced.

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

Changing the Layout during a Video Call

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

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

- Touch **Inside** to change the location of the PIP.
- Touch **Outside** and then select **Touch to Change Layout** in the middle of the screen to cycle through different Dual Monitor Emulation layouts on the HDX system monitor.
- Touch **Swap Picture** to swap the near and far video.
- If the call is hosted by a Polycom RMX® system, a **Multiple Site Layouts** tab might appear, which you can touch to select various multipoint views for different numbers of sites. Touch the **My Picture** tab to return to the **Inside**, **Outside**, and **Swap Picture** PIP choices.

Adjusting Touch Control Brightness

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

To adjust the touch control display brightness:

1. From the Home screen touch **User Settings**.
2. Select **Touch Control** tab if it is visible.
3. Use the slider under **Display** to adjust the display's brightness.

Controlling What You Hear

Adjusting Volume

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

To adjust the volume:

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

Muting the Microphone

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

To mute or unmute the microphone:

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

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

Points to note about muting the microphone:

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

Adjusting Touch Control Volume

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

To adjust the touch control volume:

1. From the Home screen touch **User Settings**.
2. Select **Touch Control** tab if it is visible.
3. Use the **Volume** slider to adjust the Polycom Touch Control volume.

Enjoying Stereo Audio in Video Calls

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

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

Showing Content

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

- Any information stored on a computer
- Some types of information stored on a USB drive
- A paper document or object placed on a document camera
- A videotape or DVD

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

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

When you are sending content, a message appears on your main monitor. Depending on the configuration of your system, you might also see the content on your monitor or projector.

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

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

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

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

   If autorun is enabled on the computer, you are prompted to run People+Content IP. If autorun is disabled on your computer, People+Content IP shows up as an external drive, and you must navigate to **My Computer** to launch it manually.
2. Launch People+Content IP.
3. Open the content you want to show, and click in People+Content IP.
4. Click in People+Content IP to stop showing content.

Showing Content with People+Content™ IP

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

Points to note about People+Content IP:

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

To install People+Content IP on a computer:

1. On a computer with a Microsoft® Windows XP, Windows Vista, or Windows 7 operating system, open a web browser and go to www.polycom.com/ppcip.
2. Download and install the People+Content IP software.

To start showing content:

1. On the computer, start the Polycom People+Content IP application.
2. Enter the IP address or host name of the Polycom HDX system and the meeting password, if one is set. To view the IP address of the HDX system, touch **System** from the Home screen and then touch next to **HDX System**.
3. On the computer click **Connect**.
4. Open the content you want to show, and click in People+Content IP.

To stop showing content:

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

To keep the call secure, content might be automatically stopped when a participant joins the call.

Showing Content from a Computer Connected Directly to the HDX System

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

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

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

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

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

To set the resolution and refresh rate, right-click your computer desktop and select **Properties > Settings**.

To start showing content:

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

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

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

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

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

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

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

3 Touch the computer input.

Audio from the content input is muted unless the content input is selected as a video source.

To stop showing content:

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

Showing Content from a USB Drive

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

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

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

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

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

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

4 Navigate to the file that you want to show.

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

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

» Touch the tabs at the bottom of the screen.

» Touch a tab again to reverse the sort order.

» Touch a folder to open it.

» Press to go back one level.

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

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

5 To view a file, touch it.

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

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

– To zoom in or out, touch and . To reset the content to its original size, touch .

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

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

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

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

To annotate the content:

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

   – Touch to draw red lines on the content.

   – Touch to add yellow highlighting to areas of the content.

   – Touch to white-out areas of the content.

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

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

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

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

Before the call begins:

- Make sure the document camera, VCR, or DVD player is connected and powered on. Refer to the setup sheet that came with your system.
- Position your document or object in the document camera or insert the videotape or DVD.

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

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

2 Touch a content source.

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

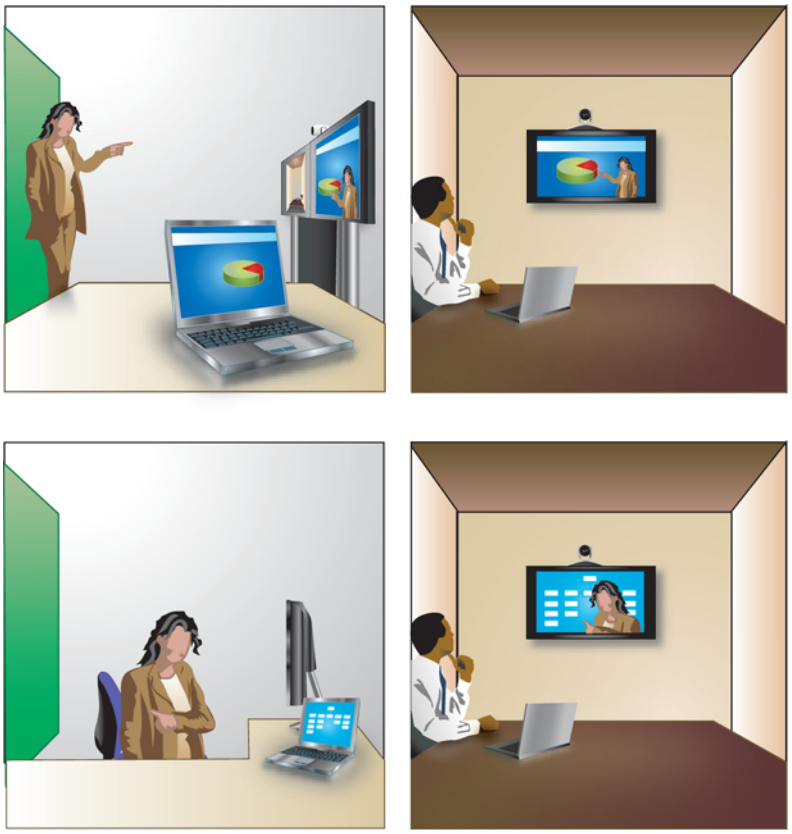
To stop showing a document, object, videotape, or DVD in a call:

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

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

Showing Content with Polycom People on Content™

The Polycom People on Content™ option allows you to show yourself on top of content that you are sharing. The effect is similar to a weather newscast on television.



Contact your administrator for information about enabling or configuring People on Content.

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

- Wear solid neutral-colored clothes.
- Avoid wearing black, white, or the color of your background.
- Make sure that the room is well lit.
- Stand about 3 feet in front of the background to avoid casting shadows on it.

To show content with People on Content:

1. Make sure that the content you want to show is ready.
2. From the Home screen or call screen, touch **Show Content**.
3. Touch **PeopleOnContent**.

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

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

To stop showing content with People on Content:

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

Including Multiple Sites in Calls

Your system might be configured to participate in multipoint calls. During a multipoint call, multiple sites can see and hear each other. You can also share content in a multipoint call, just as you can in a point-to-point call.

You can host multipoint calls using a video conferencing system with multipoint capabilities, or you can use a bridge such as the Polycom RMX 1000, Polycom RMX 2000, or Polycom MGC™.

Placing a Multipoint Call

How you place a multipoint call depends on whether you're using a Polycom HDX system with multipoint capabilities or a bridge such as the Polycom RMX 1000, Polycom RMX 2000, or Polycom MGC. The number of sites allowed in the call is determined by the capabilities of the system or bridge hosting the call. The call can include any combination of IP H.323, SIP, ISDN, V.35/Serial, and audio-only endpoints, although some ISDN systems might not be configured to allow mixed IP and ISDN calls. For more information about call types, refer to Types of Video Calls You Can Make on page 8.

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

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

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

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

To place a multipoint call using a directory group:

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

2 Touch a group folder in the directory list.

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

To place a cascaded multipoint call:

1 Call a group from the directory, or place calls one at a time to several other sites. For more information, refer to Placing a Call on page 3.

2 Ask each site to call additional sites.

Passwords for Multipoint Calls

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

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

To enter a meeting password:

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

To configure a meeting password:

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

2 Touch the **HDX System** tab.

3 In the **Meeting Password** field under **Meetings**, enter the password.

Multipoint Viewing Modes

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

Setting	Description
Video images from multiple sites can be automatically combined on one monitor in a display known as *continuous presence*.	
Auto	The view switches between continuous presence and full screen, depending on the interaction between the sites. If multiple sites are talking at the same time, continuous presence is used. If one site speaks uninterrupted for at least 15 seconds, that site appears in full screen on the monitor.
Discussion	Multiple sites are displayed in continuous presence. The current speaker's image is highlighted.
Presentation	The speaker sees continuous presence while the other sites see the speaker in full screen on the monitor.
Full Screen	The site that is speaking is shown in full screen to all other sites. The current speaker sees the previous speaker.

Using Chair Control for Multipoint Calls

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

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

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

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

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

1. On a computer, open Internet Explorer 6.x or later.
2. In the browser address line, enter the system's IP address, for example, `http://10.11.12.13`, 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 control to the selected sites.	**Release Chair**
	View the selected site's video. This remains in effect until you choose **Stop Viewing Site** or you release chair control.	**View Site**
	Return to viewing the video selected by the chair or by the host.	**Stop Viewing Site**
	Send your site's video to the other sites.	**Make Me the Broadcaster**
	Send the selected site's video to the other sites.	**Select Broadcaster**
	Remove the selected site from the conference.	**Disconnect Site**
	Disconnect all sites and end the call.	**End Conference**
Participant	Request control of the conference.	**Acquire Chair**
	View the selected site's video. This does not change what other sites see.	**View Site**
	Return to viewing the video selected by the chair or the host.	**Stop Viewing Site**

Changing the Way Calls Are Answered

Temporarily Refusing Calls

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

To temporarily refuse incoming calls:

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

2 Touch the **HDX System** tab.

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

Answering Video Calls Automatically

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

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

To automatically answer video calls:

1. From the Home screen touch **User Settings**.
2. Touch the **HDX System** tab.
3. If you want to automatically answer incoming point-to-point video calls, set **Auto Answer Point-to-Point** to **Yes**.
4. If you want to automatically answer incoming multipoint video calls, set **Auto Answer Multipoint Video** to **Yes**.

Muting Automatically Answered Video Calls

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

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

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

To mute automatically answered video calls:

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

Viewing Presence States for Favorites

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

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

If your system is registered to a Microsoft Office Communications Server (OCS) or Microsoft® Lync™ Server 2010 directory server, refer to Viewing Microsoft Office Communications Server or Microsoft Lync Server 2010 Presence States on page 30.

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

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

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

Managing Contacts Using Office Communicator or Microsoft Lync

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

To manage your contacts using Office Communicator or Microsoft Lync:

1. Log in to Office Communicator or Microsoft Lync with the same user name and password specified in the SIP settings of your Polycom HDX system.
2. From Office Communicator or Microsoft Lync you can:
   - Add and remove contacts
   - Add and remove groups
   - Move contacts from group to group

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

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

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

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

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

Multipoint Calls Using Centralized Conferencing Control Protocol (CCCP)

If a Polycom HDX system is deployed in a Microsoft Lync Server 2010 environment and Centralized Conferencing Control Protocol (CCCP) is enabled, you can place and participate in multipoint calls that are hosted by Microsoft audio and video servers.

Contact your system administrator for more information about CCCP multipoint calling.

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

1. From the Call screen, touch **Add Participant**.
2. Select **Keypad** and enter a number to call, or choose a site from one of the following locations:
   - **Recent Calls** list
   - **Favorites** screen
   - **Directory**

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

Muting in a CCCP Call

A Microsoft Lync client acting as the call organizer can mute all of the participants in the call. You cannot unmute until the organizer unmutes the participants unless you are designated as a presenter. If the meeting organizer has muted your Polycom HDX system selectively, you can unmute your system even if the organizer does not.

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

Customizing Your Workspace

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

Allowing the Far Site to Control Your Camera

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

To allow the far site to control your camera:

1. From the Home screen touch **User Settings.**
2. Touch the **HDX System** tab.
3. Under **Camera**, touch **Far Control of Near Camera** to enable the option.

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

Adjusting for Room Lighting

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

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

To turn backlight compensation on:

1. From the Home screen touch **User Settings.**
2. Touch the **HDX System** tab.
3. Under **Camera**, touch **Backlight Compensation** to enable the option.

Allow Room or Call Monitoring with the Polycom HDX Web Interface

To enable room and call monitoring:

1. From the Home screen, touch **User Settings**.
2. Touch the **HDX System** tab.
3. Enable **Allow Video Display on Web** under **Meetings** to allow the room or call to be viewed remotely.

Using the Virtual Remote Control

During normal operation, the Polycom Touch Control device uses an IP connection to communicate with the HDX system. If this connection is lost for more than 2 minutes, you might see error messages on the HDX system monitor and the Polycom Touch Control screen. You can access a virtual remote control on the Polycom Touch Control device that allows you to

control the HDX system until the connection is restored. The virtual remote control sends IR signals across the room, so make sure the back of the Polycom Touch Control device is facing the HDX system camera.

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

Polycom Solution Support

Polycom Implementation and Maintenance services provide support for Polycom solution components only. Additional services for supported third-party Unified Communications (UC) environments integrated with Polycom solutions are available from Polycom Global Services and its certified Partners. These additional services will help customers successfully design, deploy, optimize and manage Polycom visual communications within their UC environments.

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