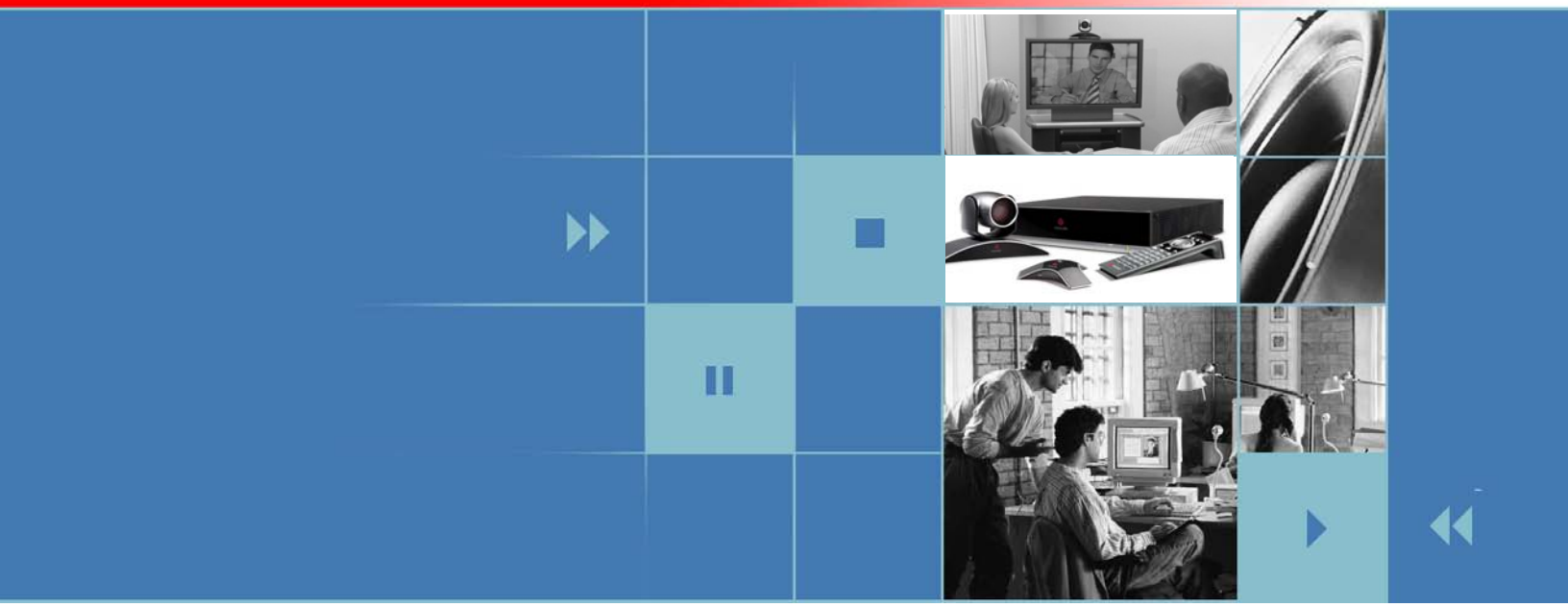

User's Guide for Polycom® HDX Room Systems

Version 2.5

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User's Guide for Polycom HDX Room Systems

Version 2.5

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

Polycom® HDX systems can be customized to show only those options used in your organization. Therefore, there may be options covered in this guide that you cannot access on your system. To find out more about these options, please talk to the administrator of your Polycom HDX system.

This guide covers instructions for the following models:

Polycom HDX 9000™ Series

Polycom HDX 8000™ Series and
Polycom HDX 7000™ Series

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Using the Remote Control

You use the remote control to place calls, adjust the volume, navigate screens, and select options.

Access the online help; see system status in a call

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

Cycle through display layouts

Select a far-site camera or video source

Navigate through menus

Increase or decrease the sound you hear from the far sites

Select a near-site camera or video source

Return to the previous screen

Place or answer a call

Display the onscreen keyboard to enter text

Display menu of optional features

Press once for a dot, twice for a colon, three times for an asterisk

Press to power the system on; hold to power off

View button presses and various menus

Select a camera or other video source

Start and stop sending content to far sites

Confirm your current selection; perform functions on highlighted items

Zoom the camera in or out

Mute the microphone audio you're sending to the far sites

Return to the home screen

View or manage directory entries

End a call

Delete letters or numbers

Enter letters or numbers; move the camera to a stored preset position

Control a programmed recording device

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Calling and Answering

Answering a Video Call

The Polycom HDX system can answer incoming calls in one of these ways:

- The system answers incoming calls automatically.
- The system prompts you to answer calls manually.

To answer the call manually:

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

Placing a Video Call

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

- Entering a name or number. To enter letters, press **Keyboard** on the remote control.
- Choosing a site from:
  - Recent Calls list
  - Contacts list
  - Sites or Speed Dial list
  - Directory

Calling by Entering a Name or Number

To place a call by entering a name or number:

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

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2. Enter any additional information needed for the call. The available settings depend on the type of call and your system's configuration. Not all calls require these settings:
   - **Call Quality** – Specify the call rate or call type 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 person you are calling instructs you to do so.
   - **Extension** – If you need to dial an extension (E.164 address), 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. You can also specify characters in the dial string as instructed by the system administrator.
3. Press **Call** on the remote control to place the call.

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

Calling from the Recent Calls List

You may be able to choose a number to call from a list of the sites you have called recently. The Recent Calls screen provides details of all incoming and outgoing calls, including the time of the calls.

To place a call from the Recent Calls screen:

1. Select **Recent Calls**.
2. Scroll to the entry you want to call.
3. Press **Call** to place the call.

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

You can sort the list by pressing the number keys 1-9. Press **Info** and select **Help** to view sorting options.

Calling from the Contacts List

You may be able to see a list of Contacts on the Contacts home screen.

To place a call using the Contacts list:

1. Select the Contact you want to call.
2. Press **Call** to place the call.

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Calling from the Sites or Speed Dial List

You may be able to access calling information for specific sites using the Speed Dial or Sites list on the Place a Call screen.

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

1. Select **Speed Dial** or **Sites** from the Place a Call screen, if necessary.
2. Find the entry you want to call.
3. Press **Call** to place the call.

Calling from the Directory

The directory is a list of sites stored locally on the Polycom HDX system. If the system is registered with a global directory, the directory also includes entries from the global directory.

To place a call from the directory:

1. Press **Directory** on the remote control.
2. Find the entry to call.
3. Press **Call** to place the call.

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

Ending a Video Call

To hang up from a call:

1. Press **Hang Up** on the remote control.
2. If prompted, confirm that you want to disconnect from the far site(s).

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

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Types of Video Calls You Can Make

Depending on your system configuration, you may be able to make calls using ISDN, H.323, SIP, or V.35/RS-449/RS-530.

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.

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

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

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Placing Audio-only Calls and Adding Audio-only Sites

You may be able to use your Polycom HDX system to place an audio-only call or add an audio-only call to a video conference.

Placing an Audio-only Call

You can place an audio-only call from Polycom HDX systems that have Analog Phone or Voice Over ISDN enabled.

To place an audio-only call from your system:

1. On the Place a Call screen, enter the number you want to call.
   - To place a call within your PBX system, enter the internal extension instead of the full number.
   - To delete a number, press **Delete** on the remote control.
2. Press **Call** to place the call.

Adding an Audio-only Call to a Video Call

You can add an audio-only call from Polycom HDX systems that have Analog Phone or Voice Over ISDN enabled.

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

1. Press **Call** on the remote control.
2. 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.
3. Press **Call** on the remote control.

Adding a Video Call to an Audio-only Call

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

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

1. On the Place a Call screen, enter the number you want to call.
2. Press **Call** to place the call.

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Ending an Audio-only Call

To hang up from an audio-only call:

1. Press **Hang Up** on the remote control.
2. If prompted, confirm that you want to disconnect from the far site(s).

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

Participating in an Encrypted Call

If encryption is enabled on the system, a padlock icon appears on the monitor to indicate whether a call is encrypted or unencrypted.

- If you are in a point-to-point call or a multipoint call hosted by another system, the padlock icon displays the state of your individual connection.
- If you are hosting a multipoint call, the padlock icon displays the combined state of all connections: if all connections in the call are encrypted, if one or more connections in the call are not encrypted.

In one call, some connections might be encrypted while others are not. The padlock icon might not accurately indicate whether the call is encrypted if the call is cascaded or includes an audio-only endpoint. To avoid security risks, Polycom recommends that all participants communicate the state of their padlock icon verbally at the beginning of a call.

Controlling What You See

Selecting and Adjusting a Camera or Other Video Source

You can use the remote control to select and adjust the main camera or any other near-site or far-site video sources, such as document cameras, computers, VCRs, or DVD players. You may 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 to allow you to control it.

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

1. If you are in a call, press **Near** or **Far** on the remote control to select either near-site or far-site control.

	This onscreen icon indicates that you can control a near-site camera or video source.
	This onscreen icon indicates that you can control a far-site camera or video source.

2. Press **Camera** on the remote control. Then select the camera or other video source you want to use.

To adjust a camera using the remote control:

1. Press **Near** or **Far** to select either near-site or far-site 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.
2. Press the arrow buttons on the remote control to move the camera up, down, left, or right.
3. Press **Zoom** on the remote control to zoom 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.

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 electronic pan, tilt, and zoom movement, you can create up to 100 preset camera positions (0-99) for the near site. Each preset stores the camera number, its zoom level, and the direction it points (if appropriate). They remain in effect until you delete or change them.

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If far-site camera control is allowed, you can create up to 16 presets (0-15) for the far-site camera. These presets are saved only for the duration of the call. You may also be able to use presets that were created at the far site to control the far-site camera.

To move the camera to a preset:

1. If a call is connected, press **Near** or **Far**, and then choose a near-site or far-site camera.
2. Press a number on the remote control.

Selecting a preset for a content source toggles the content on and off.

To view your near-site presets:

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

  Icons for presets 0-9 are shown on the screen. The colored icons indicate stored camera positions, and the gray icons indicate unassigned presets.

To store a preset:

1. If you are in a call, press **Near** or **Far**, and then choose a near-site or far-site camera or other video source.
2. If you selected a camera that supports electronic pan, tilt, and zoom, you can adjust the camera's position:
   - Press the arrow buttons on the remote control to move the camera up, down, to the left, or to the right.
   - Press **Zoom** to zoom the camera out or in.
3. Press **Preset** on the remote control.
4. Press and hold a number to store the preset position. To store a double-digit preset, press the first digit quickly and hold the second number down. Any existing preset stored at the number you enter is replaced.

   The system uses preset 0 as the default camera position.

To delete all presets:

1. If you are in a call, press **Near**, and then choose a near-site video source.
2. Press **Preset** on the remote control.
3. Press and hold **Delete** to delete all presets.

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

Switching Between Full-Screen Video and the Home Screen

When the call connects, the system automatically shows video on the whole screen. You can switch back to the home screen during a call if, for example, you need to adjust a user setting, and your system is configured to allow you to do so.

To see video in the full screen:

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

To see the home screen:

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

Enabling Dual Monitor Emulation

If your system administrator has allowed access to user settings, you may be able to set your system for Dual Monitor Emulation (also called split-screen viewing). With Dual Monitor Emulation, you can see both the near and far sites on one monitor.

To enable Dual Monitor Emulation:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Select **Next** to see more settings.
4. Scroll to **Dual Monitor Emulation** and press on the remote control to enable the option.
5. Press **Home** to save your change and return to the home screen.

During calls using Dual Monitor Emulation without content, you can press the **Display** button on the remote control to scroll through the following screen layouts:

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1. Near and far sites, same size, side by side
2. Far site big, near site small
3. Near site big, far site small
4. Near site, full screen
5. Far site, full screen

The last layout viewed is used for the next call.

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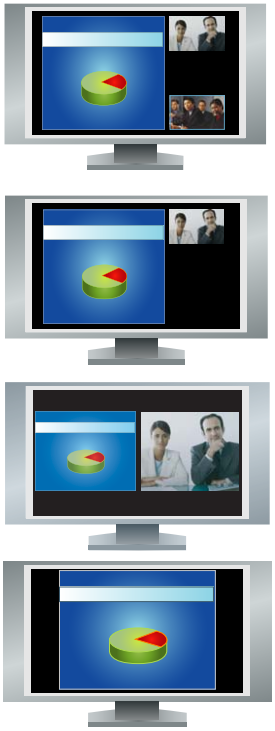
During calls using Dual Monitor Emulation with content, you can press the **Display** button on the remote control to scroll through the following screen layouts:



1. Content big, far and near sites small
2. Content big, far site small
3. Content and far site same size
4. Content, full screen

Polycom HDX 8000 series systems with Hardware Version B can only show two windows in Dual Monitor Emulation.

Showing, Moving, and Turning Off the PIP

Your system may be configured to display a Picture-in-Picture (PIP) window. During a call on a single-monitor system, the PIP displays what your main camera is sending to the far site. If the far site shows any type of content, the content appears in the main part of the screen, and the PIP changes to show the people at the far site.

During a call on a dual-monitor system, what you see on each monitor and in the PIP depends on how the Polycom HDX system has been configured.

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

- Press **Display** on the remote control to display the PIP on screen.
- While the PIP has a yellow border, press **Display** repeatedly to move it to different corners of the screen.
- After a brief pause, the PIP border turns blue. Then, press **Display** to turn the PIP off.

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

1. If the PIP is not showing, press **Display** on the remote control to display the PIP on screen.
2. Press **Camera** and select the **Swap PIP** icon.

Specifying When to Display the PIP

Your system may be configured with specific default behavior for the PIP in calls. If your system administrator has allowed access to user settings, you can show, move, or hide the PIP as needed after a call connects.

To specify when to display the PIP:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Select **Next** to see more settings.
4. Scroll to **PIP**, press , and select one of these settings:

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

5. Press **Home** to save your change and return to the home screen.

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Controlling What You Hear

Adjusting Volume

Use the remote control to raise or lower the volume of the sound you hear.

To adjust the volume:

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

Changing the volume affects only the sound you hear at your site.

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:

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

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 does not mute audio coming from any device connected to the VCR or content audio inputs.
- The microphone may automatically mute when the system is asleep or is waiting for you to log in.
- The microphone may automatically mute when the system automatically answers an incoming call.

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 may detract from the stereo audio experience.

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

Showing Content

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

- Any information stored on a computer
- 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 may be able to show content that is stored on a computer. When you show content from a computer, the far site can see you and what you see on the computer screen.

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

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.

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.
- People+Content must be enabled on the Polycom HDX system.
- 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 2000, or Windows Vista operating system, open a web browser and go to the Polycom web site at www.polycom.com/support.
2. Navigate to your product page.
3. Download and install the People+Content IP software.

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To start showing content:

1. On the computer, start the Polycom People+Content IP application.
2. Enter the IP address or DNS host name of your video conferencing system and the meeting password, if one is set.
3. Click **Connect**.
4. Open the content you want to show, and do one of the following:
   - Click in People+Content IP.
   - Press **Content** on the video conferencing system's remote control.

To stop showing content:

1. If the People+Content IP toolbar is minimized, maximize it by clicking the icon in the task bar.
2. Do one of the following:
   - Click in People+Content IP.
   - Press **Content** on the video conferencing system's remote control.

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

Showing Content from a Computer Connected Directly to the System

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

Polycom HDX 8000 series and Polycom HDX 7000 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

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Polycom HDX 9000 series

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, go to your computer's Display Control Panel.

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 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.

2. Press **Content** on the remote control or press **Camera** and select the computer input.

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

To stop showing content:

- Press **Content** on the remote control or press **Camera** and deselect the computer input.

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

Depending on how your system is configured, you may 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:

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

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

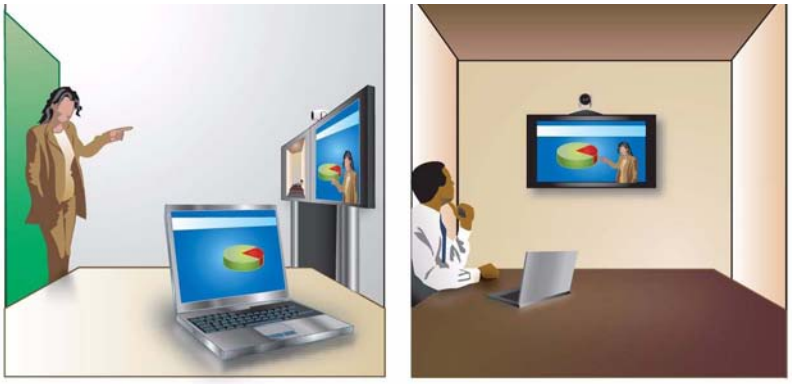
1. Press **Camera** on the remote control.
2. Select a content source.
3. Press on the remote control.

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

1. Press **Camera** on the remote control.
2. Select the main camera.
3. Press on the remote control.

Showing Content with People on Content™

The 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.

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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. Press **Option** on the remote control.
3. Select **People on Content**.

   The camera moves to the preset location. Content is displayed in place of the background. The camera preset and default content video source are configured by the administrator. You can adjust the camera or choose a different video source after you start showing content with People on Content.

To stop showing content with People on Content:

1. Press **Option** on the remote control.
2. Select **People on Content**.

Controlling Recording Devices

Depending on how your system is configured, you may be able to use the Polycom HDX remote control to control devices such as VCRs or DVD players that are in the room with the system. You might also be able to control a Polycom RSS™ 2000 system. The remote control buttons control the RSS 2000 by sending audible DTMF tones across the call. Contact your system administrator for more information.

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Working with Directory Entries

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

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

- **Local entries:** Information about sites that you have added. These entries are stored locally on your Polycom HDX system, and depending on your system setup, you can remove or edit these entries. You can also assign local entries to groups to make it easier to find numbers. 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.
- **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.

Searching the Directory

You can find entries in the directory by:

- Spelling the name using the number buttons on the remote control
- Entering the name using the keyboard on the Directory screen or by pressing **Keyboard** on the remote control
- Scrolling through the list of names using the **Up** and **Down** arrow buttons
- Paging through the list of names using **Zoom** on the remote control
- Selecting a specific Group to narrow your search results

Adding, Editing, and Deleting Local Directory Entries

You can create entries for point-to-point calls and multipoint calls and save them in the Polycom HDX system directory.

To add a single-site entry to the local directory:

1. Press **Directory** on the remote control.
2. Select **Options** then **New Entry**.
3. Select **One site**.
4. Specify the following information:

In this field...	Enter this information...
Name	Name that will appear in the directory list and on incoming call messages.
Group	Designation to help you quickly find the number in the directory and manage your directory entries.
Call Type	Call type to use for calls to the site. Depends on the capabilities of your system.
Call Speed	Call speed to use for calls to this site.
Number	Number to use for calling the site.
Extension	The system's extension (E.164 address).

5. Select **Update** to add the call type information and enter another call type for the entry. To remove the last call type added, select **Clear**.
6. Select **Save** to save the entry.

If you save an entry to the Contacts group, it appears on the Contacts home screen but not the Speed Dial or Sites list on the Place a Call screen.

To add a multiple-site entry to the directory:

1. Press **Directory** on the remote control.
2. Select **Options** then **New Entry**.
3. Select **Multiple site**.

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4. Add numbers to this multiple-site entry in one of these ways:
   - Select **Options > Directory**, and select an entry from the directory.
   - Enter a number manually and select **Update**.

   To remove a number, highlight it then select **Options > Delete**. The number of sites that you can add depends on the capabilities of your system.
5. Select **Save** to save the entry.
6. Enter a name for this entry as you want it to appear in the directory list.

To edit an entry:

1. Press **Directory** on the remote control.
2. Find the entry you want to edit.
3. Select **Options** then **Edit Entry**.
4. Edit the information as needed.
5. Select **Options** then **Save** to save your changes and return to the directory. If the entry you edited was a global entry, your changes are saved as a local copy.

To delete an entry:

1. Press **Directory** on the remote control.
2. Scroll to the entry you want to delete.
3. Select **Options** then **Delete Entry**. You cannot delete a global entry.

Grouping Directory Entries

Grouping directory entries can make it easier to find numbers. Polycom HDX systems support global groups and local groups. Global directory entries are assigned to a global group by your system administrator. You cannot edit or delete global directory groups.

The default local directory group is the Contacts group. The Contacts group can contain local directory entries, default LDAP group members, Speed Dial or Sites list entries, and Contacts stored by the presence service. Depending on your system setup, you can create, remove, and edit local groups.

The Sample Sites group includes Loopback entries and various Polycom regional sites that you can use to place test calls.

To create a new local group:

1. Press **Directory** on the remote control.
2. Select **Group**.
3. Select **Edit Groups**.
4. Enter a group name.
5. Press **Back** or an arrow button on the remote control to save the new group.

To delete a local group:

1. Press **Directory** on the remote control.
2. Select **Group**.
3. Select **Edit Groups**.
4. Scroll to the group name you want to delete, and then select **Delete**.

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

To assign an entry to a local group:

1. Press **Directory** on the remote control.
2. Scroll to the entry you want to assign to a group.
3. Select **Options** then **Edit Entry**.
4. Select the **Group**.
5. Select **Save** to save your changes and return to the directory. If the entry you edited was a global entry, your changes are saved as a local copy. If you save an entry to the Contacts group, it appears on the Contacts home screen but not the Speed Dial or Sites list on the Place a Call screen.

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Refreshing Entries from the Polycom Global Directory Server

The global directory entries are periodically refreshed on systems registered to the Polycom Global Directory Server. You can also manually refresh the global directory entries on your system.

To manually refresh Polycom GDS entries:

1. Press **Directory** on the remote control.
2. Select **Group > Polycom GDS**.
3. Select **Options > Refresh**.

Working with Contacts

The Contacts home screen displays all entries in your Contacts list. Depending on the configuration of your system, and whether it is automatically provisioned and registered to a global directory server, Contacts may include local directory entries, default LDAP group members, Speed Dial or Sites list entries, and Contacts stored by the presence service.

If the system is registered with a global directory, you could see the following icons next to Contacts on the Contacts home screen.

Icon on the Polycom HDX system	Presence State
	The system is set to Available and is registered with a presence service.
	• The system is set to Busy and is registered with a presence service. or • The system is set to Available but is in a call and is not available to receive another call.
	The system is set to Available and is registered with a presence service. It is in a call but is available to receive another call.
	The presence state is unknown. The Contact is a local entry or is not registered with a presence service.
	The system is powered off or is offline.

You can view Contact details in the system's local interface. Highlight the Contact and press or . A dialog appears with the display name, address, call speed, group, and presence information.

Adding Contacts

If your system is provisioned by a Polycom Converged Management Application™ (CMA™) system, you can add up to 200 Contacts stored by the presence service. When you add a presence service Contact, you are both automatically added to one another's Contacts lists. Presence service Contacts appear with the display name followed by the device type. If the Contact has more than one device, each one is added as a separate entry on your Contacts list.

When you add a Contact, the entry is added to the Contacts home screen. Unless the entry is stored by the presence service, it is also added to the Speed Dial or Sites list on the Place a Call screen.

To add a Contact from the home screen:

1. Select **Add a Contact.**
2. Find or create an entry.
3. Highlight the entry and press on the remote control.

To add a Contact from the Directory screen:

1. Find or create an entry.
2. Highlight the entry and press on the remote control.
3. Choose **Option > Add to Contacts**.

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Deleting Contacts

You remove a Contact from the Contacts group by deleting it.

When you delete a presence service Contact, or a presence service Contact rejects your invitation using Polycom CMA Desktop, you are deleted from one another's Contacts lists.

To delete a Contact:

1. Find the Contact in the directory Contacts group or on the Contacts home screen.
2. Highlight the Contact and do one of the following:
   - Press on the remote control, and then select **Yes**.
   - Press on the remote control, and then select **Options > Delete Entry**.

The Contact is deleted from the Contacts home screen. When you delete a Contact that was added to the Speed Dial or Sites list on the Place a Call screen, the entry is deleted from both screens.

You cannot delete default Contacts that come from the global directory server.

Including Multiple Sites in Calls

Your system may 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™.

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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 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.

- For calls hosted by a Polycom HDX system, you can define a multiple-site directory entry to call all of the sites at one time. Alternatively, you can place a call to the first site, and then add other sites after the first call connects. The other sites can call the Polycom HDX system to join the call.
- For calls hosted by a bridge, you may need to enter calling information about all of the sites before the call begins. Contact your system administrator for more information.

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

1. Call the first site.
2. When the call connects, press **Call** on the remote control.
3. Place a call to the next site.
4. Repeat steps 2 and 3 until all sites are connected.

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

1. Press **Directory** on the remote control.
2. Find the multiple-site entry in the directory list.
3. Press **Call** to place the call.

To place a cascaded multipoint call:

1. Place a multiple-site call from the directory, or place calls one at a time to several other sites.
2. Ask each site to call additional sites.

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Supplying a Password for Multipoint Calls

Hosts of multipoint calls sometimes require you to enter a password in order to join a conference. Depending on your system configuration, you can set up the system to enter the meeting password for you. Contact your system administrator for more information.

To configure a meeting password:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Enter the password in the **Meeting Password** field in one of these ways:
   - Press the remote control number buttons, using the text-entry method commonly used with cell phones.
   - Press **Keyboard** to use the onscreen keyboard to enter characters.
4. Press **Home** to save your change and return to the home screen.

If you need to generate touch tones (DTMF tones), press # on the remote control, or press and choose **Touch Tones**. Then use the remote control number buttons.

About 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.

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Setting	Description
Video images from multiple sites can be automatically combined on one screen in a display know 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.
Discussion 	Multiple sites are displayed in continuous presence. The current speaker's image is highlighted. **Systems with:** — **See this:** Single monitor — Multiple sites, each in its own window Dual monitors — Speaker on second monitor with other sites on first monitor, or one far site on each monitor
Presentation 	The speaker sees continuous presence while the other sites see the speaker in full screen. **Systems with:** — **See this:** Single monitor — Speaker in full screen Dual monitors — Speaker on the first monitor and near site on the second monitor
Full Screen 	The site that is speaking is shown in full screen to all other sites. The current speaker sees the previous speaker.

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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 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 a web browser.
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.

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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

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

Temporarily Refusing Calls

Depending on your system configuration, 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:

➢ On the home screen, change the Availability Control from **Available** to **Busy**.

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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. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. If you want to automatically answer incoming point-to-point video calls, set **Auto Answer Point-to-Point Video** to **Yes**.
4. If you want to automatically answer incoming multipoint video calls, set **Auto Answer Multipoint Video** to **Yes**.
5. Press **Home** to save your change and return to the home screen.

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 press **Mute** on the remote control when you're ready to unmute the call.

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

To mute automatically answered video calls:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Scroll to **Mute Auto Answer Calls** and press on the remote control to enable the option.
4. Press **Home** to save your change and return to the home screen.

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Logging In and Out

Depending on how your system is configured, you may have to log in when the system comes out of sleep mode.

To log in:

1. When the Login screen appears, press **Keyboard** or use the number buttons on the remote control to enter the User ID.
2. Enter the account password. To enter numbers, use the number buttons on the remote control. To enter letters, press **Keyboard** on the remote control.
3. Select to log in.

Depending on how your system is configured, you may get locked out after a certain number of failed login attempts. Contact your system administrator for more information.

To log out:

- Press **Option** on the remote control and select **Logout** to log out manually.
- The system automatically logs out the current account when the system goes to sleep.

Using a Polycom SoundStation® IP 7000 Conference Phone with a Polycom HDX System

When you connect a Polycom SoundStation® IP 7000 conference phone to a Polycom HDX system, the conference phone becomes another interface to dial audio or video calls. The conference phone operates as a microphone, and as a speaker in audio-only calls.

For more information, refer to the SoundStation IP 7000 documentation available on the Polycom web site.

To answer a call using a connected SoundStation IP 7000 conference phone:

- Press the **Answer** soft key on the conference phone.

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To place a point-to-point call using a connected SoundStation IP 7000 conference phone:

1. Press on the conference phone and press the **Video** or **Phone** soft key.
2. On the conference phone keypad, enter one of these:
   - The IP address (for example, 10*11*12*13) of the site you want to call
   - The phone number (for example, 19784444321) of the site you want to call

   To enter letters, press the **ABC** soft key. To enter a dot or @ symbol, press the **ABC** soft key then key multiple times.

You can also place calls using the conference phone's directory or the redial key.

The indicators on the conference phone are green when the system is in a call and audio is not muted.

To place a multipoint call using a connected SoundStation IP 7000 conference phone:

1. Call the first site.
2. When the call connects, press the **Add Video** or **Add Phone** soft key on the conference phone.
3. Place a call to the next site.
4. Repeat steps 2 and 3 until all sites are connected.

To control volume in a call using a connected SoundStation IP 7000 conference phone:

- Press the and keys on the conference phone to adjust the volume of audio from the far site.

You can also adjust the volume using the volume buttons on the Polycom HDX system remote control.

To mute audio in a call using a connected SoundStation IP 7000 conference phone:

- Press the **Mute** key on the conference phone.

You can also mute the audio using the mute button on the Polycom HDX system remote control or on a connected Polycom HDX microphone.

The indicators on the conference phone are red when your audio is muted. The near-site mute icon also appears on the monitor display.

To end a call using a connected SoundStation IP 7000 conference phone:

- Press on the conference phone to hang up all connections.
- Press the **More** softkey then the **Manage** softkey to hang up one connection in a multipoint call.

To start or stop showing content using a connected SoundStation IP 7000 conference phone:

- Press the **Content** soft key on the conference phone. Content plays from the following input if that input is configured for Content:
  - Camera 4 or Camera 5 on a Polycom HDX 9000 series system
  - Camera 4 on a Polycom HDX 8000 series system
  - Camera 3 on a Polycom HDX 7000 series system

  Contact your system administrator for more information.

Using Avaya Network Features with Video Calls

Depending on how your system is configured, you may be able to use Avaya® telephony network features such as call forwarding, transferring calls, and adding additional sites in an audio-only conference.

To activate call forwarding:

1. Make sure that the Polycom system is not in a call.
2. From the Place a Call screen on the Polycom system, dial the Feature Access Code provided by the Avaya Communication Manager administrator, followed by the E.164 extension of the system to which you want to forward the calls. For example, dial *22016 if *2 is the Feature Access Code and 2016 is the system E.164.
3. Wait for confirmation beeps.

To deactivate call forwarding:

1. From the Polycom system Place a Call screen, dial the Feature Access Code provided by the Avaya Communication Manager administrator. For example, #2 if #2 is the Feature Access Code for disabling call forwarding.
2. Wait for confirmation beeps.

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To transfer a call:

1. While in a call, press # on your Polycom system remote control to access the tone pad.
2. Press **Select** to activate flash hook. The first far-site system is placed on hold.
3. Wait for a dial tone, and then dial the extension of the far-site system to which you want to transfer the call. The call connects both audio and video between the local system and the second far-site system. The first far-site system is still on hold.
4. Hang up the near-site system. The two far-site systems are now connected in a call with audio and video, if the capabilities are present.

To add a system to a call:

1. While in a call, press # on the Polycom system remote control to access the tone pad.
2. Press **Select** to activate flash hook. The far-site system is put on hold.
3. Wait for a dial tone, and then dial the extension of the system that you want to add to the call.
4. Press **Select** again. The call becomes an audio-only conference with all of the systems. If the system that dialed the flash hook hangs up, the other systems will be connected in a call with audio and video, if the capabilities are present.

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. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Scroll to **Far Control of Near Camera** and press to enable the option.
4. Press **Home** to save your change and return to the home screen.

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

Displaying the Far Site's Name When the Call Connects

If your system administrator has allowed access to user settings, you can specify whether to display the far site's name when the call connects and how long to leave the name on the screen.

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

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Select **Next** to see more settings.
4. Scroll to **Far Site Name Display Time**, press on the remote control, and select to display the far site's name during the entire call, for a specified time, or not at all.
5. Press **Home** to save your change and return to the home screen.

Hearing Audio Confirmation When You Dial

If your system administrator has allowed access to user settings, you can set up the system to speak each number as you enter it in the dialing entry field on the Place a Call screen.

To enable audio confirmation:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Select **Next** to see more settings.
4. Scroll to **Keypad Audio Confirmation** and press on the remote control to enable the option.
5. Press **Home** to save your change and return to the home screen.

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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 will not make content from a computer or a document camera appear brighter.

To turn backlight compensation on:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Scroll to **Backlight Compensation** and press on the remote control to enable the option.
4. Press **Home** to save your change and return to the home screen.

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