POLYCOM®

Getting Started Guide
for the V500™ System

July 2004 Edition
3725-21742-002/A

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Getting Started Guide
for the V500™ System

When you connect a Polycom® V500 system to your TV, you're providing your home office or small business with all the essential tools you need for video conferencing. With a V500 system, you can meet with people anywhere in the world, as if they were in the room with you. Everyone's productivity increases, without any travel required.

It's easy to place video calls with the V500 system. You also have the flexibility to create your own directory of numbers, change the way calls are answered, and customize what you see on the screen.

Before you place your first call with your V500 system, use this guide to get some basic "how-to" information. This guide includes overview information that you may find helpful when you're just starting to learn about the capabilities of the system or when you have experience, but you need a quick refresher.

System Basics

Using the Remote Control

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

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

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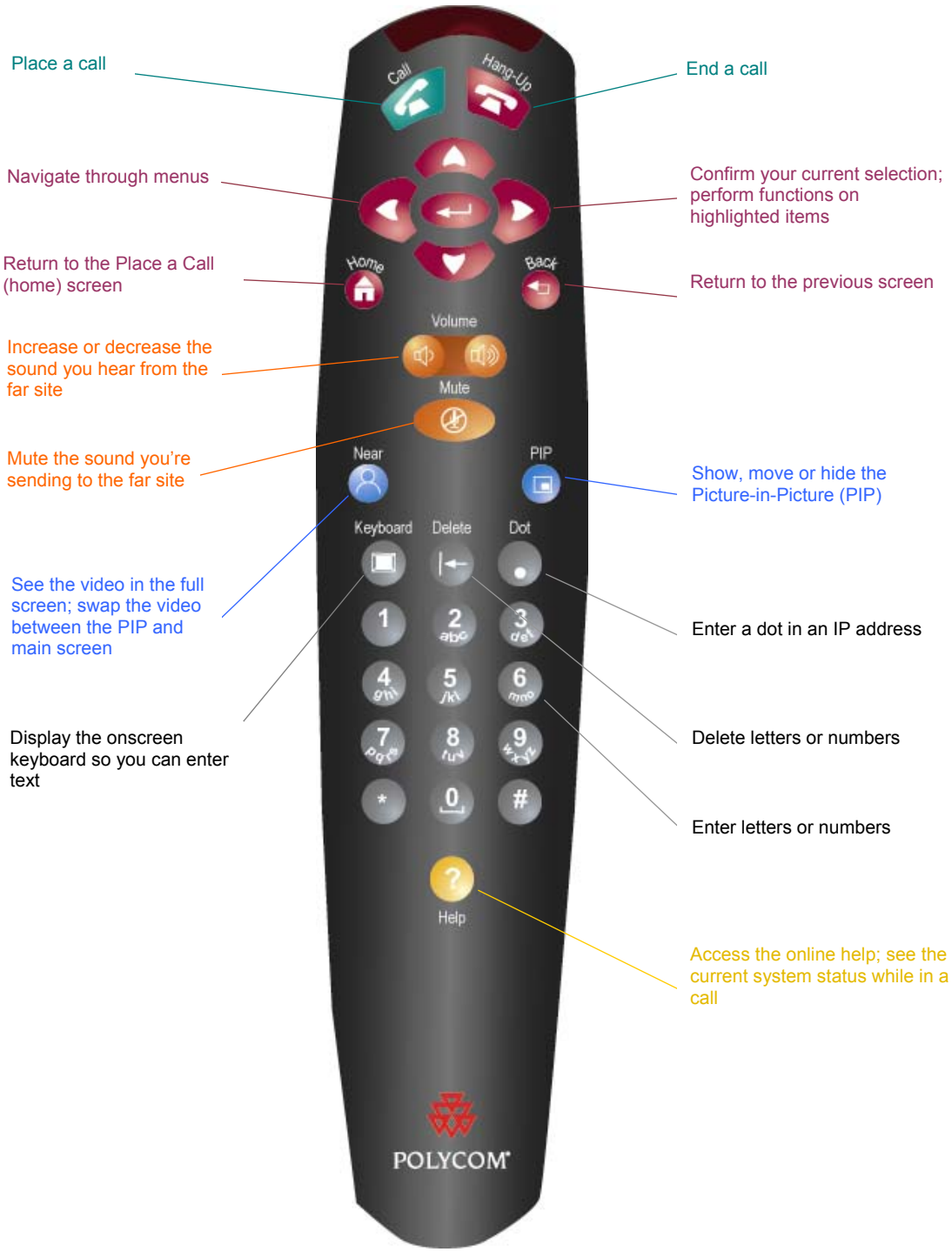
V500 System Remote Control



Getting More Information

If you need additional information about using the V500 system, try these resources:

- To view help while you're using the system, press **Help**.
- For network questions, contact your network service provider.
- For system questions, contact Polycom Technical Support at www.polycom.com/support.

Calling and Answering

Answering a Video Call

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

The V500 system can answer incoming calls in one of these ways:

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

To answer the call manually:

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

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

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

If you see **Near** on your screen, then your system is configured to automatically mute your audio when a call comes in. To unmute your system, press **Mute** on the remote control.

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Placing a Video Call

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

- Using the directory
- Entering a name or number
- Choosing from a list of recently called sites
- Choosing a site from the **Contacts** or **Speed Dial** list on the Place a Call screen, if you have configured your system to have one

Calling by Using the Directory

The directory is a list of names and numbers that's stored locally on the V500 system.

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

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

To place a call from the directory:

1. Select **Directory** from the Place a Call screen.
2. Find the entry to call by:
   - Spelling the first or last name using the number buttons on the remote control.
   - Pressing **Keyboard** to use the on-screen keyboard to spell the name.
   - Scrolling through the list of names using the arrow buttons on the remote control.
   - Using the alphabet tabs to move through the directory and then scrolling to the name you want.
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.

Calling by Entering a Name or Number

To place a call by entering a name or number:

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

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

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

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

3. Press **Call** 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.

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Calling from the Recent Calls List

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

To place a call from the Recent Calls screen:

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

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

Calling from the Contacts or Speed Dial List

Depending on how you configured your system, you may be able to quickly access calling information for specific sites using the Speed Dial or Contacts list on the Place a Call screen.

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

1. Select **Speed Dial** or **Contacts** from the Place a Call screen.
2. Scroll to the entry you want to call.
3. Press **Call** to place the call.

Ending a Video Call

To hang up from a call:

>> Press **Hang Up**.

Types of Video Calls You Can Make

Depending on the V500 system model you purchased, you may be able to make either ISDN or IP calls (or both). The following table lists all 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 in the Extension field, after the gateway number, or wait until the gateway prompts you for the extension and then use the remote to enter it.
LAN	Same LAN	Alias, E.164 address, or IP address
	Different LAN	Access code of the near-site gateway, the selected speed code, the ISDN number 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 and then use the remote to enter it.
	ISDN	Access code of the near site's gateway, the selected speed code, and the ISDN number of the far site.

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

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

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Placing and Ending an Audio-only Call

If you have an ISDN line connected to your V500, you can use your system to make audio-only calls in addition to using your system to place video calls.

Placing an Audio-only Call

To place an audio-only call from your system:

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

Ending an Audio-only Call

To hang up from an audio-only call:

>> Press **Hang Up** on the remote control.

If the person on the telephone hangs up first, you need to disconnect the call from the V500 system, just as you would hang up a telephone receiver in a regular phone call.

Controlling What You See

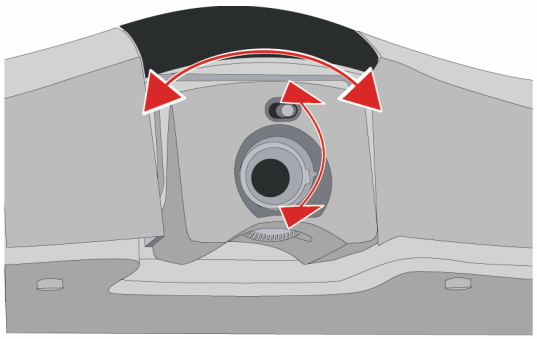
You can control what you see during a call by moving and focusing your camera, switching views, and adjusting the PIP.

Adjusting a Camera

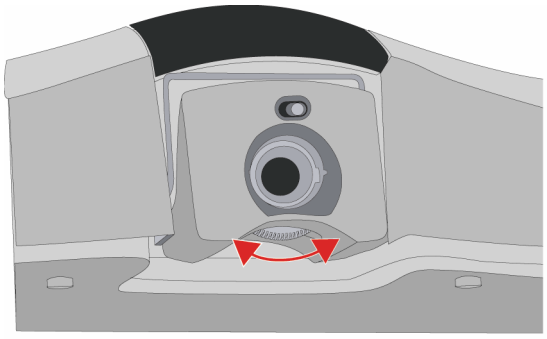
You can pan and tilt the camera manually, and you can use the focus wheel to focus the camera.

To adjust the camera:

1. Adjust the camera by moving the camera up, down, to the left, or to the right:



2. Focus the camera by turning the focus wheel:



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Switching Between Full Screen Video and the Home Screen

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

To learn about adjusting user settings, see Customizing Your Workspace on page 19.

To see the video in the full screen:

>> Press **Near**.

To see the Place a Call screen:

>> Press **Home**.

Showing, Moving, and Turning Off the PIP

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

For example, during a call, the PIP displays what your main camera is sending to the far site. (This lets you adjust the camera if you need to.) 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.

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

- Press **PIP** to turn the PIP on.
- While the PIP has a yellow border, press **PIP** repeatedly to move it to different corners of the screen.
- After a brief pause, the PIP border turns blue. Then, press **PIP** to turn the PIP off. The PIP setting remains in effect until you change it or system is restarted.

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

1. If the PIP is not showing, press **PIP** to turn the PIP on.
2. Press **Near** twice and select the **Swap PIP** icon.

Controlling What You Hear

Adjusting Volume

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

To adjust the volume:

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

Muting the Microphone

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

To mute or unmute the microphone:

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

Receiving Content

Some video conferencing systems, such as the Polycom VSX™ 7000 system, can send content during a video call. The content could be, for example, a file stored on a PC or a paper document or object placed on a document camera.

If you are in a video call with a V500 system and the far site sends content, the content automatically appears on your screen. The content remains on the screen until the far-site system stops sending it.

If you are displaying the PIP when content is sent, you see the content in the main part of the screen and, in the PIP, you see the people at the far site.

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Working with Directory Entries

The directory on your V500 system stores dialing information that helps you make calls quickly and easily. When a site listed in the directory calls your system, the system displays the name on the screen when the call comes in. If a site that calls you is not listed in the directory, you are prompted to save the call information in the directory when the call ends.

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

- **Local entries:** Information about sites that you have added, sites that you have called, and sites that have called you. These entries are stored locally on your V500 system, and depending on your system setup, you can edit these entries. You can also assign local entries to categories to make it easier to find numbers. Local entries are available to anyone who uses the system.
- **Global entries:** Information about other active sites that are registered with the same Global Directory Server. These entries are stored on the Global Directory Server, and you cannot edit them. You can make a local copy if you want to make changes. Global entries are marked with .

Adding, Editing, and Deleting Directory Entries

You can create entries for calls and save them in the V500 system's directory. Everyone at your site who uses the system can use the entries you create, and you can use the entries created by others. You can also edit the information in any local entry. Users at other sites cannot access the local entries on your system.

To add an entry to the directory:

1. Select **Directory** from the Place a Call screen.
2. Select **New**.

3. Specify the following information:

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

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

To edit an entry:

1. Select **Directory** from the Place a Call screen.
2. Scroll to the entry you want to edit and then select **Edit**.
3. Edit the information as needed.
4. Select **Save** to save your changes and return to the directory.

To delete an entry:

1. Select **Directory** from the Place a Call screen.
2. Scroll to the entry you want to delete and then select **Delete**.

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

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Categorizing Directory Entries

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

To create a new category:

1. Select **Directory** from the Place a Call screen.
2. Select **Category**.
3. Select **Edit Category**.
4. Enter a category name.
5. Press **Back** to save the new category.

To delete a category:

1. Select **Directory** from the Place a Call screen.
2. Select **Category**.
3. Select **Edit Category**.
4. Scroll to the category name you want to delete and then select **Delete**.

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

Participating in Calls with Multiple Sites

You can use the V500 system to participate in multipoint conferences. During a multipoint conference, a multipoint conferencing unit (MCU) enables the video to switch between sites so that you can always see and hear the participant who is speaking. You can also receive content in a multipoint call, just as you can in a point-to-point call.

The V500 system enables you to participate in multipoint calls that use an external MCU. With an external MCU, the call can:

- Include as many sites as allowed by the particular MCU
- Support IP, ISDN, or both

Supplying a Password for External MCU Calls

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

To configure a meeting password:

1. Select **System** 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:
   - Pressing the remote control number buttons, using the text-entry method commonly used with cell phones.
   - Pressing **Keyboard** to use the on-screen keyboard to enter characters.
4. Press **Home** to save your change and return to the Place a Call screen.

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 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.

Chair control is available in a call only if it is allowed by the external MCU.

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

1. On a PC, open a web browser.
2. In the browser address line, enter the system's IP address, for example, http://255.255.255.255, to go to the V500 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 multipoint call.

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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 controls to the selected site	**Release Chair**
	View the selected site's video. This does not change what other sites see.	**View Site**
	Return to viewing the video selected by the chair or the MCU	**Stop Viewing Site**
	Send the selected site's video to the other sites	**Select Broadcaster**
	Remove the selected site from the conference	**Disconnect Site**
	Disconnect all sites and end the call	**End Conference**
Participant	Request control of the conference	**Acquire Chair**
	View the selected site's video. This does not change what other sites see.	**View Site**
	Return to viewing the video selected by the chair or the MCU	**Stop Viewing Site**

Changing the Way Calls Are Answered

Depending on how you have configured the system, you may be able to choose the way the system handles incoming calls.

Temporarily Refusing Calls

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

To temporarily refuse incoming calls:

1. On the Place a Call screen, select in the lower right corner of the screen.
2. Select **On** to set Do Not Disturb.

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

Answering Calls Automatically

You can specify whether to answer calls automatically or to have the system announce incoming calls and wait for you to answer manually.

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

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

To automatically answer calls:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Scroll to **Auto-Answer Point to Point**, press , and select **Yes**.
4. Press **Home** to save your change and return to the Place a Call screen.

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Muting Automatically Answered Calls

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

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

To mute automatically answered calls:

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

Scheduling Meetings

You can use the calendar and call scheduling feature of the V500 to schedule video conferences. When you schedule a meeting using this feature, the system automatically calls the site you selected on the date and time you specified. For recurring meetings, you can indicate whether you want the system to automatically make the call daily, weekly, or monthly.

To schedule a meeting:

1. Select **System** from the Place a Call screen.
2. Select **Utilities** from the System screen.
3. Select **Call Scheduler** from the Utilities screen.
4. Select **New Entry** from the Call Scheduler screen.
5. Select the site to call from the Directory.
6. Select the date and time for the call.
7. Select **Next** and specify whether the meeting recurs.

On the scheduled time and date, your V500 system will automatically call the selected site.

To view scheduled meetings in the calendar:

1. Select **System** from the Place a Call screen.
2. Select **Utilities** from the System screen.
3. Select **Calendar** from the Utilities screen.

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

Customizing Your Workspace

You can customize what you see on the screen, depending on how your system is configured. You can change these options before you place a call and when the system is in a call.

Specifying When to Display the PIP

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

To specify when to display the PIP:

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

Select this setting...	To show the PIP...
Auto	On connection and when you pick up the remote.
On	On connection and during the call.
Off	Only when you press **PIP**.

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

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Displaying the Far Site's Name When the Call Connects

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

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

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Select to see more settings.
4. Scroll to **Far Site Name Display Time**, press , 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 Place a Call screen.

Hearing Audio Confirmation When You Dial

You can set up the system to speak each digit 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 to see more settings.
4. Scroll to **Keypad Audio Confirmation** and press to enable the option.
5. Press **Home** to save your change and return to the Place a Call screen.

Adjusting for Room Lighting

You can use the backlight control to adjust the brightness of the video that the camera sends to the V500 system. Backlight compensation adjusts the camera's iris to take in less light. Adjusting this setting can be helpful when the room arrangement results in strong light coming from behind the people in the picture.

To turn backlight compensation on:

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

Setting Camera Brightness

With a V500 system, you can set the camera brightness. Like the backlight compensation setting, this setting adjusts the camera’s iris. If there is a lot of light in the room, set the camera brightness to a low number so the camera takes in less light. If the room is dark, set the camera brightness to a high number so the camera takes in more light. The default is 11.

To set the camera brightness:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Scroll to **Camera Brightness**, press , and select the brightness level.
4. Press **Home** to save your change and return to the Place a Call screen.

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Changing the System Color Scheme

You can select from a variety of color schemes for your V500 system screens.

To change the color scheme:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Select to see more settings.
4. Scroll to **Color Scheme**, press , and select one of the color schemes.
5. Press **Home** to save your change and return to the Place a Call screen.

Enabling Dual Monitor Emulation

With dual monitor emulation (also called split-screen viewing), you can see both the near and far sites on one monitor.

To enable dual monitor emulation:

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

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

Video Conferencing Tips

Read through these quick tips for ideas on how to optimize your video conferencing experience.

Tips for Great Video

- Avoid wearing bright colors, all-light or all-dark clothing, or very "busy" patterns (such as small checks or narrow stripes). Light pastels and muted colors look the best on the screen.
- If there are windows in the room, close any drapes or blinds. Daylight is a variable light source and can conflict with interior room lighting.
- Use natural gestures when you speak.
- When adjusting your camera, try to fill the screen as much as possible with people rather than with the table, chairs, walls, or the floor.

Tips for Great Audio

- Speak in your normal voice without shouting.
- Ask the people at the other site if they can hear you. Have them introduce themselves so you can be sure that you can hear them.
- Since the audio has a very slight delay, you may want to pause briefly for others to answer you or to make comments.
- As with any call, try to limit side conversations.

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