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# Polycom ReadManager LX100 Scheduling in Outlook

September 2004

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P/N: 1725-18015-001 A

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## About This Guide

Polycom ReadManager LX100 comes with a Microsoft Outlook component that enables videoconferences to be scheduled and managed directly from the Microsoft Outlook window.

This guide describes how to use these scheduling features in Microsoft Outlook.

If you have not yet installed the Polycom ReadManager LX100 component for Outlook, see [Setting Up Microsoft Outlook for Use with Polycom Video Conferencing](#) on page 39.

Scheduling features can also be accessed and used from the web-interface of Polycom ReadManager LX100. Complete information about setting up Polycom ReadManager LX100 and using scheduling features from the web-interface is covered in *Polycom ReadManager LX100 Scheduling Administrator's Guide*.

**Note:** This book focuses on scheduling and managing videoconferences. However, not all resources scheduled through Polycom ReadManager LX100 need to include video capabilities. Your Polycom ReadManager LX100 network may include non-video or audio-only resources. You can even use Polycom ReadManager LX100 to schedule conference rooms, without scheduling equipment. These can be scheduled for conferences in the same way you would schedule a video resource.



## Videoconference Features in Outlook

Videoconferences can be scheduled and managed from your Calendar in Microsoft Outlook. When you schedule a videoconference, Polycom RediManager LX100 reserves people, bandwidth and resources (equipment, rooms, and so forth) for a particular date and time. It checks other planned conferences, compares them against the maximum video bandwidth settings, and either allows the conference to be scheduled, or suggests that you select a different time.

After the Microsoft Outlook component of Polycom RediManager LX100 has been installed on your computer, a new menu appears on the Microsoft Outlook menu bar: the Video menu.



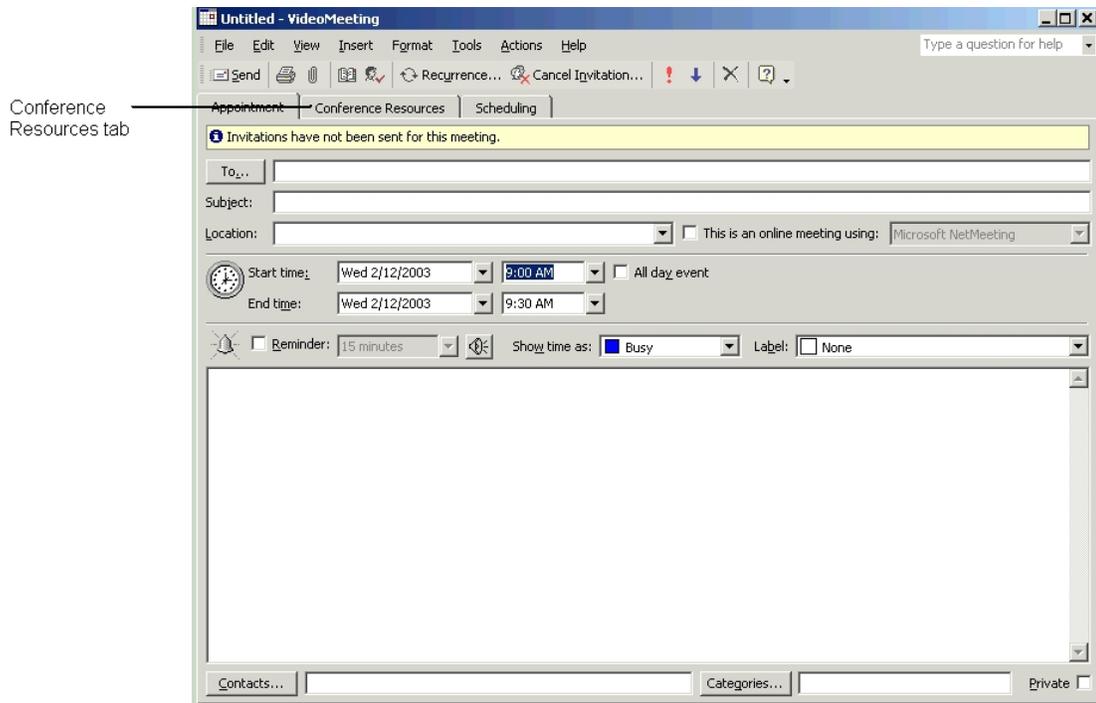
The Video menu contains these commands:

- **Logon Settings.** During the installation of the Microsoft Outlook component, a few questions are asked that will automatically populate your login information. Unless your logon information changes, you won't need to change these settings. (For details, see [Logging On from Microsoft Outlook](#) on page 41.)
- **Update Calendar.** Use this command to update your Outlook Calendar with scheduled conferences entered in the RediManager LX100 web interface. In most situations this will not be necessary to perform on a regular basis. (For details, see [Updating Your Calendar with Scheduled Videoconferences](#) on page 28.)
- **Manage Conferences.** Use this command to make changes to conferences that are already scheduled or are currently in progress. (For details, see [Managing Scheduled Conferences](#) on page 29.)
- **Help.** Use this command to see information about how to use Polycom RediManager LX100.
- **About.** This command shows the version number of Polycom RediManager LX100 and provides a link to the Polycom web site.

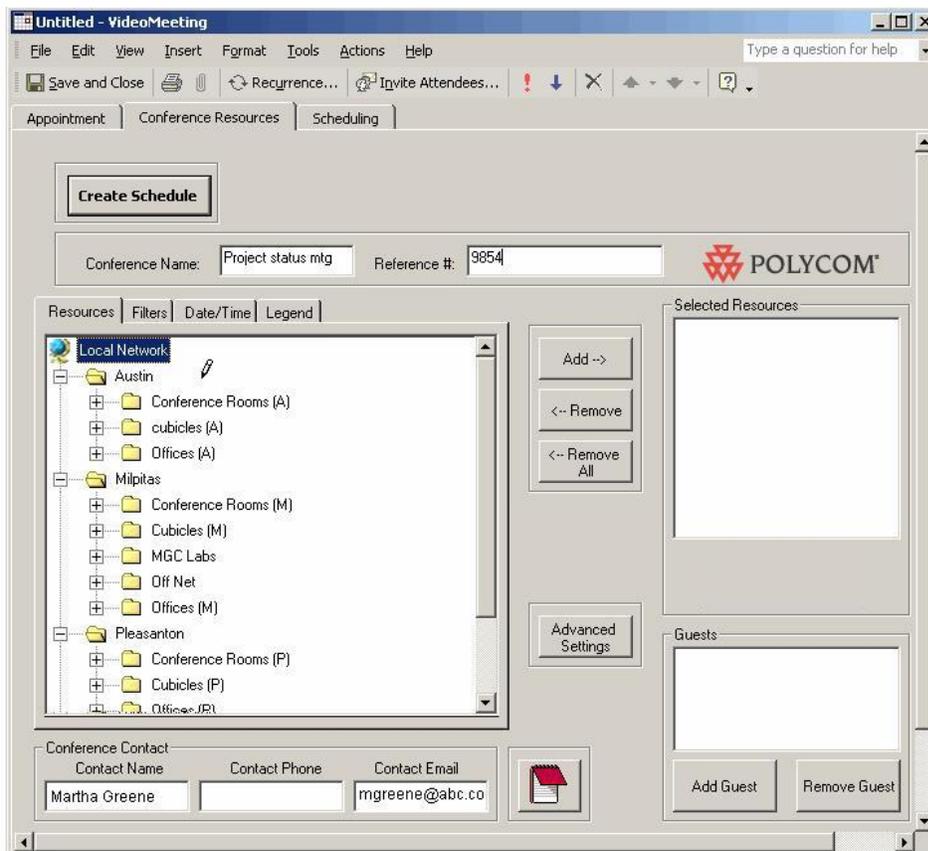
In addition to the Video menu, you'll find a new tab in the Appointment or Meeting Request window that enables you to schedule videoconferences, as described on the next page.

## Scheduling a Videoconference

Scheduling a videoconference in Microsoft Outlook is started just as you would schedule any other appointment or meeting. When you create an appointment, a new tab—the Conference Resources tab—appears in the Outlook Appointment or Meeting Request window.



A view of your video network appears here. You can expand the areas to see zones and resources.



Because scheduling of videoconferences is done right in the meeting request window, you can also use the Appointment and Scheduling tabs to invite individuals to the meeting, enter notes, and attach documents, just as you would for any other meeting.

Scheduling with Polycom ReadManager LX100 includes many features. You can:

- Use filters to narrow the available resources to those that match the equipment, conference room type, and room attributes you need.
- Request a specific date and time, or let ReadManager LX100 suggest an available time for the resources desired.
- Add a guest (a participant who is not on this video network).
- Change from the default settings for call speed, conference auto-start or not, the video layout mode for multipoint calls.

**Note:** The particular features available in to you depend in part on the user permission set by your Polycom ReadManager LX100 administrator. Some features may not be available to all users.

The next few pages first describe the basic scheduling process and then provide details about using additional features.

## Creating the Video Meeting Request

The basic process for scheduling a videoconference includes these steps, which are explained in detail below:

- Tell Microsoft Outlook to create a new meeting
- Enter a Conference Name and Reference Number
- Click Load Network
- Select Resources and Add Guests
- Set Date and Time
- (Optional) Revise Conference Contact information
- (Optional) Adjust the advanced settings
- Click Create Schedule
- Enter any additional information on the Scheduling or Appointment tabs
- Send the meeting

### To create a video meeting request and schedule a videoconference

1. Display the Microsoft Outlook Calendar, and create a new appointment.

This can be done using any one of these methods:

- Select the New Appointment icon from the Outlook Calendar menu. 
- Select File > New > Meeting Request to send an invitation to other users in their Outlook Calendar.
- Select File > New > Appointment to enter an event on only your calendar.
- Double-click on the visible calendar where the meeting needs to start.

The Appointment tab will appear first. On this tab, people can be added to the meeting on the “TO” line, a subject can be entered, times can be selected, etc. just like any other meeting. If the meeting was created without a “TO” line simply click the Invite Attendees button to add it.

**Note:** If the people needed in the meeting have a difficult schedule to work around, start on the Appointment tab and find a time that all people can get together before proceeding to step 2, to schedule conference resources. Otherwise, go on to step 2 and select the conferences resources based on the time the resources are available and return later to the Appointment tab to select the attendees. The date and time will automatically be copied from the Resource tab.

2. Next, click the Conference Resources tab.

This tab provides the necessary information to schedule the video-related resources.

3. Click **Load Network**.

If you entered a Subject on the Appointment tab, it is entered in the Conference Name field.

If Polycom RádiManager LX100 is set up to use automatic reference numbers, you will see your billing number appear in the Reference # field.



4. If either the Conference name or Reference # is not displayed, enter it now (both are required).

The Reference # is recorded with the details of the conference and can be used for billing purposes. The Conference name will be copied back to the subject line on the Appointment tab after you click Create Conference button.

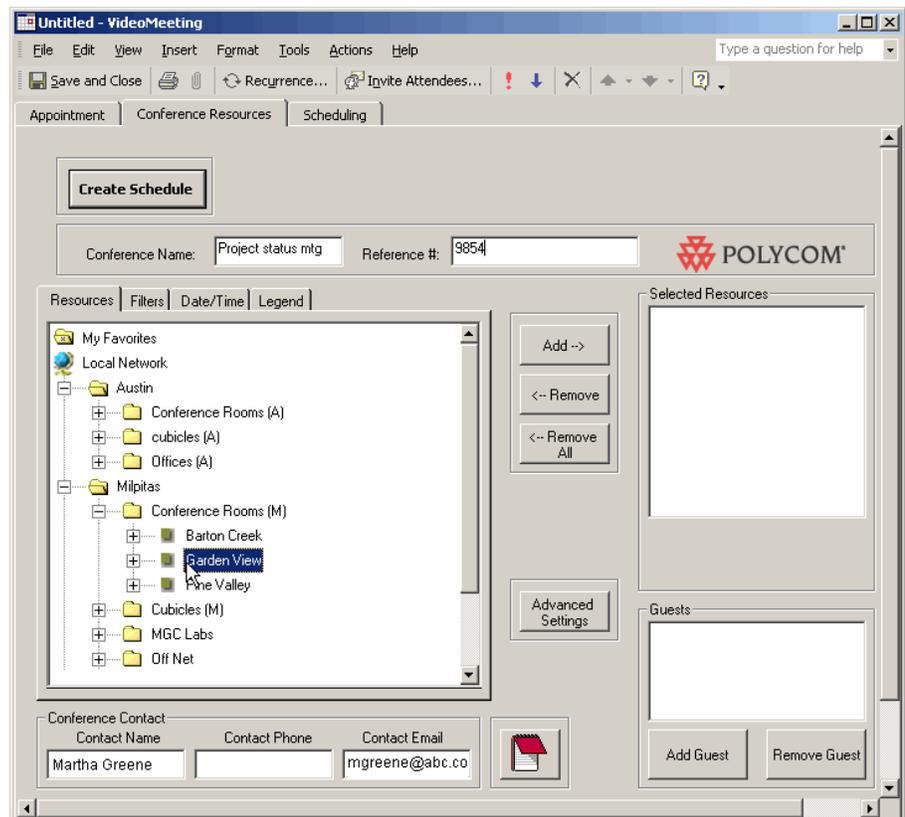
**Note:** The IT group may have set a default for the Reference #, but it can be altered just by highlighting the content and adding or replacing the information. If the Reference # automatically displays, be sure to not replace it unless that is the suggested procedure from the IT group.

5. In the list of Resources, expand the network folders by clicking the plus signs to find the resources you want.

Areas are the highest-level folders, zones are inside the areas, resources are inside the zones, and equipment is inside the resource.

It is the resource level that you will select and add to the conference.

You can also use Filters to help locate resources with particular characteristics. (For details about filtering, see page 10.)



6. Add resources to the conference by selecting the resource on the left and clicking the **Add** button to move it to the Selected Resources box on the right.

**Note:** If ReadManager LX100 determines that a multipoint call can be placed using one of the MP-capable video endpoints selected for the call, it will use the first MP-capable endpoint selected, regardless of the order displayed on screen.

Although you may see an MCU in the list of resources, do not add it explicitly to the conference as a resource. ReadManager LX100 will automatically schedule that resource behind the scenes, if it is needed.

7. Click the Date/Time tab and enter the date and times for the conference. (For details, see page 12.)

The current date and time are automatically inserted.

To make the conference a recurring conference, see [Creating Recurring Conferences](#), on page 15.

8. (Optional) Edit the Conference Contact, Contact Phone, and Contact Email, if appropriate.

This information will appear on messages about the conference that are sent to attendees. Polycom ReadManager LX100 automatically inserts your contact information.

**Note:** The conference contact is specific to this conference. In addition, there are contacts and facilitators associated with each resource and room that are added to this conference. For details, see the *Polycom RедиManager LX100 Scheduling Administrator's Guide*.

9. (Optional) Adjust the advanced settings (see [Using the Advanced Settings](#) on page 21).

**Note:** If the Advanced Settings button does not show on your screen, these features are not part of your user permissions.

10. Click **Create Schedule**.

RедиManager LX100 checks the request against other scheduled conferences for video bandwidth limits across the entire network, and checks the availability of selected resources. If everything is clear and there are no conflicts, the conference is scheduled and entered into the database.

11. If you did not yet add individuals to the meeting on the Appointment tab, do so now.

Click the Appointment tab and enter any other information if necessary.

The subject line will be filled from the conference name on the Conference Resources tab.

12. When you are finished, click **Send**.

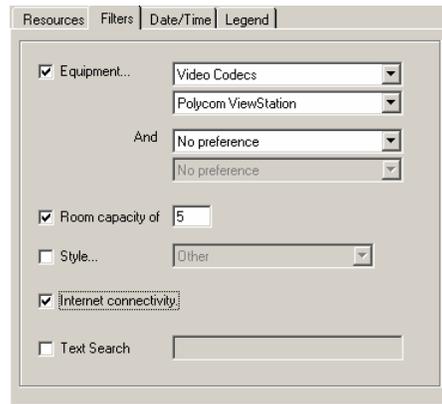
This step is required to notify all the recipients of their new conference.

All participants and facilitators connected with the conference will receive a confirmation email shortly. Those people you invited via the Appointment tab will receive a calendar notification as well.

If the user creating this conference has a user profile of "request only," a message is also sent to the Conference Administrator that the conference needs approval. For more information, see [Approving a Requested Conference](#) on page 32.

## Finding a Resource that Fits Your Needs (Filtering)

The Filters tab contains options that let you locate resources and equipment with the features you need.



The screenshot shows a dialog box with the following settings:

- Resources** | **Filters** | Date/Time | Legend
- Equipment...** (Video Codecs, Polycom ViewStation)
- And** (No preference)
- Room capacity of** (5)
- Style...** (Other)
- Internet connectivity**
- Text Search** (empty text box)

### To filter network resources

1. In the Schedule Conference screen, click the Filters tab.
2. Select the criteria that you want to match. The filter will find the resources that match all of the criteria you enter.

You can specify any of the following.

- **Equipment (type and model).** Rooms can be equipped with video endpoints, VCRs, projectors, and so forth. When trying to locate a particular room, use this filter to limit the view to just the rooms containing required equipment.

**Note:** If your network administrator has defined an equipment type called “Non-Video” or “Audio Only,” you can use it to filter for rooms without video equipment when a conference room is needed, but there is no need to use videoconferencing. This keeps the room with video equipment free for those who need to schedule a videoconference.

- **Room capacity .** The number you enter will set the minimum filter value for the number of people a room can contain. Any rooms with less than this number will not be shown as available.
- **Style of room.** Use this field to filter on rooms with a particular room layout such as classroom, large conference, small conference, and so forth.
- **Internet connectivity.** Check this box to identify only rooms that have an IP connection to the Internet
- **Text search.** Enter a resource name or nickname for which you want to search.

If you want to filter by date and time, use the Date/Time tab.

3. When you have finished entering criteria, click the Resources tab again.

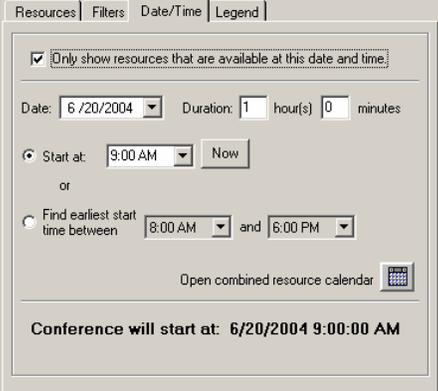
ReadiManager LX100 searches details about the resources to find matches for your criteria, and displays the filtered results in the Resources hierarchy.

**Tip:** You can toggle back and forth between the Filters and Resources tabs. Filter to find the right resource for one part of the conference, and add it to the schedule. Then Filter for another resource, add, and so forth.

**Note:** For Filtering to work effectively, characteristics of the resources and equipment in your network must be defined in the database. Lack of resources that match your request may mean that such resources are not available, or it may mean that the characteristics you are searching for were not defined for any resources. For more information, contact your Polycom ReadManager LX100 Administrator.

#### To find resources available at a particular date and time

1. On the Date/Time tab, check the box next to **Only show resources that are available at this date and time.**



The screenshot shows the 'Date/Time' tab in the ReadManager LX100 interface. At the top, there are four tabs: 'Resources', 'Filters', 'Date/Time', and 'Legend'. The 'Date/Time' tab is active. Below the tabs, there is a checked checkbox labeled 'Only show resources that are available at this date and time'. Underneath, there are input fields for 'Date' (set to 6/20/2004) and 'Duration' (set to 1 hour(s) and 0 minutes). There are two radio button options for 'Start at': one set to '9:00 AM' with a 'Now' button, and another set to 'Find earliest start time between' with two dropdown menus showing '8:00 AM' and '6:00 PM'. Below these options is a button labeled 'Open combined resource calendar' with a small calendar icon. At the bottom of the window, it displays 'Conference will start at: 6/20/2004 9:00:00 AM'.

2. Enter the date and duration for the conference.
3. Enter the desired time.
4. Click the Resources tab.

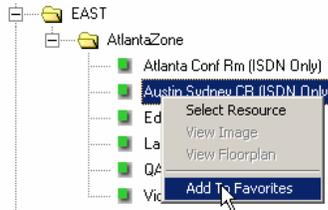
ReadiManager LX100 applies the filter and shows only those resources available at the date and time you specified.

## Using My Favorites to Select a Resource

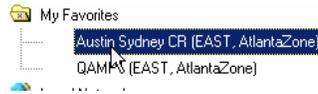
You can make resources that you schedule frequently easily accessible by putting them in the My Favorites folder.

### To add a resource to My Favorites

- ▼ Highlight the desired resource, right-click and choose Add to Favorites.



The item is copied into the Favorites folder, where it is labeled using its nickname.



**Note:** Resources can only be added to the My Favorites folder if they exist in the Local Network. Resources that appear in other networks cannot be added to the My Favorites folder.

### To schedule a resource from My Favorites

- ▼ Highlight the desired resource in the My Favorites folder and click **Add**.

## Requesting Specific Dates and Times

You can request a particular day and time on the Date/Time tab.

### To specify the date and time for a conference

1. On the Resources tab, select the resources you want to include.
2. On the Date/Time tab, enter the date and duration for the conference.
3. To set the time, do one of the following:
  - If you know the time you want, enter it in the **Start at** field.
  - If you have a time range in mind, click **Start time between** and enter the starting and ending times you want to consider. ReadManager LX100 will find the earliest time in that range which works for all selected resources.

Click the Calendar button to view current settings for the resources.

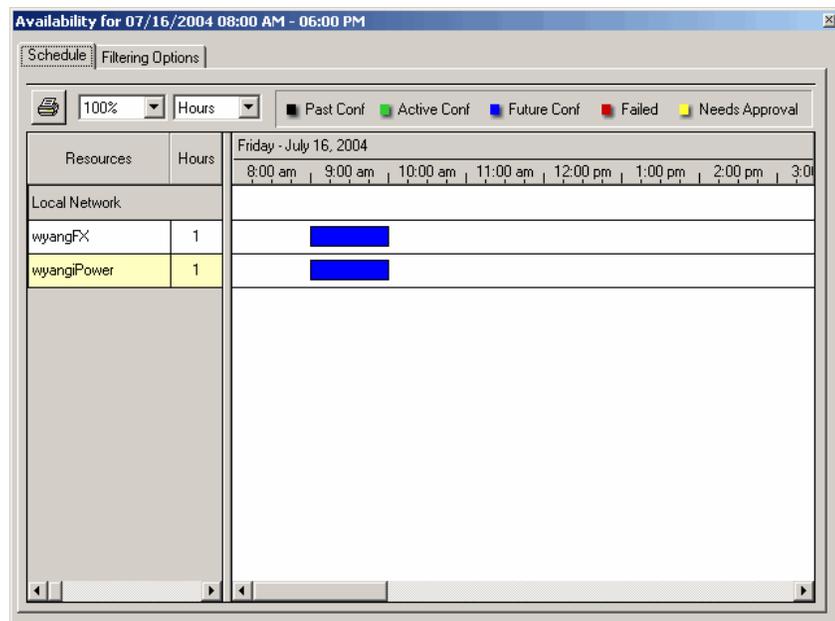
For more about fields on the Date/Time tab, see [Fields on the Date/Time tab](#).

## Fields on the Date/Time tab

- **Only show resources that are available at this date and time.** Check this box if you want to filter for resources available at the date and time you enter on this tab. Then click the Resources tab to have ReadManager LX100 show you available resources. Leave this box unchecked if you have already selected desired resources and want to set the conference date and time.
- **Date.** Select the desired date for the conference. Defaults to today's date.
- **Duration:** The length of time for the conference. Defaults to the duration indicated on the Appointment tab.
- **Start at:** Enter the time for the conference, or click **Now** to set the current time. Defaults to the current time when you enter this tab.

**Note:** If you click the **Now** button to select the current time and then continue to set other conference parameters before pressing Create Conference, the start time for the meeting may become a time in the past. To prevent problems when selecting the current time, click the **Now** button last, just before click **Creating Schedule**.

- **Find earliest start time between:** Select this option to have ReadManager LX100 find a time that works for the resources already selected on the resource tab.
- **View combined resource button** : Click this button to pop-up a view of the day specified in the **Date** field, showing available times for all the selected resources.



When displaying available time, ReadManager LX100 takes into account the time zones for each resource, although the times selected are for your time zone.

### How Much Time is Reserved

In addition to the meeting duration, ReadManager LX100 schedules additional time before and after the meeting, depending on the requirements for the particular resource.

When your Polycom ReadManager LX100 Administrator defines your video network resources, each room is assigned Setup Minutes and Breakdown Minutes that are needed before and after a conference. These are automatically added to the conference duration time when ReadManager LX100 schedules your conference, so that adjacent conferences do not conflict with one another. However, they do not appear in the scheduled conference times; they are handled behind the scenes.

## Creating Recurring Conferences

Conferences scheduled through ReadManager LX100 can be created as recurring conferences. In Microsoft Outlook, the same Recurrence feature used to create other types of recurring meetings is used to schedule recurring conferences.

The maximum number of times a conference can recur is determined by your Polycom ReadManager LX100 administrator. If you exceed the maximum, you will receive a message to that effect, asking you to reduce the number of recurrences.

**Note:** Recurring conferences can only be changed on an individual basis.

### To create a recurring conference

1. While you are in the VideoMeeting window, click the **Recurrence** button.
2. Complete the Appointment Recurrence dialog box, to specify how often the conference should recur, and click **OK**.

**Note:** Polycom ReadManager LX100 does not support creation of annual recurring conferences, but does support Daily, Weekly, and Monthly meetings.

3. Finish creating the conference, as you normally would.

When you click Create Schedule, ReadManager LX100 checks availability and bandwidth as it normally does, and reserves the resources for all recurring meeting times, if there are no conflicts.

## Viewing Details about a Resource

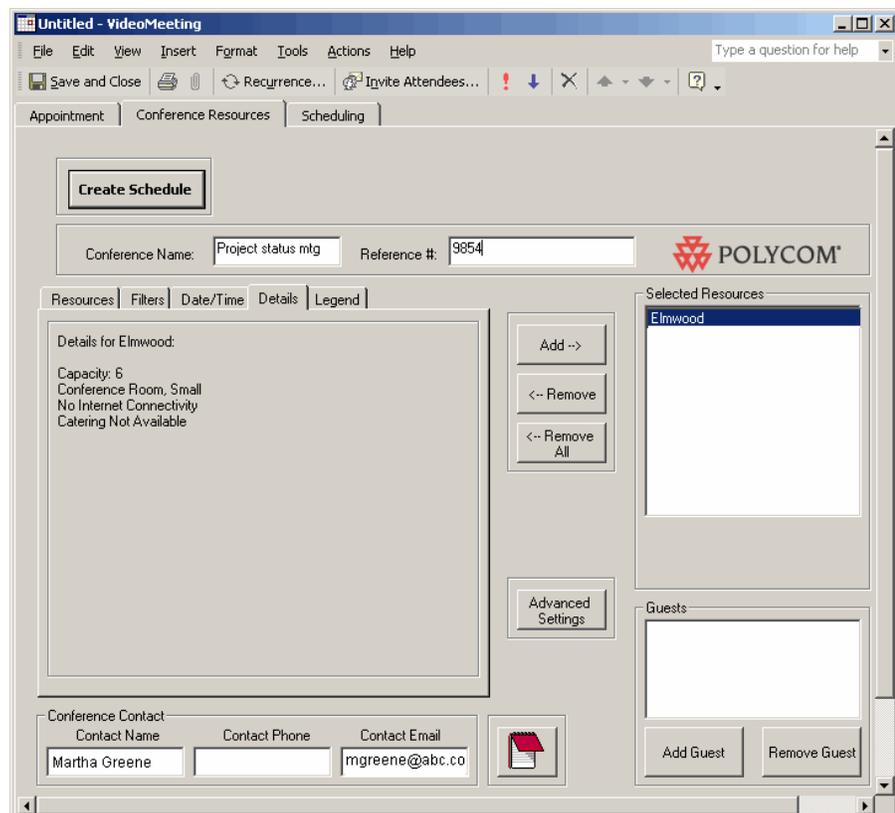
The Details tab shows specific characteristics of a resource after it's been added to the Selected Resources list.

### To see details about a resource that has been added to a conference

- ▼ Select the resource in the Selected Resources list.

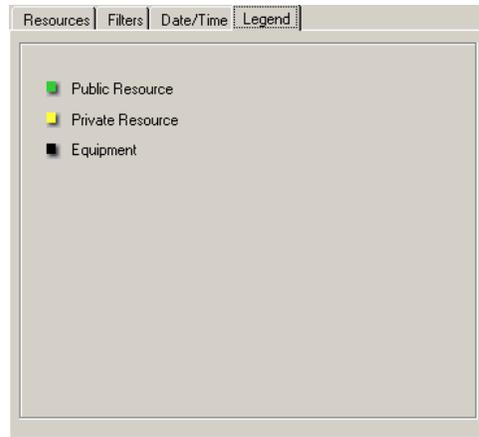
A Details tab appears on the left, and shows the characteristics of the selected resource.

**Note:** This tab does not appear until one of the resources in the Selected Resources list is selected.



## Using the Legend

The Legend tab defines the colors associated with resources.



## Setting the Host for a Multipoint Call

Hosts can be designated when scheduling a multipoint calls. The advantage of designating a host is that attendees will know who the host is of the conference when the email notification for the conference is sent out.

**Note:** Selecting a host site does not control who is dialing, only who is responsible for the call.

### To designate a host

- ▼ Right-click on the desired resource in the Selected Resources box of the Conference Resources window and choose **Select As Host**.



“Host Site” will appear in parentheses next to the designated resource.

## Changing Dial-In Settings for Individual Resources

You can specify whether a particular resource should dial-in to a conference.

**Note:** If Dial-in Only is selected in Advanced Settings, Dial-In will be selected for all resources, and the dial-in setting for individual resources cannot be changed.

If Dial-in Only is not selected and you select dial-in for one or more individual resources, a dial-in number and pass code will be created and sent to you in the reservation confirmation email.

### To select a dial setting

- ▼ Right-click on the desired resource in the Selected Resources or Guest box of the Conference Resources window and choose **Dial-In**.

A check mark indicates whether Dial-In is currently selected.

To allow a different endpoint to dial this resource, make sure this setting is not selected.



## Setting the Connection Type for Individual Resources

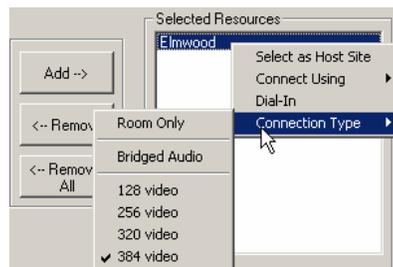
You can set the type of connection to be used by individual conferences. The settings you can select are determined by the type of conference selected in the Advanced Settings. Available choices may include:

- **None.** Use this setting to indicate that only the room is being reserved. When None is the only available selection, “Rooms Only” is selected as the Conference Type.
- **Bridged Audio.** Use this setting to have an MCU create a dial-in number for this endpoint. When None and Bridged Audio are the only available setting, “Bridged Audio Only” is selected as the Conference Type.
- **128, 256, 320, 384, etc. video.** Use these settings to specify a particular connection speed for this endpoint. When these settings are available, “Video/Audio” is selected as the Conference Type.

### To set the connection type for an individual resource

- ▼ Right-click on the desired resource in the Selected Resources box of the Conference Resources window and choose the appropriate setting.

A check mark indicates the current setting.



## Adding a Guest to a Videoconference

Guests are participants who are not within your video network. For example, you might want to schedule a conference with a client or customer who will be attending from their company office, rather than from one of your conference rooms.

**Note:** If you have a regular guest who is off your network and you want to be able to conference that guest in without entering the information manually each time, ask your Polycom ReadManager LX100 administrator to set them up as an Off Net resource. Selecting an off net resource and adding it to a conference automatically places it in the Guests list.

**Note:** Guests do not receive email notification about conference, so if you select Dial In for a Guest, be sure to send that person the necessary information for the dial in, such as date and time, and the conference ID for the MCU.

### To add a guest to a videoconference

1. In the Conference Resources tab, click the **Add Guest** button.
2. In the Conference Guest dialog box, enter the following:
  - **Name.** This name will be used to identify the guest on conference schedule email notifications to recipients.
  - **Number.** The IP or ISDN number ReadManager LX100 will use to reach the guest, if the call is auto-started.
  - **Connect Type.** Whether the connection to the guest is IP or ISDN.
3. Click **OK**.

**Note:** The email address of the guest can be entered (manually or from the contact list) on the To line of the meeting request along with the other internal guests.

## Creating Conference Notes

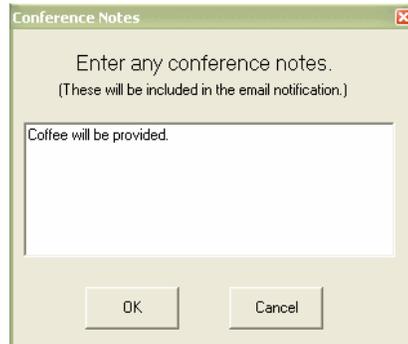
Conference notes allow you to add information regarding the conference. What you type in the box Conference Notes dialog box is sent out in the email notification when the conference is scheduled. The notes are also available when you manage conferences.

### To add conference notes

1. Click the notebook icon on the Conference Resources tab.



2. In the Conference Notes dialog box, enter the notes for the conference.



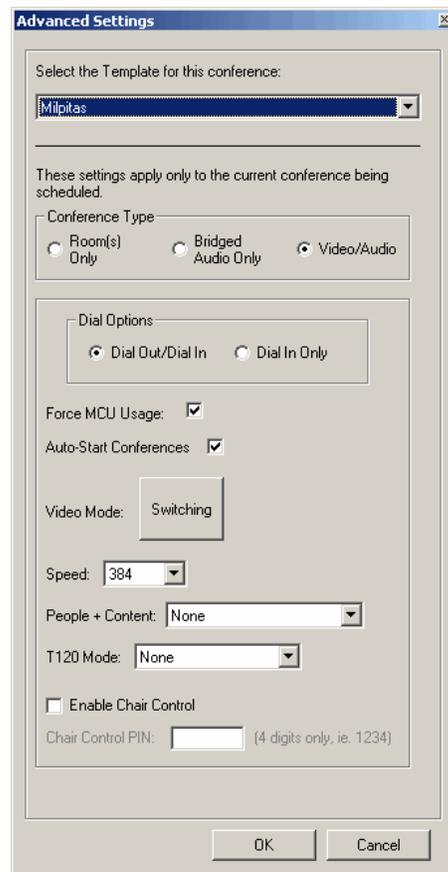
3. Click **OK** when you are finished.

## Using the Advanced Settings

After you click **Load Network**, the Conference Resources tab contains a button labeled **Advanced Settings**. Clicking it opens a dialog box in which you can specify default settings for these important scheduling details:

- [Selecting a Template](#)
- [Type of Conference](#)
- [Dial Options](#)
- [Force MCU Usage](#)
- [Auto-Start Conferences](#)
- [Video Mode](#)
- [Speed](#)
- [People + Content](#)
- [T.120](#)

**Note:** These settings can be changed for a particular videoconference. Be aware, however, that Polycom RamiManager LX100 remembers the last setting used. If you want to change these on a one-time-only basis, you should return to the dialog box after the conference is scheduled and reset them to your desired defaults.



**Note:** The ability to view and change Advanced Settings depends on the permission settings associated with your user name. If you do not see an Advanced Settings button on the Conferences Tab, you do not have access to this feature. For more information, contact your Polycom ReadManager LX100 administrator.

## Selecting a Template

Templates are collections of advanced conference settings. When you are scheduling a conference and open the Advanced Settings dialog box for the first time, your default template is always selected, and the values in the Advanced Settings dialog reflect the settings associated with that template.

You may have only one template available in Advanced Settings, or your network administrator may have created multiple templates to adjust the Advanced Settings in different ways.

If you select a different template from the list, it will adjust the values throughout the Advanced Settings dialog. If desired, you can then make additional adjustments to fine-tune the settings for this conference.

## Specifying the Type of Conference

You can specify the type of conference this will be:

- [Rooms Only](#)
- [Bridged Audio Only](#)
- [Video/Audio](#)

### Rooms Only

Select Rooms Only when you only want to reserve the rooms themselves. Although equipment in them will not be available to other people, no bandwidth will be reserved for the conference. All other Advanced Settings for the conference become irrelevant, and are grayed out in the dialog box. Any conference that uses third-party audio conference systems (outside the control of the enterprise) would use this setting and simply utilize the conference phone in the room to dial into the third-party conference line

### Bridged Audio Only

Select Bridged Audio Only when you want to set up a dial-in conference into which multiple people can dial. The bridge is reserved as an audio-only media, with no video media. Choosing this conference type automatically selects the Dial In Only and Force MCU Usage options. This means that an MCU's resources will be reserved and used to create a dial-in conference. After you create the conference, the conference confirmation email you receive will include the dial-in number and pin code required to access it.

With this type of conference, no bandwidth is reserved except the MCU. The rooms associated with the resources are reserved, so any equipment in those rooms will not be available to other people. This also does not reserve precious video resources on the MCU that would otherwise be reserved for a mixed audio/video call.

**Note:** Only regular POTS audio phones can be used--not ISDN endpoints. Attempting to mimic an audio call using a 64K dial speed through an audio/video endpoint may result in the call being dropped, or in very poor audio quality.

### Video/Audio

Video/Audio allows you to use a combination of video and audio connections in this conference, and to reserve the required bandwidth and equipment associated with resources, as well as the rooms. The conference can use a combination of both Dial-In and Dial-Out, or you can specify that it should be Dial In only, if you want all connections to be made through one bridge.

## Specifying Dial Options

You can determine whether a conference will require all endpoints to dial in to the conference, or whether a combination of dial-in and dial-out will be allowed.

When you want an MCU (also known as a “bridge”) to create a dial-in conference for which a particular phone number and pin code are created for all conference participants, use the Dial-In Only setting. With a dial-in conference, any audio or video system can dial in, and all participants will be connected to the same conference inside the bridge. This allows participants to dial into the bridge at their convenience from anywhere they choose.

When you want to be able to dial-out to a video system, as well as to have participants dial in, use the Dial Out/Dial In setting.

When you specify Dial Out/Dial In, you can specify the individual resources that you want to dial in. For example, you might specify that a particular end-point should use dial-in, in which case a bridge will create a dial-in number for it. For more information, see [Changing Dial-In Settings for Individual Resources](#) on page 17.

**Note:** When selecting the Dial-in only option or Room Only option from the Advanced Settings dialog box, all selected resources are forced to be dial-in only. When you change that selection to Dial-in/Dial-out, the individual selected resources remain set to dial-in. If you want them to be dial-out, you will need to manually change the settings. See [Changing Dial-In Settings for Individual Resources](#) on page 23.

## Forcing MCU Usage

The Force MCU usage is set automatically if you specify Bridged Audio Only. You may also want to use this setting if you want to require all endpoints to dial in to a single number and connect inside the same bridge. When this setting is not selected, the endpoints can connect directly to each other with either point-to-point configurations or using one endpoint’s built-in MP capability.

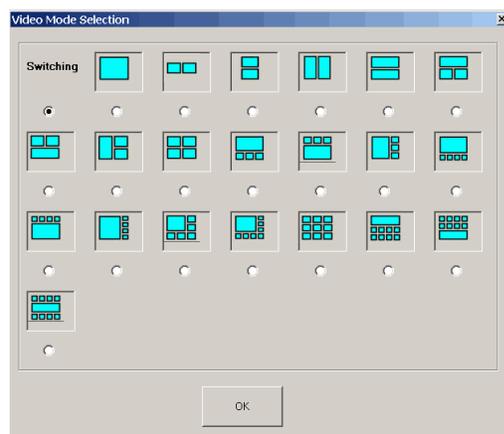
## Setting the Video Mode for Multipoint Calls

The Video Mode setting determines the initial screen layout on an endpoint's monitor during a multipoint conference if it requires a stand-alone bridge.

You can select Switching, so that the display changes each time the speaker changes, and everyone sees the current speaker. Or you can select the number of panels to be shown, so that you can see all of the meeting participants at once.

If you select more windows than there are participants, the extra windows simply display with a background color.

**Note:** When selecting a video mode, it's a good idea to consider the MCU resources that it will require. Normally, Switching mode consumes fewer MCU resources than Continuous Presence mode. The greater number of small video windows that are used, the more video resources required on the MCU.



## Using Auto-Start or Manual Start for a Conference

When Auto-Start is selected in the Advanced Settings dialog box, the call will be dialed automatically at the start time of the videoconference, or a little before, based on any required start minutes.

If you prefer to start conferences manually at the time of the conference, uncheck this setting. However, if you uncheck it, you must be sure to start it manually at the scheduled time. Otherwise, the conference will not launch.

## Setting the Default Connection Speed for a Call

The speed set here will determine the speed at which the endpoints will communicate for both point-to-point and multipoint conferences. If a higher speed is selected than can be supported by an endpoint, the speed for that endpoint will be reduced, but it will remain at the default connection speed for the endpoints that can match it. If the calls are placed via a multipoint-capable codec, the behavior depends on the capabilities of that codec.

In the case of ISDN dialing, if the dial speed is higher than number of channels defined in the H320 service of the endpoint, you will receive a warning about exceeding ISDN resources. If that occurs, simply lower the dial speed to less than or equal to the ISDN capability of the endpoint

Higher speed is important when you want high quality video in a meeting. Because higher speed uses more bandwidth, scheduling a meeting with higher speed may limit the number of conferences that can be reserved at one time.

## Using People + Content

This setting controls the ability for one of the endpoints to send two types of data—video and data—over the same bandwidth, so that both people and content can be displayed. The two video streams are handled differently by the receiving endpoint, and may be shown on separate screens, or through Video Switching mode.

**Note:** The MGC requires that conferences with People + Content use a Speed of at least 192 K. If you set the Speed to 128, the conference will fail.

Select the type of People + Content capability you want the conference to use. If you do not want to display both people and content in this conference, leave this setting as “None.”

A conference can have only one People + Content setting. What you select here determines the setting to be used for all participants in the conference.

Endpoints in the conference that don't support the selected method will connect with either video (if they connect via IP) or audio only (if they connect via ISDN).

The available settings include:

- None
- People+Content
- People and Content VO
- Visual Concert PC
- Visual Concert FX
- H320 Duo Video

### None

Select “None” when dual-streams of data are not required.

### People + Content

This Polycom proprietary technology works with most Polycom endpoints.

## People and Content V0

Polycom proprietary technology that works mainly with PictureTel endpoints. Select this option when working with older endpoints.

## Visual Concert PC

PC-based software available with Polycom ViewStation MP/512/SP/323.

## Visual Concert FX

Hardware solution available with Polycom ViewStation FX/EX and VS4000.

## H320 Duo Video

Dual stream mode available with Tandberg endpoints in which one part of the conference is set as the videoconference and the other as the presentation conference. This selection supports both IP and ISDN.

## Using T.120

Polycom ReadManager LX100 allows you to define T.120 conferences, and to select the speed for the T.120 connection. Select "None" to disable the T.120 mode.

T.120 is a standard that contains a series of protocols and specifications describing application sharing in multi-point data communication. The following options may be available, depending on the participant equipment and software:

- Application sharing, allowing two or more conference participants to work on the same document/application even if only one participant has the application. In application sharing, one participant launches the application and it runs simultaneously on all the other computers.
- File transfer to all conference participants.
- Chat or "Whiteboard" in which participants communicate with each other via writing.

In all of these modes, the participants can view and hear each other.

From the T.120 drop-down box, select the speed for the T.120 connection. The higher rates (larger numbers) enable faster data transfer rates, but reduce the bandwidth available for the video portion of the call. In low bandwidth calls of 128 kbps, use the smallest bandwidth numbers for the T.120 setting. Check with the IT department to determine the best combinations for your conferences.

**Notes:** Selecting this option uses T.120 resources on the bridge. It is best not to select it unless you are sure you want to use it.

T.120 cannot be added to a conference that has already started.

## Chair Control PIN

You can enter a four-digit Chair Control PIN, to be used by the bridge during the conference.

**Note:** Be sure to make note of this PIN in your own records. You will need to communicate the PIN to the conference chair separately. It is not sent out in a conference email

## Updating Your Calendar with Scheduled Videoconferences

Videoconference schedules are stored in the Polycom ReadManager LX100 database. When conferences are created in Outlook, they will be synchronized with the Polycom ReadManager LX 100 database. If you schedule conferences from the Polycom ReadManager LX100 web interface, you can synchronize your Microsoft Outlook Calendar to show videoconference.

In addition, if you are a conference administrator and want to view all scheduled conferences in Microsoft Outlook, you can update your Microsoft Outlook Calendar to show them.

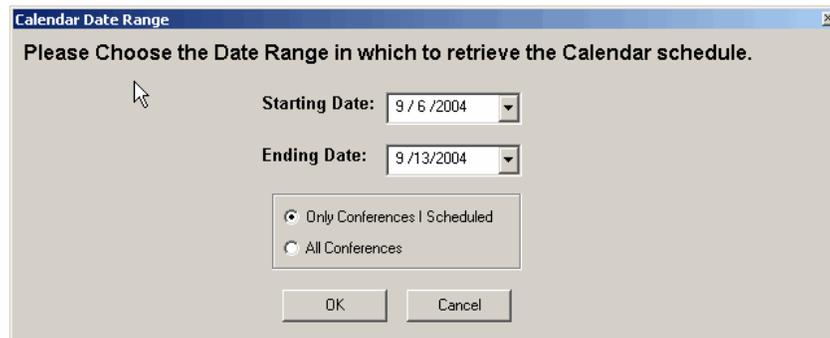
**Tip:** If you want to review all scheduled videoconferences, you may want to create a separate Video Calendar on which to display them, so that they do not clutter up your personal calendar of appointments. For details, see [Setting up a Videoconferencing Calendar](#) on page 42.

### To update your Outlook Calendar

1. Go to your Calendar in Outlook.

If you have more than one Calendar folder set up, select the one on which you want videoconferences to be shown.

2. From the Video menu, choose Update Calendar.
3. In the Calendar Date Range dialog box, select the starting and ending dates to indicate the date range of scheduled videoconferences you want to view on your calendar.



4. Select whether you want to see only conferences you scheduled, or all conferences (if you are a Conference Administrator), and then click **OK**.

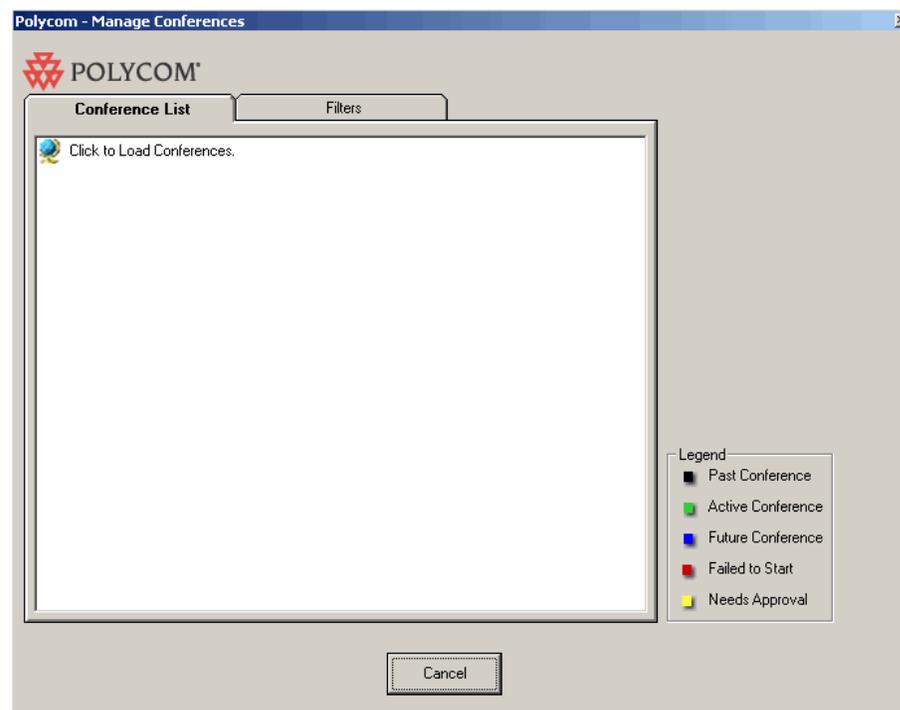
Scheduled videoconferences appear on your Outlook Calendar.

#### To remove a videoconference from your Outlook Calendar

- ▼ Right-click on the conference you want to remove and choose Delete.

## Managing Scheduled Conferences

After a videoconference has been scheduled, you can make changes to it using the Manage Conference feature from the Video menu. When you choose it, the Manage Conferences window opens.



Clicking the Globe loads the conferences into the window. The default filter for conferences is from seven days in the past to 30 days in the future. To see additional conferences, follow the steps described below, under [Locating the Conference You Want to Manage](#).

## Locating the Conference You Want to Manage

Use the Filters tab to help identify the conference you want to work with. Filtering for scheduled conferences works very similarly to filtering resources when scheduling a conference.

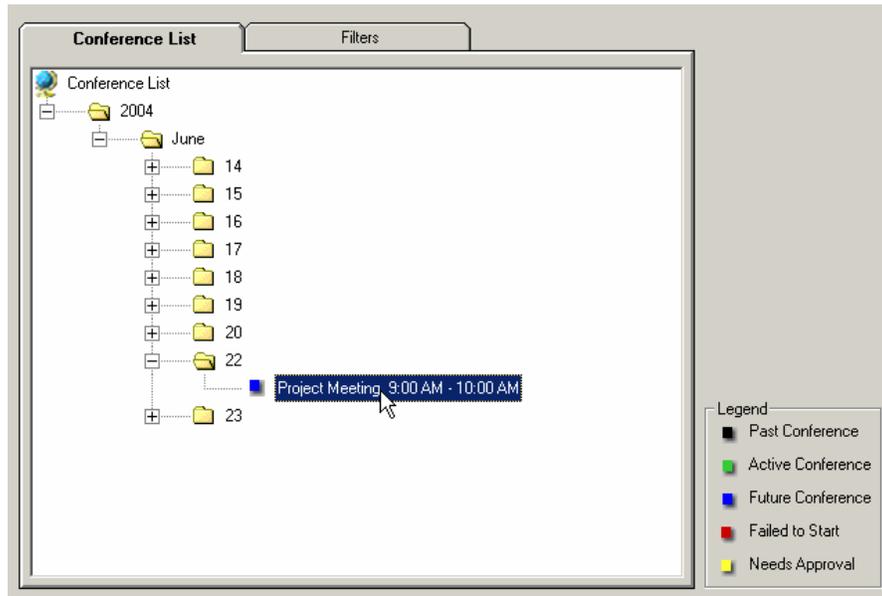
### To locate the conference you want to manage

1. From the Video menu, choose Manage Conference.
2. Click the Filters tab so that you can narrow your search for a particular conference.
3. Enter a date range, conference name, conference ID or reference number for the conference. The initial date range is from seven days prior to today, to 30 days after today. Expand the date range to see other conferences at the same time.

The screenshot shows a web interface with two tabs: "Conference List" and "Filters". The "Filters" tab is active. It contains a "Date/Time Filter" section with a checkbox checked, a "Please Select the time range for the conferences." instruction, and two rows of date/time pickers. The first row shows "Start Date/Time" as "6 /12/2004" and "7:00 AM". The second row shows "End Date/Time" as "6 /19/2004" and "7:00 PM". Below this are three search sections, each with an unchecked checkbox and a text input field: "Conference ID Number Search" (input: "Please Enter the Conference ID to Search For Here"), "Conference Name Search" (input: "Please Enter the Text to Search For Here"), and "Reference Number Search" (input: "Please Enter the Text to Search For Here").

4. Click the Conference List tab. Conferences that match your criteria are available in a hierarchy by date.

- Expand the folders to find the conference with which you want to work.



As the Legend indicates, the icons next to the conference give visual information as to when the conference is scheduled.

**Black:** Conference was in the past.

**Green:** Conference is currently active.

**Blue:** Conference will occur in the future.

**Red:** Conference failed to start.

**Yellow:** Conference needs approval. (See [Approving a Requested Conference](#) on page 32.)

- Right-click on the conference and select the appropriate action from the menu.
  - For conferences that have already taken place, Close is the only available action.
  - For conferences in the future, Conference Details, Edit Conference, and Delete Conference are available.

Approve Conference may also appear, if you are a Conference Administrator.
  - For active conferences, only Manage Conference is available.

## Approving a Requested Conference

When users with the user profile “Request Only” schedule conferences, the conferences are reserved but will not launch. They must be approved by a Conference Administrator before they can occur. The Conference Administrator receives an email when a conference needs to be approved.

To approve a requested conference

1. Locate the conference that needs approval. (For details, see [Locating the Conference You Want to Manage](#) on page 30.)
2. Right-click on the conference icon and choose Approve Conference.

An email is sent to the person who requested the conference.

## Deleting a Conference

Conferences can be deleted from the Manage Conferences window.

### To delete a conference

1. Locate the conference you want to delete. (For details, see [Locating the Conference You Want to Manage](#) on page 30.)
2. In the Conference List tab of the Manage Conferences window, right-click on the conference you want to delete and choose Delete Conference.
3. When asked to confirm, click **Yes**.

If the conference was part of a series of repeated conferences, a message asks whether you want to delete only this message, or the whole series.

The conference is deleted. Email messages are sent to the facilitators for the resources involved.

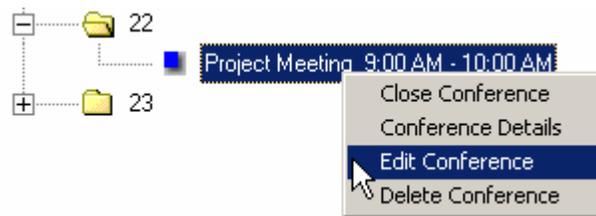
## Making Changes to a Future Conference

All of the features available when you first schedule a conference can be used to make changes to a conference before it starts.

**Note:** If you make a change to a conference that was part of a series of repeated conferences, the change is made only to the selected conference, and not to the series.

### To make changes to a future conference

1. Locate the conference you want to change. (For details, see [Locating the Conference You Want to Manage](#) page 30.)
2. In the Conference List tab of the Manage Conferences window, right-click on the conference you want to change and choose Edit Conference.



The Edit Conference window opens. This window is very similar to the Conference Resources tab you use to schedule a conference.

3. Make desired changes to the resources, conference time, contact information, and guests.
4. When finished making changes, click **Update Conference**.

For details about working in this window, see the information presented earlier in the section [Scheduling a Videoconference](#) on page 4.

**Note:** To NOT save the changes to the conference, click the close box in the upper corner of the window without clicking Create Conference.

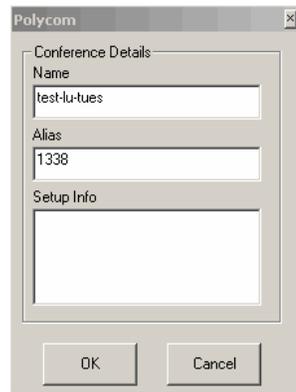
## Entering Additional Conference Details

Sometimes conferences have additional details that need to be tracked. For example, when the request/approve conference feature is used, the administrator needs to be able to enter comments as to why a conference is approved or not. Or there may be special requirements related to setting up a conference. To accommodate this, details about the conference can be added after the conference is scheduled.

### To enter additional conference details

1. Locate the conference for which you want to add details. (For details, see [Locating the Conference You Want to Manage](#) on page 30.)
2. In the Conference List tab of the Manage Conferences window, right-click on the conference and choose Conference Details.

The Conference Details dialog box appears.



3. Enter the information you want to track for the conference and click **OK**.

The Alias field can be used to assign a conference ID.

The Setup field is for any comments about the conference.

## Managing an Active Conference

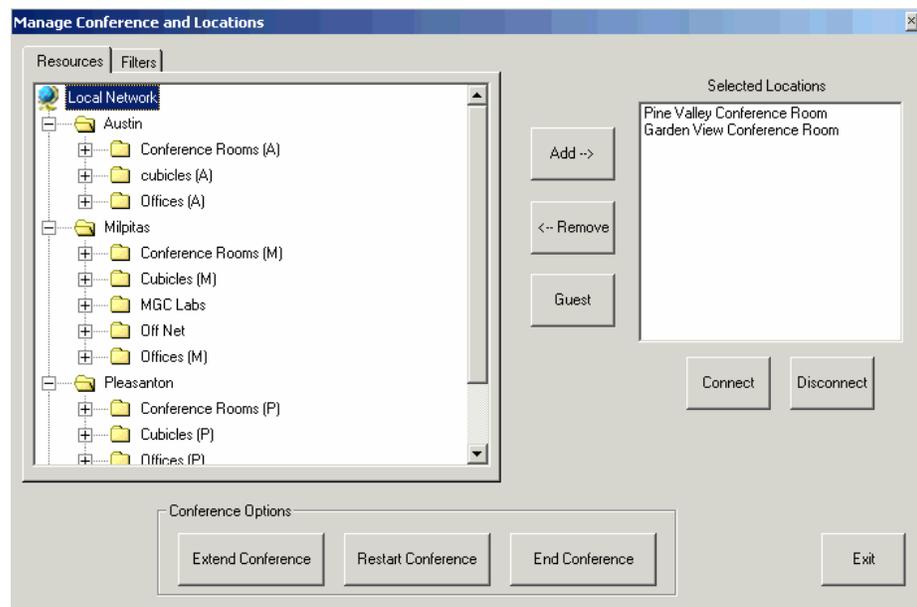
A conference that has started is considered an active conference. There are a number of adjustments you can make while a conference is active. You can:

- Add and remove resources
- Add a guest
- Temporarily disconnect a resource
- Reconnect a resource that was previously disconnected
- Extend a conference
- Restart a conference
- End a conference

### To make changes to an active conference

1. Locate the conference you want to change. (For details, see [Locating the Conference You Want to Manage](#) on page 30.)
2. Select the conference, right click and choose Manage Conference.

The Manage Conference and Resources window opens.



You see the resources that are in the conference in the Selected Resources list.

**Note:** Changes that effect resources and guests (adding, removing, disconnecting, and reconnecting) can only be made up until 5 minutes or less is left in the conference. After that you will only have the option of extending or ending the conference.

### To add a resource

- ▼ Select the resource and click **Add**.

ReadiManager LX100 checks for the resources' availability. If the resource is able to join the conference they are called and the resource is reserved for this conference time.

### To remove a resource

1. Select the resource from the Selected Resources list and click **Remove**.
2. When the confirmation message asks you to confirm that you want to remove the resource, click **Yes**.

The resource is taken out of the conference and freed up for other possible conferences.

### To add a guest

A guest can only be added if there is multipoint capability in either a video codec or MCU in the conference. If there is no multipoint capability in the conference, a guest cannot be added.

1. Click the **Guest** button.
2. In the Conference Guest dialog box, enter the name and number, choose the type of connection, and click **OK**.

ReadiManager LX100 attempts to connect the guest to the conference. When the guest has been added, their name appears in the Selected Resources list.

You can add multiple guests, but only **one** at a time.

### To disconnect a resource

1. Select the resource you want to temporarily disconnect in the Selected Resources list.
2. Click the **Disconnect** button.
3. When the confirmation message asks you to confirm that you want to disconnect the resource, click **Yes**.

**Note:** Disconnected resources are still associated with the conference and are not available for other conferences. The most common use of Disconnect is when you want to disconnect a resource for short time, but still want it to be available later in the conference. If you want to disconnect a resource and have no more need for it, use the **Remove** button instead.

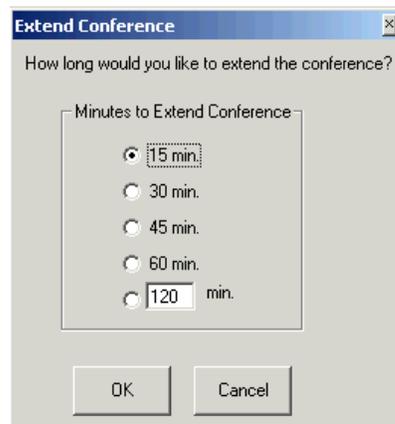
### To re-connect a disconnected resource

1. Select the resource you want to reconnect in the Selected Resources list.
2. Click the **Connect** button.

**To extend a conference**

This feature affects all the resources in your conference. If you indicate you want to extend the conference by 45 minutes, ReadManager LX100 checks to see if all the resources are free for that time. (All resources must be available for the extended time. If one resource is not available then you can not extend the conference.) If you receive a message that the conference cannot be extended, try extending it for a shorter period of time

1. Click the **Extend Conference** button.
2. In the Extended Conference dialog box, select the number of minutes by which you want to extend the conference and click OK.



**To restart the conference**

1. Click the **Restart Conference** button.
2. When the confirmation message asks you to confirm that you want to restart the conference, click **Yes**.

This restarts your entire conference. All resources will be disconnected and then reconnected.

**To end a conference**

Use this feature to end a conference that did not go as long as scheduled. That way, resources used in the conference are freed up to be used for other conferences.

1. Click the **End Conference** button.
2. When the confirmation message asks you to confirm that you want to end the conference, click **Yes**.

## Closing a Completed Conference

Conferences that have already occurred can be closed. When you close a conference, you indicate whether it completed successfully or not, and can add comments about it. Reports can include comments; so entering comments gives you a way to track information about completed conferences.

Closing conferences is optional.

### To close a completed conference

1. Locate the conference you want to close. (For details, see [Locating the Conference You Want to Manage](#) on page 30.)
2. In the Conference List tab of the Manage Conferences window, right-click on the conference you want to close and choose Close Conference.



3. In the Close Conference dialog box, indicate whether the conference completed successfully, enter any comments, and click **OK**.

The conference is removed from the Conference List.

## Setting Up Microsoft Outlook for Use with Polycom Video Conferencing

Polycom RendiManager LX100 can be integrated right into Microsoft Outlook, so that you can schedule and manage conferences along with other meetings.

### Requirements

You must be using Microsoft Outlook version 2000 SR-1 or later, or XP. If you have Outlook version 2000, you can download the Service Release (SR) from the Microsoft website.

### Installing the Polycom Video Conferencing Outlook Component

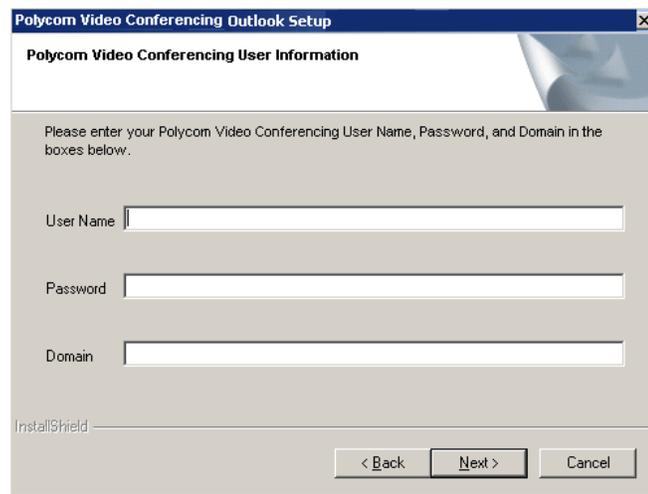
The Polycom Video Conferencing component used with Microsoft Outlook is available from your Polycom RendiManager LX100 application web page.

#### To download the Polycom Video Conferencing Outlook component

1. Log on to the Polycom RendiManager LX100 application as you normally would through a web browser.
2. From the menu bar, choose Support > Downloads.
3. Click the link to the program `pcsoutlook.exe`.
4. Save the program to your computer.

#### To install the Polycom Video Conferencing Outlook component

1. Make sure Microsoft Outlook is closed.
2. Locate the file `pcsoutlook.exe` you just saved on your computer and double-click it to start the installation process.
3. Follow the prompts on the screen from the install wizard to complete the installation.



**Polycom Video Conferencing Outlook Setup**

**Polycom Video Conferencing User Information**

Please enter your Polycom Video Conferencing User Name, Password, and Domain in the boxes below.

User Name:

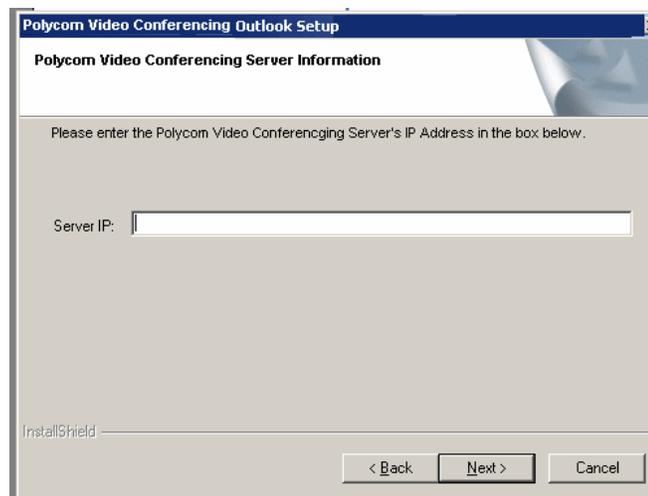
Password:

Domain:

InstallShield

< Back   Next >   Cancel

You are asked for the information in the screenshots above and below so that Polycom ReadManager LX100 can enter it into the appropriate location inside Outlook. Your Polycom ReadManager LX100 Administrator may need to provide you with the applicable information.



**Polycom Video Conferencing Outlook Setup**

**Polycom Video Conferencing Server Information**

Please enter the Polycom Video Conferencing Server's IP Address in the box below.

Server IP:

InstallShield

< Back   Next >   Cancel

After installation is complete, start Microsoft Outlook; you will see a new menu, named Video in Outlook.

The user settings you entered during installation now appear on the Logon Settings screen. If you want to review them, choose Logon settings from the Video menu.

## Logging On from Microsoft Outlook

You enter logon settings during installation which are saved in Outlook, so you do not normally need to log on to Polycom ReadManager LX100.

If your logon settings change at any time, you can reenter your logon information.

**Note:** If your network uses LDAP, you may need to log on to Polycom ReadManager LX100 on the web before you can do so from Outlook. For assistance, contact your Polycom ReadManager LX100 Administrator.

### To enter logon information

1. Start Microsoft Outlook.
2. From the Video menu, choose Logon Settings.

The Logon Settings dialog box appears, displaying the login information you entered during installation.



3. To make changes to your logon information:
  - Use your Polycom ReadManager LX100 user name and password in the User Name and Password fields.  
  
This is the same logon information you use to access the Polycom ReadManager LX100 web application.  
  
The password is case-sensitive, but your user name is not.
  - The Server IP is the same as the one you use to access the Polycom ReadManager LX100 web application.
  - For DSN, enter PCS.
  - The Port field is automatically completed. Leave the setting as it appears unless told to change it by your Polycom ReadManager LX100 Administrator.
4. Click **Save** to save the changes.
5. When message tells you that the changes have been saved, click **Exit**.

## Setting up a Videoconferencing Calendar

If desired, videoconferences can be displayed on a separate calendar. While for most users, adding videoconferences to your regular calendar is adequate, it can be useful for conference administrators who want to see all scheduled videoconferences to keep a separate calendar. That way videoconferences do not clutter the administrator's personal calendar.

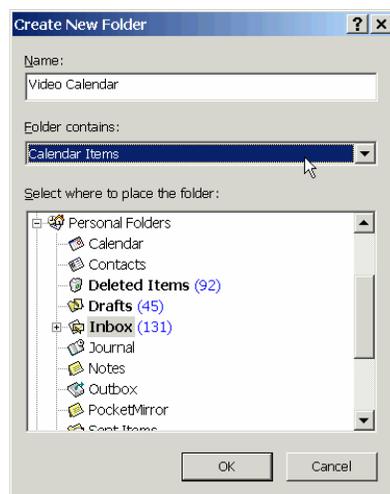
**Note:** If you schedule videoconferences from a second Calendar, when you click the Send button to send conference invitations to participants, you will see a message from Microsoft Outlook that it will not be able to tally the responses for you. This is because responses to meeting requests can only be tallied on the main Outlook Calendar.

### To add videoconferencing to your standard calendar

1. From the Folder window, right-click the Calendar and select Properties at the bottom.
2. On the General tab, highlight the drop down box at "When posting to this folder, use:" and highlight "VideoMeeting".

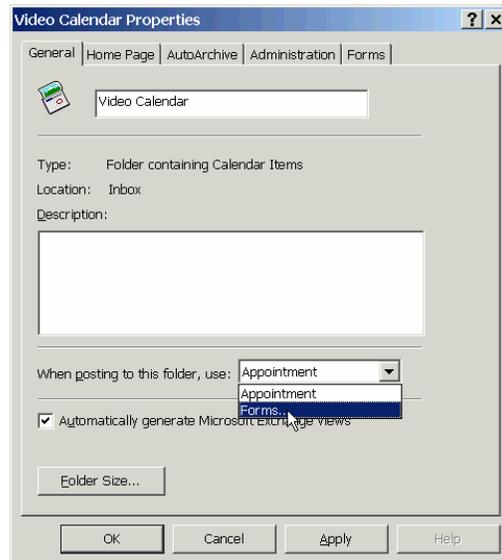
### To create a separate videoconferencing calendar

1. Create a new Outlook Folder (from the File menu, choose New > Folder).
2. In the Create New Folder dialog, change the selection in the Folder Contains field to Calendar Items.
3. In the Name field, enter Video Calendar (or whatever name you want).

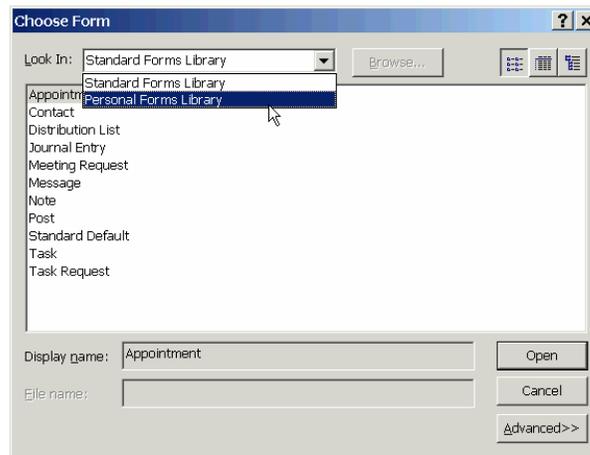


4. Click **OK**.
5. In the Outlook bar, right-click on the new Video Calendar icon and select Properties.

6. In the General Tab, in the field “When posting to this folder, use”, select Forms.



7. In the Choose Form dialog box, select Personal Forms Library from the Look In field.



8. Select VideoMeeting in the list and click **Open**.  
VideoMeeting now appears in the field “When posting to this folder use.”
9. Click **OK** to close the Video Calendar Properties dialog box.

## Uninstalling the Outlook Component of Polycom ReadManager LX100

Uninstalling the Outlook Plug-in from your computer requires two main steps:

- Uninstalling Polycom ReadManager LX100 Outlook client
- Removing the VideoMeeting form

### To uninstall the Polycom ReadManager LX100 Outlook client

1. Open the Add or Remove Programs control panel
2. Select and remove the Polycom Video Conferencing Outlook program.

**Note:** You can also uninstall the Polycom Video Conferencing Outlook client by running the install program, `pcsoutlook.exe`.

### To remove the VideoMeeting form

Leaving the VideoMeeting form on your system should not cause any problems, however if you want to remove it, you can do so.

1. In Microsoft Outlook, right-click on the Calendar icon and choose Properties.
2. Click the Forms tab.
3. Select the VideoMeeting form and click **Manage**.
4. In the Forms Manager dialog box, select the VideoMeeting form on the right and click **Delete**.
5. When prompted to confirm the deletion, click **Yes**.

## Checking the Version of the Polycom Polycom Video Conferencing Client Application

If you encounter difficulties scheduling videoconferences through Outlook, you may need to check the version number of the Polycom Video Conferencing Client Application (the VideoMeeting form).

### To check the version of the VideoMeeting form

1. Right-click on the Calendar icon and choose Properties.
2. Click the Forms tab.
3. Select the VideoMeeting form and click **Manage**.

The version number appears in the lower part of the Forms Manager dialog box.

If you do not see the form, contact your Polycom ReadManager LX100 Administrator for assistance.

## Trouble Shooting

If a run-time error occurs while using features from Polycom ReadManager LX100, you must exit and restart Outlook. Upon restarting, you may receive the following error:

*Outlook experienced a serious error the last time the add-in 'pcsoutlook' was opened. Would you like to disable this add in? To reactivate the add-in, click About Microsoft Office Outlook on the Help menu, and then click Disabled Items.*

Polycom ReadManager LX100 can only be used when the add-in is enabled. If you disable 'pcsoutlook' in response to this message, you will need to re-enable it as described in the message before you can schedule additional conferences.

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