Polycom ReadiManager LX 100 Web Scheduling Guide

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Scheduling a Video Conference: Basic Steps

Scheduling a video conference with Polycom ReadiManager LX100 takes just a few quick steps.

Use the instructions below to get started. When you are ready for a more in-depth look at all the features, turn to *Scheduling Features in the Wizard* on page 5.

1. Log in to your Polycom ReadiManager LX100 web site.

    Your Polycom ReadiManager LX100 administrator can give you the URL, your user name, and your password.
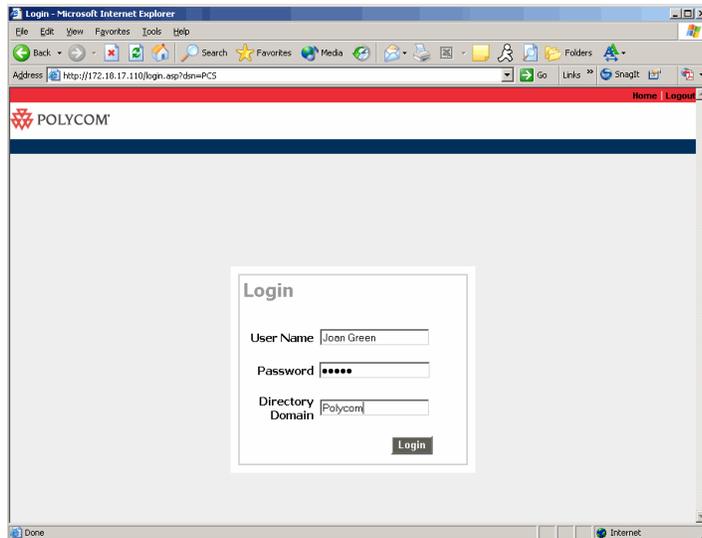
2. On the scheduling wizard home page, click the **Begin** button to start scheduling a conference.

    The conferences you create are listed on this page.
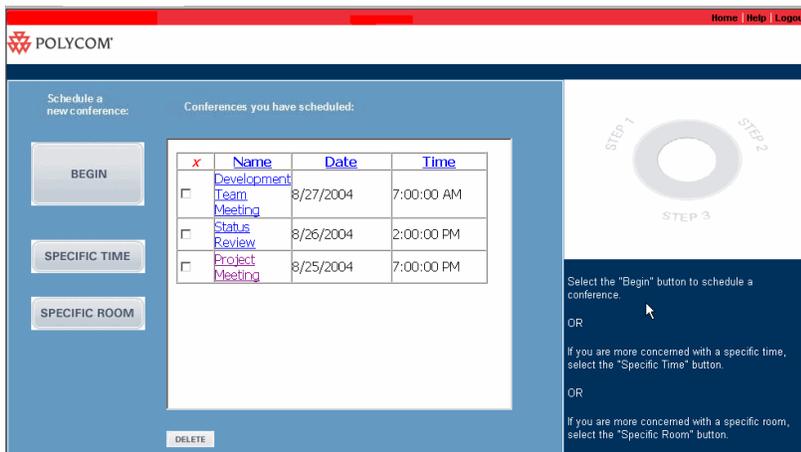
3. **Select the date and time** for the videoconference, then click the right arrow button.

    You can click in a field to type the date and time, or click an arrow and select from a pop-up calendar or time list.

    Tip: You can set up recurring conferences. For details, see page 13.
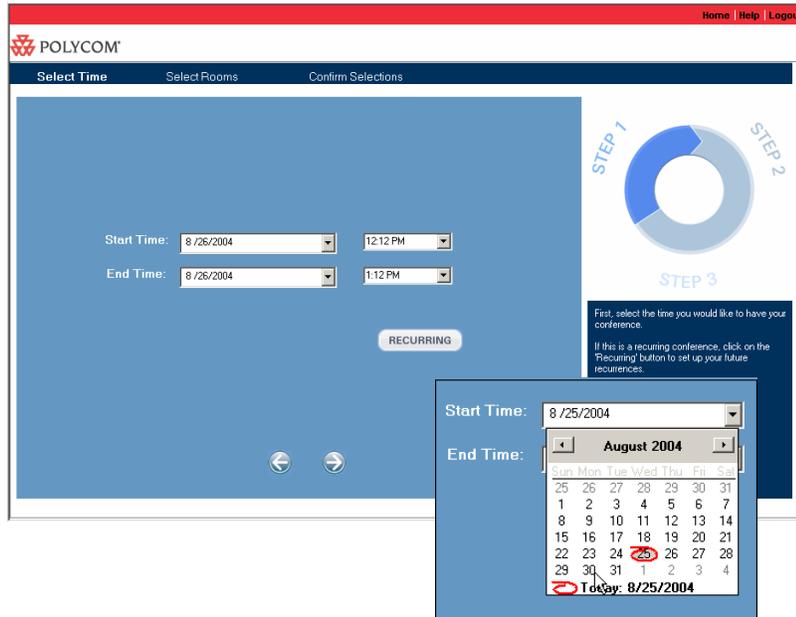
4. **Select the rooms** to use in the conference.

    •   Expand the area folders to see available rooms.

    •   To include a room, highlight it and click **Add**.

    The rooms appear in the list on the right.

    When you are finished, click the right arrow button.

    Tip: If your network includes so many rooms that it's hard to find the right one, you can use filtering to narrow down the list. For details, see page 8.
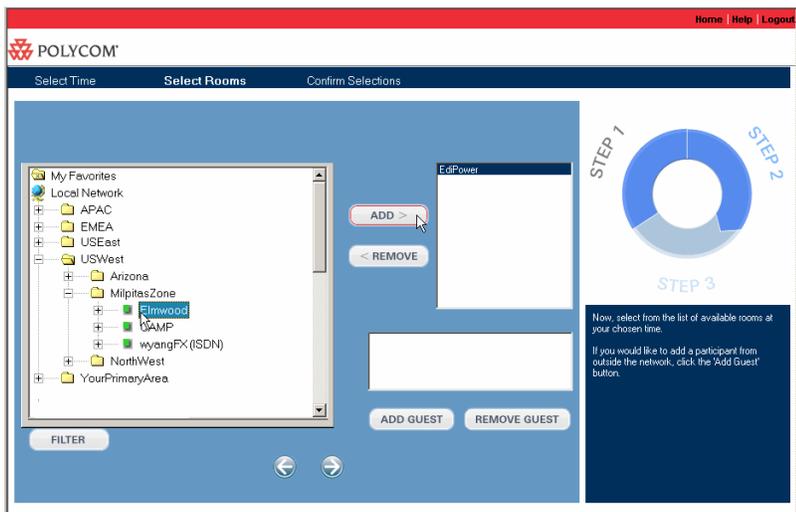
5. Enter a name for the conference, review the information, and click **Finish**

Optional:

- Add any relevant notes.

- Specify attendees, to send them an email.
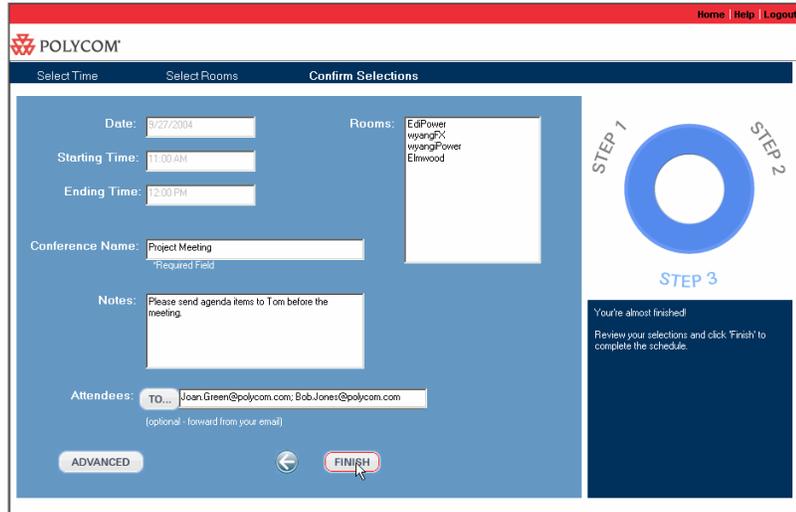
6. When Polycom ReadiManager LX100 tells you the conference has been scheduled, click **OK**.
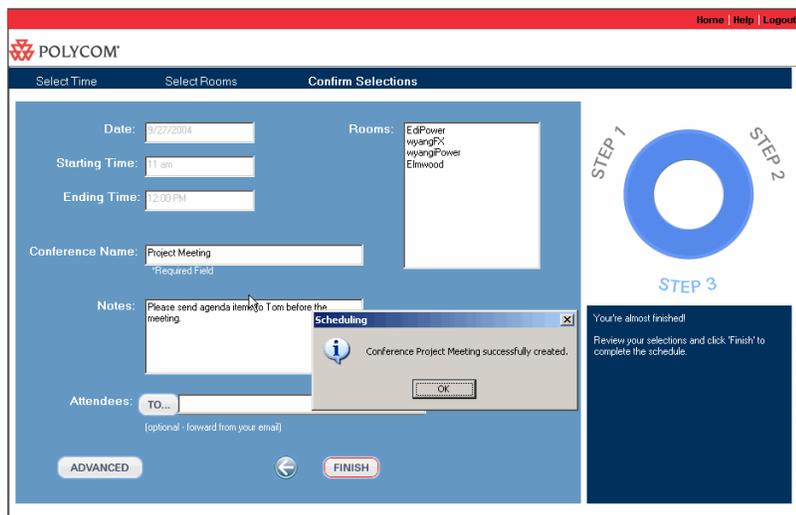
A series of messages appear, as Polycom ReadiManager LX100 reserves resources, schedules participants, and sends emails related to this conference.
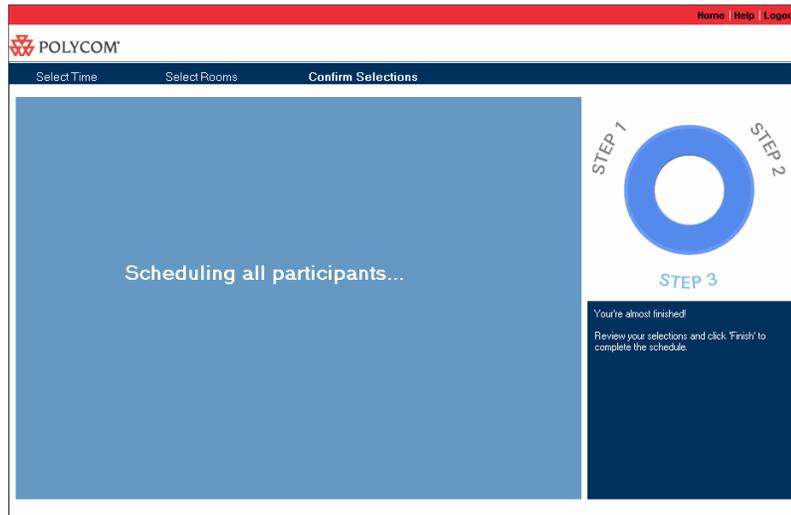
That's it! Your video conference is scheduled.

7. When the confirmation page reappears, click **Home** to return to the first page, where you can continue scheduling and managing videoconferences.

Click **Exit** to close the Polycom ReadiManager LX100 wizard.
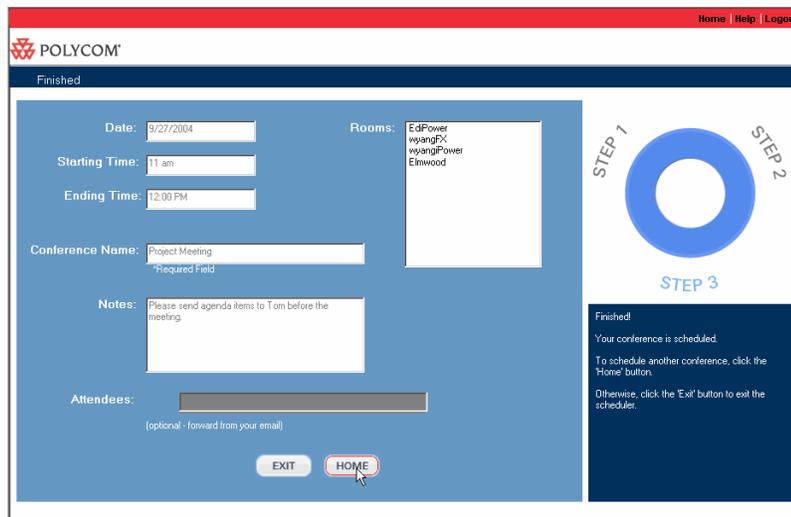
To learn other ways to schedule and manage videoconferences, turn to *Scheduling Features in the Wizard* on page 5.

Scheduling Features in the Wizard

The Polycom ReadiManager LX100 scheduling wizard includes a number of features that help make video conferencing more efficient and customized for your needs. These are described in the remainder of this section:

By adjusting the advanced settings, you can change the type of conference, call speed, conference auto-start or not, video layout mode for multipoint calls, and other advanced features.

Note: The particular features available in to you depend in part on the user permissions assigned to you by your Polycom ReadiManager LX100 administrator. Some features may not be available to all users.

Scheduling Based on Room-Availability

If your conference needs to occur in particular rooms, you can start the scheduling process by clicking **Specific Room** on the scheduling wizard home page.

When you begin scheduling in this way, Polycom ReadiManager LX100 displays the times that the rooms you selected are already scheduled, so that you can plan more efficiently.

To schedule based on specific rooms

1. On the scheduling wizard home page, click **Specific Room**.
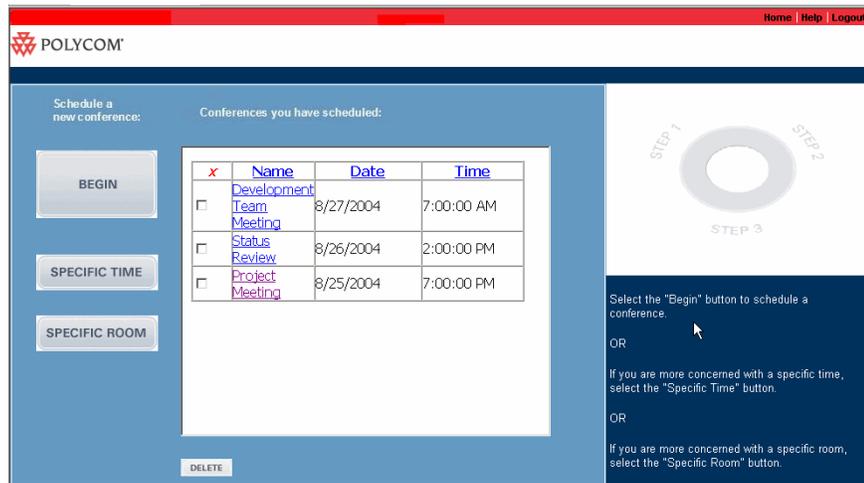
2. On the Select Rooms screen, **select the rooms** to use in the conference and then click the right arrow button.

   • Expand the area folders to see available rooms.

   • To include a room, highlight it and click **Add**.

   (Optional): Use the **Filter** button to help locate the rooms you want.

Scheduling Features in the Wizard

The rooms appear in the list on the right.
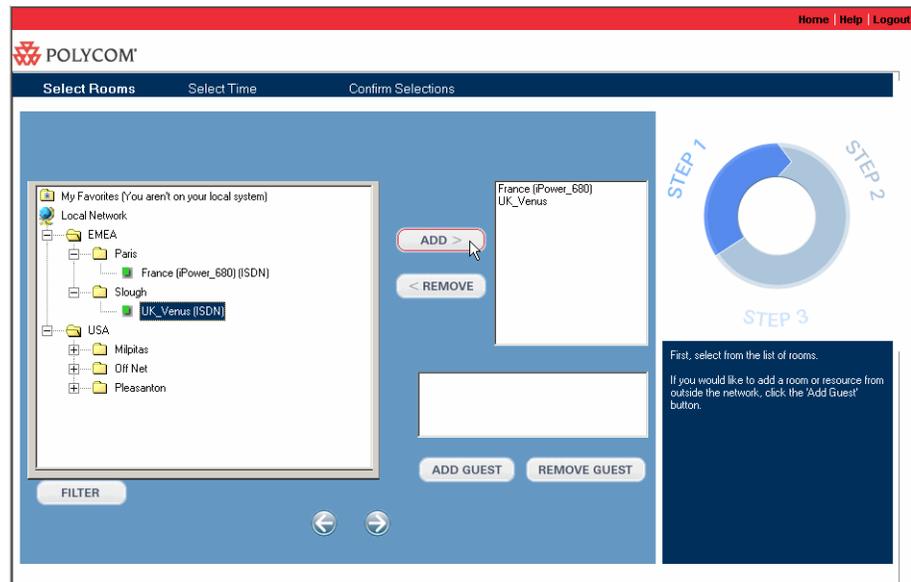
On the Select Time screen, you see the rooms you selected, and a display that shows when they are free, and when they are busy. Time zones for each room are taken into account, although the times shown are for your time zone.
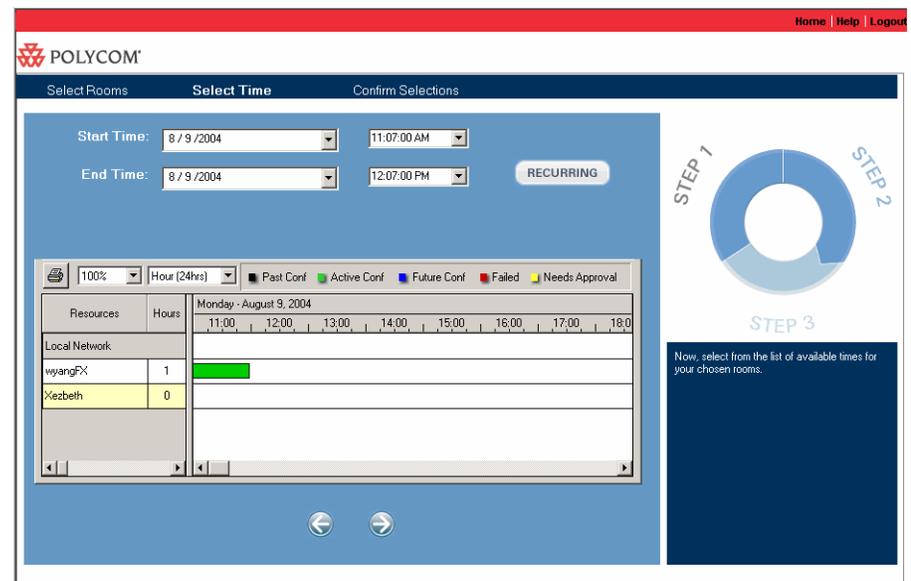
3. Select the time for the conference and click the right arrow.

4. On the Confirm Selections screen complete the conference request as you normally would: enter a title for the conference, any notes, and click **Finish**.

How Much Time is Reserved

In addition to the meeting duration, additional time is scheduled before and after the meeting, depending on the requirements for the particular room.

When your Polycom ReadiManager 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 the conference is scheduled, 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.

Finding a Room that Fits Your Needs (Filtering)

A video network can include a large number of rooms and resources. To locate the room that has the equipment and features you need for your videoconference, you can use the Filter option in the scheduling wizard.

To find (filter for) rooms with particular equipment and features

1.   In the scheduling wizard, on the Select Rooms page, click the **Filter** button.

Click the
Filter button.
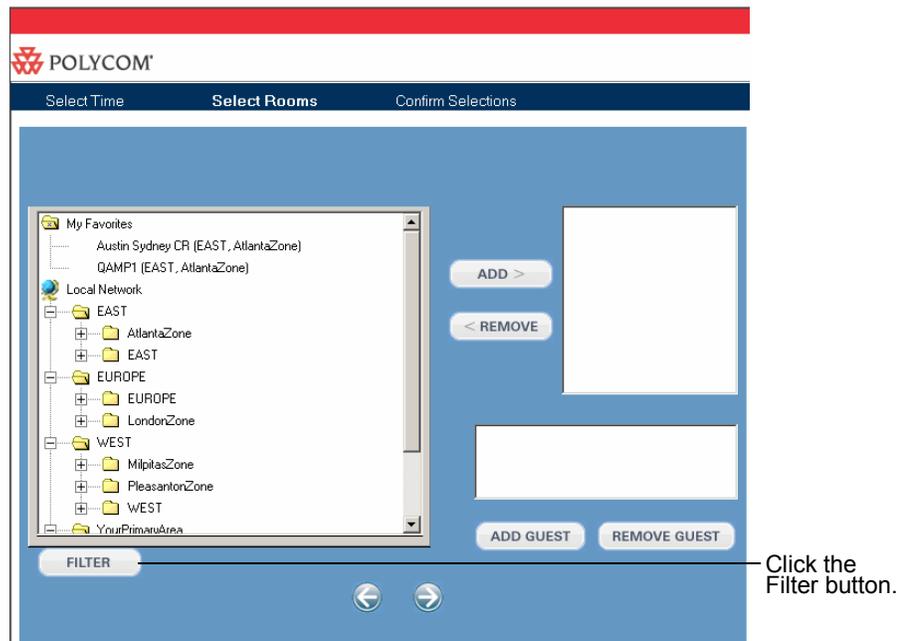
2. In the Filter box that appears, select the criteria that you want to match.

The filter will find the rooms 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 value 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.

3. When you have finished entering criteria, click the **Apply Filter** button.

Rooms and equipment that match your criteria are displayed in the Resources hierarchy. You can then select appropriate rooms and add them to the conference.

<table>
<tr><td>Tip</td></tr>
</table>

Tips: You can toggle back and forth between the Filters and Resources list. 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 ReadiManager LX100 Administrator.

Using My Favorites to Select a Room

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

Rooms from My Favorites can be scheduled in the same manner as the other rooms that appear in the Resources tab.

To add a room to My Favorites

>> Highlight the desired room, right-click and choose Add to Favorites.
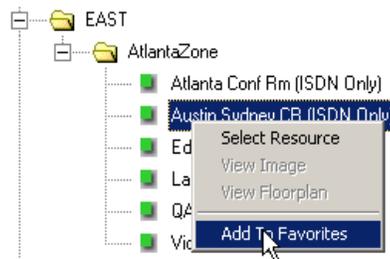
The item is copied into the Favorites folder, where it is labeled using its nickname.

To schedule a room from My Favorites

>> Highlight the desired room in the My Favorites folder and click **Add**.

Sending Email Notifications About the Conference

When you schedule a conference, you can send email notifications to the people involved by entering their email addresses in the Attendees To field, or by selecting names of Polycom ReadiManager LX100 users or other contacts.

Users who have ICAL-enabled on their mail client can receive and respond to invitations to these conferences. For more information, contact your Polycom Conference Suite Administrator.

Before you can use existing contact lists for the first time, you must configure Polycom ReadiManager LX100 to recognize them. For more information, see *Configuring Contact Lists* on page 12.

Note: You don't have to include user emails in the Wizard form. As the creator of the conference, you automatically receive an email about it. You can then forward this message from your email application to those people you want to notify about the conference.

To specify people to whom you want to send email notifications

1. In the To field, type email addresses. If you enter more than one, separate them with semi-colons.

Attendees:	TO...	lurban@polycom.com; joan.green@polycom.com

2. If you want to select people from a contact list, click the **To** button to open the Select Recipients dialog box.

3. Expand one of the folders to see available contacts.
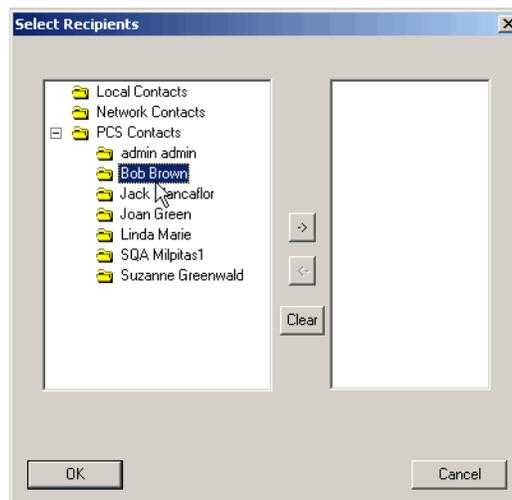
4. Select each contact and click the right arrow button [→] to add it to the list.

5. When you are finished adding contacts, click **OK**.

    The addresses of the users you selected appear in the To field.

Configuring Contact Lists

Before you can use contact lists for the first time through the scheduling wizard in Polycom ReadiManager LX100, you must configure Polycom ReadiManager LX100 to recognize them. You can enable

❑ **Polycom ReadiManager LX100 Contacts.** This will list the users entered in the Polycom ReadiManager LX100 user database.

❑ **Remote Contacts (LDAP)**. This will provide access to any corporate database of users. This is where users can connect to their corporate user list database.

❑ **Local Contacts (MAPI).** This is used to connect to the local contacts used on a client system. Lotus Notes (and Outlook) use this interface and it provides access to Lotus Notes for Polycom ReadiManager LX100 users.

After you have enabled these contact lists, you will be able to open the folders and view lists of available contacts.

To configure contact lists

1. Click the **To** button on the Confirm Selections page of the scheduling wizard.

2. In the Select Recipients dialog box, right-click on one of the folders and choose Configure Contact List.
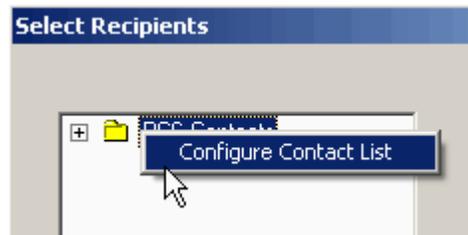
3. In the Configure Contact List dialog box, do the following:
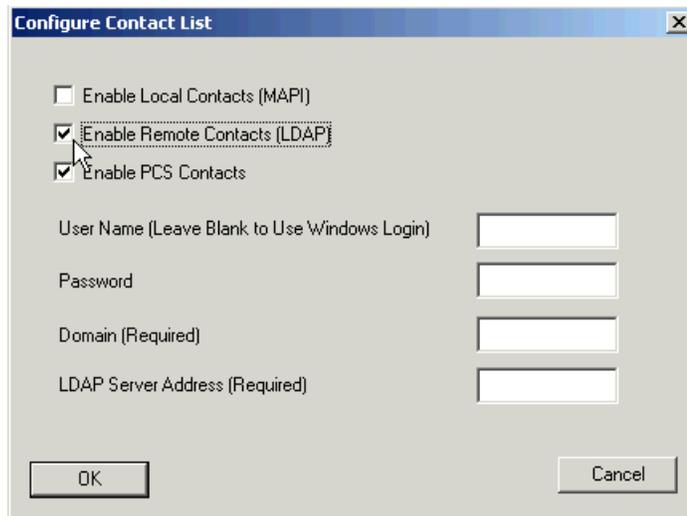
- Check the Enable Remote Contacts (LDAP) option.

- Enter your user name for the LDAP server.

  Note: The user name, password, and domain you enter must have LDAP access permissions. If you are not sure whether you have LDAP access permissions, contact your network administrator.

- Enter your password.

- Enter your internet domain.

- Enter the LDAP server name or IP address.

- Click **OK**.

Creating Recurring Conferences

You can create recurring conferences through the scheduling wizard.

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

To create a recurring conference

1. While you are on the Select a Time page of the scheduling wizard, click the **Recurring** button.

2. In the Appointment Recurrence dialog box, complete the fields to specify how often the conference should recur, and click **OK**.

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

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

   When you click **Finish** to create the conference, Network Aware Scheduler checks availability and bandwidth as it normally does, and reserves the resources for all recurring meeting times, if there are no conflicts.

Note: After creating a series of conferences, the individual conferences are handled separately. If you want to make a change to an individual conference, you can edit each one through Manage Conferences. If you want to delete a recurring conference, you will be given the option to delete one occurrence or the entire series.

Setting the Host Site for a Multipoint Call

Host sites can be designated when scheduling a multipoint calls. The advantage of designating a host site 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 site

>> Highlight the desired resource in the list of selected resources on the Select Rooms screen, right-click to see the short-cut menu, and choose **Select As Host Site.**

"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

>> Highlight the desired resource in the list of selected resources on the Select Rooms screen, right-click to see the short-cut menu, 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.

Changing How the Connection is Made

Some resources can be connected to in more than one way. Connection methods include Dial-In, ISDN, IP, and a Direct connection to an MCU.

The methods available for a given endpoint appear in the Connect Using menu. You can change the method to be used when scheduling.

To select a different connection method

>> Highlight the desired resource in the list of selected resources on the Select Rooms screen, right-click to see the short-cut menu, and choose **Connect Using**.

A check mark shows the current method.

To use a different connection method, select it from the list.
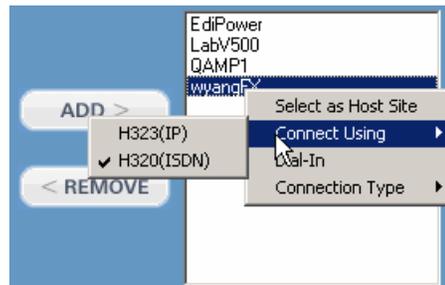
Setting the Connection Type for Individual Resources

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

>> Highlight the desired resource in the list of selected resources on the Select Rooms screen, right-click to see the short-cut menu, and choose the appropriate setting.

A check mark indicates the current setting.
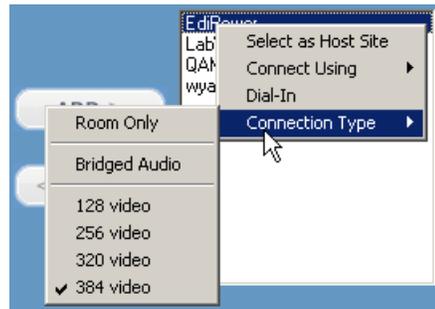
Adding a Guest to a Videoconference

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 or an employee in a remote office without an IP connection into the network, and you want to be able to conference that guest in without entering the information manually each time, ask your Polycom ReadiManager LX100 administrator to set them up as an Off Net resource. Selecting an offnet 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 Schedule Rooms screen, 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.

   • **Connect Type.** Whether the connection to the guest is IP or ISDN.

   • **Dial Out or Dial In.** Whether the conference will dial out to the guest, or the guest will dial in.

   • **Number.** The IP or ISDN number the Network Aware Scheduler will use to reach the guest, if the call is auto-started.

3. Click **OK**.

Using Advanced Settings

The Schedule Conference screen contains a button labeled **Advanced Settings**. Clicking it opens a dialog box in which you can specify default settings for these important scheduling details:

❑ Template Selection

❑ Type of Conference

❑ Dial Options

❑ Force MCU Usage

❑ Auto-Start Conferences

❑ Video Mode

❑ Speed

❑ People + Content

❑ T120 Mode

❑ Chair Control PIN

Note: The ability to view and change Advanced Settings depends on your permission settings. If you do not see an **Advanced** button on the Confirm Selections page, your Polycom ReadiManager LX100 administrator will have already set the Advanced Setting values. For more information, contact your Polycom ReadiManager 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) can use this setting and then simply use 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.

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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 15.

Note: When selecting the Dial-in 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 continue to be set to dial-in. If you want them to be dial-out, you will need to uncheck "Dial-in" on an individual basis.

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 modes 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.
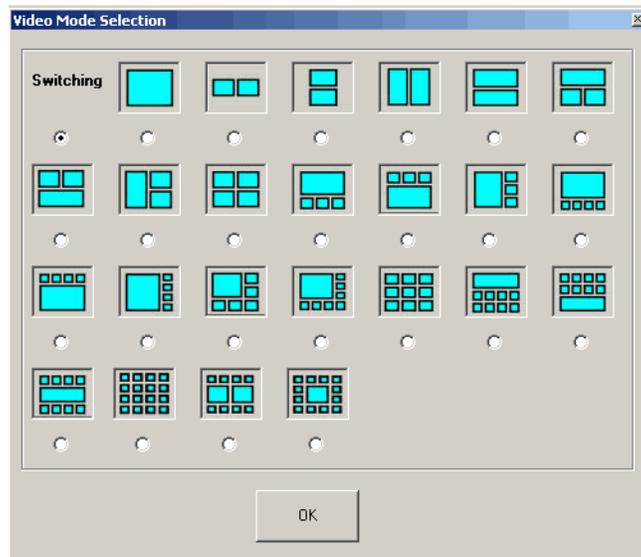
Using Auto-Start or Manual Start for a Conference

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 setup 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 in the Advanced Settings dialog box 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. However, 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 data and video 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 video conference and the other as the presentation conference. This selection supports both IP and ISDN.

Using T.120

Polycom ReadiManager 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 Setting the Host Site for a Multipoint Call

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Managing Scheduled Conferences

After a videoconference has been scheduled, you can make changes to it or delete it.

A list of the conferences you create appears on the front page of the scheduling wizard, in chronological order. (Earliest dates are at the bottom of the list.)

To make changes to an existing, future conference

You can make changes to a conference that is scheduled for the future.

Although you can open a conference that has already started, it isn't possible to make changes to a conference that has already started from the scheduling wizard. If you need to changes an active conference, contact your Polycom ReadiManager LX100 administrator.

1. On the home page of the scheduling wizard, click the name of the conference. (If necessary, scroll to bring the conference into view.)

    Polycom ReadiManager LX100 loads the existing conference.

2. Use the right arrow and left arrow buttons to move through the screens and make desired changes to the rooms, conference time, guests, and notes.

3. When finished making changes, click **Finish** on the Confirm Selections page.

To delete a conference

If you delete a conference that is scheduled for the future, the conference is cancelled. If you delete a conference that has already occurred, it is removed from the list.

1. On the Home page of the scheduling wizard, click the box next to the conference you want to delete.
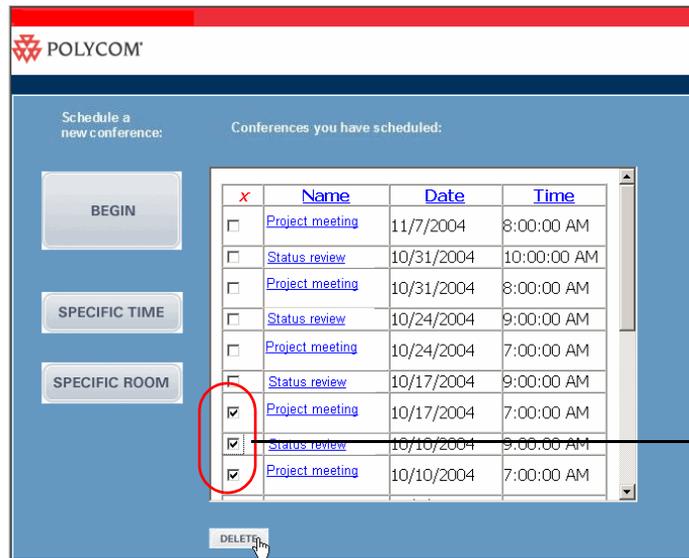
Check the box next to the conference you want to delete.

Then click the Delete button.

2. Click the **Delete** button.

3. When asked to confirm, click **Yes**.

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

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