



▶ Polycom® CMA™ System  
Web Scheduling Guide

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# Polycom<sup>®</sup> CMA<sup>™</sup> System Overview

This chapter provides an overview of the Polycom<sup>®</sup> Converged Management Application<sup>™</sup> (CMA<sup>™</sup>) system and includes these topics:

- [Scheduling Overview](#)
- [Log Into the Polycom CMA System](#)
- [General Scheduling Information](#)
  - [Scheduling Participants and Endpoints](#)
  - [Bridge Selection and Cascading](#)
  - [Bridge Scheduling and Reassignment](#)
- [Field Input Requirements](#)
  - [Field Input Requirements](#)
  - [Filter and Search a List](#)
- [Change Password](#)
- [Log Out of the Polycom CMA System](#)

## Scheduling Overview

The Polycom CMA system allows users with basic or advanced Scheduler Permissions to schedule conferences from their desktops.

Using the simple Polycom CMA system Web Scheduler interface, schedulers can create one-time or recurring conferences in a manner similar to their favorite calendar application. Or schedulers with the Microsoft Outlook<sup>®</sup> or IBM<sup>®</sup> Lotus Notes<sup>®</sup> can use the Polycom Scheduling Plugins to schedule conferences.

## Log Into the Polycom CMA System

To log into the Polycom CMA system web interface, you need:

- Microsoft Internet Explorer® 6.0, 7.0 or 8.0, Mozilla FireFox® 3.5 or 3.6, or Apple Safari 3.2 or 4.0
- Adobe® Flash® Player 9.x or 10.0.x
- The IP address or host name of the Polycom CMA system server and your username, password, and domain.

You get three opportunities to enter the correct password. After three failed attempts, the system returns an error message.

### To log into a Polycom CMA system

- 1 Open a browser window and in the **Address** field enter the Polycom CMA system server IP address or host name.
  - If prompted to install the Adobe Flash Player, click **OK**.
  - If you receive an **HTTPS Security Alert**, click **Yes**.  
To eliminate these HTTPS certificate security alerts in the future, contact your system administrator.
- 2 When the Polycom CMA system **Log In** screen appears, enter your **Username** and **Password**.
- 3 If necessary, select a different **Language** or **Domain**.
- 4 Click **Login**.

Because the Polycom CMA system is a role-based system, you see only the pages and functions available to your roles.

## General Scheduling Information

You may find the following general topics useful when you are scheduling conferences.

- [Scheduling Participants and Endpoints](#)
- [Bridge Selection and Cascading](#)
- [Bridge Scheduling and Reassignment](#)
- [Field Input Requirements](#)
- [Filter and Search a List](#)

## Scheduling Participants and Endpoints

When you schedule conferences, you select the participants you wish to join the conference from your endpoint directory. Depending on your system configuration, your endpoint directory may be the enterprise LDAP directory or the Global Address Book. It may also include Guest Book entries.

For participants that have multiple endpoints registered with the Polycom CMA system, the system selects the participant's default endpoint. You can change to another endpoint by selecting it from the **Call Info** list or by editing the participant.

You can schedule participants without endpoints into conferences. You cannot schedule endpoints without owners into conferences. The Polycom CMA system can be configured to allow you to overbook dial-in participants. In this case, dial-in participants can be scheduled to dial into multiple conferences during the same time period, but the system reserves resources for the participant for only the first scheduled conference. Dial-out participants cannot be scheduled into multiple conferences.

For the same reason, if you schedule participants with endpoints such as Polycom CMA Desktop, HDX, VVX, or VSX systems into conference as **Dial In** endpoints, the conference will require external MCU resources.

## Bridge Selection and Cascading

When a conference is scheduled with one of the Polycom CMA system scheduling applications (Web Scheduler or Scheduling Plug-in for Microsoft Outlook or IBM Lotus Notes) and the conference requires external MCU resources (such as a Polycom RMX or MGC system), then by default the Polycom CMA system automatically assigns the conference to a bridge. However, the system allows users with advanced scheduler permissions to select a bridge for their conferences. It also allows them to create multibrige, cascaded conferences.

### Bridge Selection

When scheduling a conference, users with advanced scheduler permissions can select a bridge to host their conference by selecting the **Single Bridge** option. When they select this option, the system presents a list of bridges that have the capabilities and resources required to host their conference.

Because this bridge list depends on the template selection and conference settings, users should make their template selection and conference settings before selecting a bridge. Otherwise, they may select a bridge that cannot meet their conferencing requirements. In this case, the conference will fail to schedule.

### Bridge Selection and Cascading Conferences

When scheduling a conference, users with advanced scheduler permissions can select the **Multi Bridge** option to create cascading conferences.

In some respects, a cascaded conference looks like a single conference, but it is actually two or more conferences on different bridges that are linked together. The link is created by a dial-out from one conference to a second conference via a special cascaded entry queue.

Some reasons you may wish to create cascading conferences include:

- To invite more conference participants than any single bridge can host
- To connect different bridges at different sites into a single conference
- To use the different capabilities of different bridges (for example, different communication protocols, such as, serial connections, ISDN, etc.)

When you create a multibrige, cascaded conference, you must manually select bridges and create the cascaded links between bridges by identifying the originating bridge, the terminating bridge, and the network type (IP or ISDN). The system displays an interconnection diagram that illustrates the cascaded links. Once scheduled, each cascaded link appears as a participant in the conference.

By default, the system automatically assign participants to the “best bridge” for them based on available capacity, location, and least cost routing rules. However, you may also choose to manually assign participants to bridges.

## Bridge Scheduling and Reassignment

When a conference is scheduled with one of the Polycom CMA system scheduling applications (Web Scheduler or Scheduling Plug-in for Microsoft Outlook or IBM Lotus Notes), by default the system automatically assigns the conference to a bridge unless a user with advanced scheduler permissions intercedes. If that bridge is down at the time the system starts the conference, the Polycom CMA system attempts to dynamically reassign the conference to another bridge with sufficient capabilities and resources.

- If the system can successfully reassign the conference to another bridge, the conference starts on the newly selected bridge, and the system sends an updated conference email to all scheduled participants. This updated email includes a new dial-in number that dial-in participants must use to join the conference.
- If the system cannot successfully reassign the conference to another bridge, the conference fails to start. The system sends an email to notify the conference organizer of the failure.

Some notes about bridge reassignment:

- The bridge reassignment process only occurs when the system detects that a bridge is down. It does not occur if the system determines that a bridge does not have sufficient resources required to host the conference.



- If the Polycom CMA system cannot find another bridge with the features and capacity needed to support a conference, the conference fails to start. The system does not attempt to modify the conference settings in any way. Instead, the system sends an email to notify the conference organizer of the failure.
- The system will chain bridge reassignments. This means that if the next bridge to which the system assigns a conference is down at the time the system tries to start the conference, the system will try to reassign the conference again.
- If the bridge to which the system reassigns a conference has ad hoc conferences on it, the Polycom CMA system is unaware of those conferences. The reassigned conference may fail to start if ad hoc conferences are consuming resources the Polycom CMA system expected to schedule. This is known behavior and is avoided by applying the best practice of not using bridges for both scheduled and ad hoc conferences.

## Field Input Requirements

While every effort was made to internationalize the Polycom CMA system, not all system fields accept Unicode entries. If you work in a language other than English, be aware that the Polycom CMA system fields that accept only ASCII characters are shaded a light yellow.

For information about specific field requirements, see “[System Field Input Requirements](#)” on page 549.

## Filter and Search a List

In the Polycom CMA system interface, information is often summarized in lists or grids.

Lists that include many items may have filters or searchable fields, which allow you to view a subset of items or search for a specific entry. The available filtering options depend on the type of information in the list. For example in the conference list:

- If you select **Custom Date** as the filter, a calendar filter field appears
- If you select **Ongoing Plus** as the filter, an attribute option appears. You can select the attribute **Conference Name** and enter all or part of the conference name into the associated text field.

In general, most text filter fields are ASCII only and the Polycom CMA system search function is a case-insensitive, substring search. That means when you enter a search string, the Polycom CMA system looks for that string wherever it occurs (beginning, middle, or end) in the word or number.

However, if the Polycom CMA system is integrated with an Active Directory, the Polycom CMA system uses the LDAP search function for searches of the directory. LDAP searches are prefix-searches that include an appended wildcard. In this case, when you enter a search string, the system looks for that search string only at the beginning of the indexed fields.

For example, all of the following searches for a participant will find Barbara Smithe:

- Barbara
- Smi the
- Bar
- Smi

To optimize LDAP searches, the Polycom CMA system (and its dynamically-managed endpoints) searches only indexed LDAP fields and a limited set of attributes. The attributes include:

- Obj ectCategory
- memberOf
- Di spl ayName
- Gi venName
- Sn
- Cn
- Samaccountname
- groupType
- di sti ngui shedName
- obj ectGui d

These are the requested attributes to be returned by the search:

- Sn
- Gi venname
- Mai l
- Ou
- Obj ectgui d
- Tel ephonenumbe r
- Cn
- Samaccountname
- Memberof
- Di spl ayname
- Obj ectcl ass
- Ti tl e
- l ocal i tyName
- department

## Change Password

Local users of the Polycom CMA system must change their passwords every 90 days. Access rules for enterprise users is managed by Microsoft Active Directory.

### To change your system password

- 1 Click **Settings** in the top-right corner of the page.
- 2 Click **Change Password**.
- 3 Enter your **Old Password**.
- 4 Enter a **New Password**. This password must be at least 8 characters long.
- 5 Confirm the new password and click **OK**.

## Log Out of the Polycom CMA System

### To log out of the Polycom CMA system

- Click **Log Out** in the top-right corner of the page.



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# Conference Scheduling Overview

This chapter describes the scheduling and conference views, navigation, and commands of the Polycom CMA system. It includes these topics:

- [Conference Menu and Views](#)
  - [Conference Views—Future and Ongoing](#)
  - [Conference States](#)
  - [Context-Sensitive Conference Commands](#)
- [User Menu and Guest Book](#)
  - [Context-Sensitive Guest Book Commands](#)
  - [Add a Guest to the System Guest Book](#)
  - [Edit a Guest in the System Guest Book](#)
  - [Delete a Guest from the System Guest Book](#)



## Conference Menu and Views

The Polycom CMA system **Conference** menu provides these views of the **Conference** list:

- **Future**—Displays the list of future conferences in the main window. Use this view to view and edit future conferences.
- **Ongoing**—Displays the list of active conferences in the main window. Use this view to manage ongoing conferences.

Note that with **Scheduler Permissions**, you only see and manage the conferences you created.




The **Conference** views have these sections.


Section	Description
Views	The views you can access from the page.
Conference Actions	<p>The set of available commands. The constant commands in the <b>Conference</b> views are:</p> <ul style="list-style-type: none"> <li>• <b>Refresh</b>  —Use this command to update the display with current information.</li> <li>• <b>Add</b>  —Use this command to create a new video and/or audio conference.</li> </ul>
Conference List	The context-sensitive <b>Conference</b> list for the selected view.
Conference Details	Displays information about the selected conference. For more information, see <a href="#">“Conference Details”</a> on page 47.
Conference Features	Displays the status of system features for the selected conference. For more information, see <a href="#">“Conference Features”</a> on page 49.
Bridge (MCU) Features	Displays the status of MCU features for the selected conference. For more information, see <a href="#">“Bridge (MCU) Features”</a> on page 50.
Participants	Displays the list of participants for the selected conference. For more information, see <a href="#">“Participants List”</a> on page 51.
Participant Details	Displays information about the participant selected in the <b>Participants</b> list. For more information, see <a href="#">“Participant Details”</a> on page 52.

## Conference Views—Future and Ongoing

When you log into the Polycom CMA system with **Scheduler Permissions**, you see the **Conference** and **User** menus and the **Future** view is displayed. You can also select the **Ongoing** view.





The **Conference** list in both the **Future** and **Ongoing** view has these fields.

Field	Description
Filter	<p>Use the filter to display other views of the conference list, which include:</p> <ul style="list-style-type: none"> <li>• <b>Future Only</b> - Displays scheduled conferences that have not yet started</li> <li>• <b>Today Only</b> - Displays scheduled conferences (completed, active, or future) for the current day and active ad hoc conferences</li> <li>• <b>Custom Date</b> - Displays scheduled conferences (completed, active, or future) for a selected day. Select the day from the calendar.</li> <li>• <b>Ongoing Plus</b> - Displays active and future scheduled conferences for the day. You can further filter this request by <b>Owner</b>, <b>Conference Name</b>, <b>Endpoint Name</b>, and <b>Bridge</b>.</li> <li>• <b>Today Plus</b> - Displays scheduled conferences (completed, active, or future) for the current day, current ad hoc conferences, and all future conferences. You can further filter this request by <b>Owner</b>, <b>Conference Name</b>, <b>Endpoint Name</b>, and <b>Bridge</b>.</li> <li>• <b>Yesterday Plus</b> - Displays completed scheduled conferences for yesterday and earlier. You can further filter this request by <b>Owner</b> and <b>Conference Name</b>.</li> </ul> <p>For information on filters, see <a href="#">“Filter and Search a List”</a>.</p>
Export as Excel file	Use this button to download the Conference list as currently displayed to a Microsoft Excel spreadsheet.
Status	The state of the conference. For more information, see <a href="#">“Conference States”</a> on page 12.
Type	<p>The type of scheduled conference. Possible values include:</p> <ul style="list-style-type: none"> <li>• <b>Video Conference</b>  —All conference participants have video endpoints.</li> <li>• <b>Audio Only Conference</b>  —All conference participants have audio endpoints. Audio only conferences require an MCU.</li> <li>• <b>Recurring Conference</b>  —The conference is one in a recurring series.</li> <li>• <b>Multi-Bridge Conference</b> —The scheduler assigned the conference to multiple bridges and created bridge links.</li> </ul>



Field	Description
Conference Name	The system- or scheduler-assigned name of the conference. By default, the system assigns a conference name and appends the day and date to that name. The scheduler can change the system-assigned name.
Start Time	The user-assigned start time for the conference. The system appends the time difference between the local time and the standard time.
Bridge	If applicable, the user-assigned bridge for the conference. Possible values are: <ul style="list-style-type: none"> <li>• <b>N/A</b>—A bridge is not required for the conference.</li> <li>• <b>&lt;Bridge Name&gt;</b>—The user assigned the conference to a single bridge. In this case, the bridge name is displayed.</li> <li>• <b>Multi bridge</b> —The user assigned the conference to multiple bridges and created bridge links.</li> </ul>
Owner	The conference creator.

## Conference States



Conferences may be in the following states.






State	Description
Future Conference 	Scheduled conference that has not yet started. This conference state is possible in all views except the <b>Yesterday Plus</b> view.
Completed Conference 	A scheduled conference that occurred in the past. This conference state is possible in all views except the <b>Future</b> and <b>Ongoing Plus</b> view.
Active Conference 	A conference that is still active/ongoing. This conference state is possible in all views except the <b>Future</b> and <b>Yesterday Plus</b> view.
Active Alerts Conference 	The bridge on which the active/ongoing conference is being hosted has sent an alert. Examples of events that will trigger a bridge alert are: <ul style="list-style-type: none"> <li>• A participant is connected in secondary mode (audio only).</li> <li>• A conference is not yet full (i.e., not all scheduled participants have joined the conference).</li> </ul>



State	Description
Declined Conference 	Applies only to conferences scheduled through the Polycom Scheduling Plugin for Microsoft Outlook. This state indicates that most participants did not accept the conference invitation.
Conference End Warning 	The conference is ending, i.e., it is in its last five minutes unless someone extends it.

## Context-Sensitive Conference Commands

Besides the constant **Refresh**  and **Add**  commands, the **Actions** section may include these context-sensitive commands depending on the type of conference selected.

Command	Description
<b>Available for future conferences only</b>	
Edit 	Use this command to edit the selected conference. For more information, see <a href="#">“Edit a Conference”</a> on page 23.
<b>Available for future and past conferences</b>	
Delete 	Use this command to delete the selected conference.
<b>Available for future, past, and active conferences</b>	
Copy 	Use this command to copy the selected conference.
<b>Available for active conferences only</b>	
Manage 	Use this command to display the <b>Manage Conference</b> page for the conference selected in the <b>Conference List</b> . Use this command to manage participants and endpoints in the selected active conference. For more information, see <a href="#">“Manage an Active Conference”</a> on page 29.
Terminate 	Ends the selected conference.

## User Menu and Guest Book

The Polycom CMA system **User** menu provides access to the system **Guest Book**. The **Guest Book** is a system-wide directory that includes guest participants who were added explicitly or saved during scheduling to the **Guest Book**. They are referred to as static entries because they are not imported through the dynamically updated enterprise directory or included in the system Global Address Book. The **Guest Book** is limited to 500 entries.

The **Guest Book** has these fields.

Field	Description
Name	The guest's first and last name.
Email	The guest's email address. The system validates the email structure only.
Location	The location of the guest's endpoint system. This is a free-form entry field that the system does not validate.
Number	(Optional) The ISDN phone number for the user. This number is constructed from the Country code + Area/City code + phone number or entered as the modified dial number.
Join Mode	Indicates whether the guest will use an audio endpoint or video endpoint to join conferences.
Dial Options	Indicates whether the guest will dial into conferences, or that the system should dial out to the guest.
Dial Type	Indicates whether the guest has an IP (H.323) or ISDN (H.320) endpoint.

## Context-Sensitive Guest Book Commands

The **Actions** section of the Guest Book page may include these context-sensitive commands depending on the type of conference selected.

Command	Description
Add Guest	Use this command to add a new guest user.
Edit Guest	Use this command to change information for a guest user.
Delete Guest	Use this command to delete a guest from the Guest Book. Deleting a guest is a permanent operation.

## Add a Guest to the System Guest Book

### To add a guest to the system Guest Book

- 1 Go to **User > Guest Book** and click **Add Guest**.
- 2 Configure the **Guest Information** section of the **Add New Guest** dialog box.

Field	Description
First Name	The guest's first name
Last Name	The guest's last name
Email	The guest's email address. The system validates the email structure only.
Location	The guest's location of the guest's endpoint system. This is a free-form entry field that the system does not validate.
Dial Type	Specify the protocol that the guest's endpoint supports; either IP (H.323) or ISDN (H.320).
Join Mode	Specify whether the guest will use an audio endpoint or video endpoint to join conferences.  <b>Note</b> A guest may have multiple endpoints. To create , create a separate guestbook entry for each endpoint.
Dial Options	Specify whether the guest will dial into conferences, or that the system should dial out to the guest.  <b>Note</b> To support both options, create a separate guestbook entry for each.

### 3 If the guest has an IP (H.32.3) endpoint, configure:

Field	Description
IP Address	The IP address of the guest's video or audio endpoint.
Extension	The specific dial string for the guest. For Annex-O dialing, enter the H.323.alias@IP here, for example: <ul style="list-style-type: none"> <li>1001@11.12.13.14</li> <li>1001@domain.com</li> <li>username@domain.com</li> <li>username@11.12.13.14</li> </ul> <b>Note</b> Polycom endpoints must register with a gatekeeper before they'll attempt an Annex-O call.
MCU Service	Choose from the list of MCU services defined on the MCUs that the Polycom CMA system has registered. Leave this at <b>Any Available Service</b> unless you have specific knowledge of MCU services.

**Note**

The Extension field in this dialog box cannot be configured.

- 4 If the guest has an ISDN (H.320) endpoint and a modified dialing number (with a prefix or postfix):
  - a Click **Use Modified Dial Number**.
  - b Configure these settings:

Field	Description
Number	The participant's phone number.
MCU Service	Choose from the list of MCU services defined on the MCUs that the Polycom CMA system has registered. Leave this at <b>Any Available Service</b> unless you have specific knowledge of MCU services.

**Note**

The Extension field in this dialog box cannot be configured.

- 5 If the guest has an ISDN (H.320) endpoint but no modified dialing number, configure these settings:

Field	Description
Country	The country to which the system will dial out to the guest.
Area/City Code	The area code to which the system will dial out to the guest.
Number	The participant's phone number.
MCU Service	Choose from the list of MCU services defined on the MCUs that the Polycom CMA system has registered. Leave this at <b>Any Available Service</b> unless you have specific knowledge of MCU services.

**Note**

The Extension field in this dialog box cannot be configured.

- 6 Click **OK**.

## Edit a Guest in the System Guest Book

### To edit a guest in the system Guest Book

- 1 Go to **User > Guest Book** and select the guest of interest.
- 2 Click **Edit Guest**.
- 3 Change the **Guest Information** section and endpoint information sections of the **Add New Guest** dialog box, as needed. For more information about these fields, see [“Add a Guest to the System Guest Book”](#) on page 14.
- 4 Click **OK**.

## Delete a Guest from the System Guest Book

### To delete a guest from the system Guest Book

- 1 Go to **User > Guest Book** and select the guest of interest.
- 2 Click **Delete Guest**.
- 3 Click **Yes** to confirm the deletion.



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# Conference Management Operations

This chapter describes the Polycom® Converged Management Application™ (CMA™) system conference management operations. It includes these topics:

- [Add/Schedule a Conference](#)
- [Edit a Conference](#)
- [Copy a Conference](#)
- [Edit a Participant's Settings](#)
- [Edit a Room's Settings](#)
- [View Scheduling Information for a Conference](#)
- [Manage an Active Conference](#)
- [Add Additional Participants to an Active Conference](#)
- [Add a Room to an Active Conference](#)
- [View the Video of a Participant in an Active Conference](#)
- [Manage a Participant's Endpoint During a Conference](#)
- [View a Participant's Details During a Conference](#)
- [Terminate an Active Conference](#)
- [Delete a Conference](#)

## Add/Schedule a Conference

**To add or schedule a new conference**

- 1 Go to **Conference > Future** and click **Add** .
- 2 In the conference scheduling page, enter a **Conference Name** and set a conference **Start Date**, **Start Time**, and either an **End Time** or **Duration**.

- 3 To make the conference recurring:
  - a Click **Recurrence** and in the **Appointment Recurrence** dialog box, set:
    - » Recurrence frequency (**Daily**, **Weekly**, or **Monthly**)
    - » Recurrence day (Sunday through Saturday)
    - » Recurrence range (**Start** date and **End After** occurrences or **End by** date)

The maximum number of recurrences is 365.
  - b Click **OK**.
- 4 For a **Video** conference, you can change the template by clicking **Default Template** and selecting a different template.



- Conference templates provide default conference settings. When you select a different template, you are changing the default conference settings for your conference.
- The **Default Template** and **Default Audio Templates** are stored in the system database and their names are not localized.

- 5 For an **Audio Only** conference:
  - a Change the **Conference Type** to **Audio Only**.
  - b To change the template, click **Default Audio Template** and select a different template.
- 6 To add conference participants from the local directory or enterprise directory:
  - a Enter all or part of a participant's **Last Name** or **First Name** into one of the name fields and click **Add Participants**.
 

The **Add Participants** dialog box appears with the list of participant names that meet your search criteria.



- Depending on the search domain, the search function may return different results. See "[Filter and Search a List](#)" on page 5.
- The search results only include participants associated with endpoints.

- b Select the participant's name from the list.
 

The participant's name appears in the underlying **Selected Participants and Rooms** list.
  - c Repeat steps a and b to add all domain participants and then click **Close**.
- 7 To add a guest from the **Guest Book**:
  - a Click **Add From Guest Book**.



- b** In the **Add From Guest Book** dialog box, select the guest’s name from the list.  
The guest’s name appears in the underlying **Selected Participants and Rooms** list.
  - c** Repeat step **b** to add all participants from the **Guest Book** and then click **Close**.
- 8** To add new guest participants (participants not available from the local directory, enterprise directory, or **Guest Book**):
- a** Click **Add Guest**.
  - b** In the **Add Guest** dialog box, enter the following required participant information: **First Name**, **Last Name**, **Email** address, and **Location**. Note that the system allows duplicates in guest book entries. Also, the **Email** address field is ASCII only. For more information, see [“Field Input Requirements”](#) on page 5.
  - c** Specify how the participant will join the conference.

Setting	Description
In Person	The participant will attend the conference by going to a room that is included in the conference or joining another participant who is attending the conference.
Audio Only	The participant will attend the conference by telephone. The system will either call out to the participant or the participant will dial in.
Use Video	The participant will attend the conference using a video endpoint system. The system will either call out to the participant or the participant will dial in.

- d** For a guest with an audio endpoint, set **Dial Type** to **IP** or **ISDN** as needed.
- e** For a guest with a video endpoint system:
  - » Set the **Bit Rate**, **Dial Options**, and **Dial Type** as required. You can change the connection speed for an endpoint up to the maximum speed specified by the conference template.
  - » If you select **Dial Out** and a **Dial Type** of **IP**, enter the guest’s phone **Number**.
  - » If you select **Dial Out** and a **Dial Type** of **ISDN** and the system must use a specific dialing prefix to call the guest, select **Use Modified Dial Number** and enter the guest’s complete phone number including prefix, country code, area or city code, and phone number.

- » If you select **Dial Out** and a **Dial Type** of **ISDN** and the system does not need to use a specific dialing prefix to call the guest, select the appropriate **Country** and enter the guest's **Area/City Code** and phone **Number**.

**f** Select **Save to Guest Book** to have this guest participant added to the system **Guest Book**.

**g** Click **OK**.

The guest's name appears in the **Selected Participants and Rooms** list.

**9** Adjust the conference date and time as needed to match participant and endpoint availability.

**a** Review their availability and adjust the conference date and time as needed.



- For participants who are associated with endpoints, the Polycom CMA system schedules their availability according to the endpoint's availability.
- For participants with multiple endpoints, you must check the availability for each endpoint. Click **Call Info** to change the participant's endpoint.
- Dial-in participants can be scheduled to dial into multiple conferences during the same time period; dial-out participants cannot.

**b** To edit a participant's dial settings, select the participant from the **Selected Participants and Rooms** list and click **Edit**. For more information on editing participants settings, see "[Edit a Participant's Settings](#)" on page 25.

**10** To add conference rooms to the **Selected Participants and Rooms** list:

**a** Click **Select Site**.

**b** Select the site of interest from the site list

The conference room list for the selected site appears.

**c** Select the conference room of interest from the list.

The conference room name appears in the underlying **Selected Participants and Rooms** list.

**d** Repeat steps **b** and **c** to add all required conference rooms and then click **OK**.

**11** Once you've added your participants, you can assign them leadership roles:

**a** To assign a participant the lecturer role, in the **Lecturer** field select the participant's name from the list.

**b** To assign a participant the video chairperson role, in the **Video Chairperson** field select the participant's name from the list.



- If the **Lecturer** or **Video Chairperson** features are not available, then either you do not have permission to implement these features or the selected template does not support these features.
- To be assigned **Lecturer**, a participant must have a manageable video endpoint.

**12** If you have advanced scheduler permissions, now is the time to edit conference settings and make bridge selections. For more information, see [“Advanced Scheduling Operations”](#) on page 39.

**13** To edit a participant’s dial settings, select the participant from the **Selected Participants and Rooms** list and click **Edit**. For more information on editing participants settings, see step 5 on page 25.

**14** When finished, click **Schedule**.

The system verifies that it has a bridge with the capabilities and resources required for your conference. If it does, the conference notification email appears with a message indicating **Conference Successfully Scheduled**.

**15** To exit without sending an email to your participants, click **Skip Email**.

**16** To send an email notification to your participants:

- a** Copy additional people on the notification and/or add notes about the conference.

Note that the **To**, **CC**, and **BCC** fields are ASCII only. For more information, see [“Field Input Requirements”](#) on page 5.

- b** As needed, add information in the **Enter additional notes to include in the email** section.

- c** Click **Send**.


The system sends the conference notification email. The **Future** view appears. Your conference appears in the conference list.

The email that the Polycom CMA system sends can be read by email systems that accept plain text emails, iCal attachments, or vCal attachments.

## Edit a Conference

Only future conferences can be edited. Active or past conferences cannot be edited.

### To edit a future conference

- 1 Go to **Conference > Future**.
- 2 Select the conference of interest and click **Edit** .

- 3 If you select a recurring conference, a dialog box appears asking if you want to edit all conferences in the series or just the selected one. Make the appropriate choice and click **Edit**.

The conference scheduling page appears.

- 4 For a **Video** conference, you can change the template by clicking **Default Template** and selecting a different template.



- Conference templates provide default conference settings. When you select a different template, you are changing the default conference settings for your conference.
- The **Default Template** and **Default Audio Templates** are stored in the system database and their names are not localized.

- 5 For an **Audio Only** conference:

- a Change the **Conference Type** to **Audio Only**.

- b To change the template, click **Default Audio Template** and select a different template.

- 6 Make the required changes to the conference date, participants, rooms, or other settings. For information on performing these tasks, see [“Add/Schedule a Conference”](#) on page 19.

- 7 When finished, click **Schedule**.

The system verifies that it has a bridge with the capabilities and resources required for your conference. If it does, the conference notification email appears with a message indicating **Conference Successfully Scheduled**.

- 8 To exit without sending an updated email to your participants, click **Skip Email**.

- 9 To send an updated email to your participants:

- a Copy additional people on the notification and/or add notes about the conference.

Note that the **To**, **CC**, and **BCC** fields are ASCII only. For more information, see [“Field Input Requirements”](#) on page 5.


- b Click **Send**.

The system sends the updated conference notification email. The **Future** view appears. Your conference appears in the conference list.

## Copy a Conference

Future, ongoing, or past conferences can be copied as a template for a future conference.


### To copy a conference

- 1 Go to the appropriate conference view.
- 2 Select the conference of interest and click **Copy** .
- 3 If you used a template other than the default when you created the conference, reselect the template.
- 4 Make the required changes to the conference date, participants, rooms, or other settings. For information on performing these tasks, see [“Add/Schedule a Conference”](#) on page 19.
- 5 When finished, click **Schedule**.  
The system verifies that it has a bridge with the capabilities and resources required for your conference. If it does, the conference notification email appears with a message indicating **Conference Successfully Scheduled**.
- 6 To exit without sending an updated email to your participants, click **Skip Email**.

## Edit a Participant's Settings

Participant's settings for future scheduled conferences may be edited. You cannot edit a participant's settings for an active or past conference.

### To edit a participant's settings

- 1 Go to **Conference > Future**.
- 2 Select the conference of interest and click **Edit** .
- 3 If you select a recurring conference, a dialog box appears asking if you want to edit all conferences in the series or just the selected one. Make the appropriate choice and click **Edit**.
- 4 In the conference scheduling page, select the participant of interest from the **Selected Participants and Rooms** list and click **Edit**.
- 5 In the **Edit Participant Settings** dialog box, edit the participant settings as required.
  - a Select the participant's endpoint, if the participant has more than one available.

**b** Specify how the participant will join the conference.

Setting	Description
In Person	The participant will attend the conference by physically joining another participant who is attending the conference.
Audio Only	The participant will attend the conference by telephone. The system will either call out to the participant or the participant will dial in.
Use Video	The participant will attend the conference using a video endpoint system. The system will either call out to the participant or the participant will dial in.

**c** For a participant with an audio-only endpoint, set **Dial Type** to **IP** or **ISDN** as required.

**d** For a participant with a video endpoint:



Not all of these settings are applicable to all endpoint types, so some selections may be grayed out. See your endpoint documentation to understand supported settings.


- » Set the **Bit Rate**, **Dial Options**, and **Dial Type** as required. You can change the connection speed for an endpoint up to the maximum speed specified by the conference template.
- » If you select **Dial Out** and a **Dial Type** of **IP**, enter the guest's phone **Number**.
- » If you select **Dial Out** and a **Dial Type** of **ISDN** and the system must use a specific dialing prefix to call the guest, select **Use Modified Dial Number** and enter the guest's complete phone number including prefix, country code, area or city code, and phone number.
- » If you select **Dial Out** and a **Dial Type** of **ISDN** and the system does not need to use a specific dialing prefix to call the guest, select the appropriate **Country** and enter the guest's **Area/City Code** and phone **Number**.

**6** Click **OK**.

## Edit a Room's Settings

You can edit a room's call settings for future scheduled conferences. The changes apply only to the selected conference.

### To edit a room's settings

- 1 Go to **Conference > Future**.
- 2 To delete a past conference, select the appropriate filter (such as **Yesterday Plus**).
- 3 Select the conference of interest and click **Edit** .
- 4 If you select a recurring conference, a dialog box appears asking if you want to edit all conferences in the series or just the selected one. Make the appropriate choice and click **Edit**.
- 5 In the conference scheduling page, select the room of interest from the **Selected Participants and Rooms** list and click **Edit**.
- 6 In the **Edit Room Settings** dialog box, edit the room settings as required.
  - a Select the room's endpoint, if the room has more than one available.
  - b For a room with an audio endpoint, set **Dial Type** to **IP** or **ISDN** as required.
  - c For a room with a video endpoint:



Not all of these settings are applicable to all endpoint types, so some selections may be grayed out. See your endpoint documentation to understand supported settings.

- » Set the **Bit Rate**, **Dial Options**, and **Dial Type** as required. You can change the connection speed for an endpoint up to the maximum speed specified by the conference template.
- » If you select **Dial Out** and a **Dial Type** of **IP**, enter the room's phone **Number**.
- » If you select **Dial Out** and a **Dial Type** of **ISDN** and the system must use a specific dialing prefix to call the room, select **Use Modified Dial Number** and enter the room's complete phone number including prefix, country code, area or city code, and phone number.
- » If you select **Dial Out** and a **Dial Type** of **ISDN** and the system does not need to use a specific dialing prefix to call the room, select the appropriate **Country** and enter the room's **Area/City Code** and phone **Number**.



- 7 Click **OK**.

## View Scheduling Information for a Conference

### To view the scheduling information for a conference

- 1 To see the scheduling information for a future conference, go to **Conference > Future**. To see the scheduling information for an active conference, go to **Conference > Ongoing**.
- 2 From the list of **All Conferences**, select the conference of interest and click **View**.

The **View** conference page appears displaying the following details about the conference:


Section	Description
Start Date	The date on which the conference started or will start.
End Date	The date on which the conference is scheduled to end.
Duration	The scheduled duration of the conference in hours and minutes.
Recurrence	The recurrence information for the conference.
Owner	The person who scheduled the conference.
Type	The type of conference. Possible values include: <ul style="list-style-type: none"> <li>• Audio Only </li> <li>• Audio Video </li> </ul>
Conference Password	The conference password assigned by the system to the conference. For future conferences, users with <b>Advanced Scheduler</b> permissions can change this conference password. See <a href="#">"Edit Conference Settings"</a> on page 39.
Chairperson	Whether or not the conference has a chairperson. This field will include a participant's name or N/A. For future conferences, users with <b>Advanced Scheduler</b> permissions can assign a conference chairperson. See <a href="#">"Edit Conference Settings"</a> on page 39.
Participants List	Information for the participant, including <ul style="list-style-type: none"> <li>• Name</li> <li>• Dial Mode</li> <li>• Participant Type</li> <li>• Access</li> <li>• Endpoint</li> </ul>


















## Manage an Active Conference

The **Manage Conference** page provides a detailed view of a single active conference and allows you to make some changes to your active conference.

### To manage an active conference





- 1 Go to **Conference > Ongoing**.
- 2 From the list of **All Conferences**, select the conference of interest and click **Manage** .

The conference page appears in a new tab displaying the **Participants** list. The **Participants** list displays these settings:



Section	Description
Status	<p>The state of the participant's connection. Possible states include:</p> <ul style="list-style-type: none"> <li>• Idle </li> <li>• Connecting/Updating </li> <li>• Connected </li> <li>• Connected with error </li> <li>• Not muted </li> <li>• Admin muted </li> <li>• Self muted </li> <li>• Help request </li> <li>• Audio unavailable </li> <li>• Video unblocked </li> <li>• Video blocked </li> <li>• Video unavailable </li> </ul>
Type	<p>The type of conference. Possible values include:</p> <ul style="list-style-type: none"> <li>• Audio Only </li> <li>• Audio Video </li> <li>• Bridge Link</li> <li>• VIP </li> </ul>
Name	The participant's name.
Endpoint	The name assigned to the participant's endpoint when it registered or was added to the system.
Access	<p>The endpoint's network interface type. Possible values include:</p> <ul style="list-style-type: none"> <li>• H323</li> <li>• ISDN</li> </ul>

Section	Description
Address	The IP address or ISDN number of the participant's endpoint (if a dial-out).
Bit Rate	The sum of the audio and video data transfer rate (in kbps) of the participant's endpoint.
Dial Mode	How the participant joined the call. Possible values include: <ul style="list-style-type: none"> <li>Audio or Video Dial-In</li> <li>Audio or Video Dial-Out</li> </ul>
Bridge	The MCU on which the participants call resides.

Use these conference actions as needed:

Command	Use this command to...
Copy  .	Schedule a new conference that duplicates the selected conference settings.
View	View information for the selected conference.
Terminate  .	End an active conference.
Extend Duration  .	Extend the duration of an active conference.
Change Layout  .	For applicable endpoints. Change the default video layout for the conference display.
Add Participant	Add one or more participants to the selected conference.
Add Guest	Add a guest to the selected conference.
Add Room	Add one or more rooms to the selected conference.

**3** Use these participant actions as needed:

Command	Use this command to...
Remove  .	Remove the selected participant from the Participants list at which time the participant can be scheduled for another conference.
Send Message  .	Send a message to the selected participant's registered Polycom endpoint. The message appears briefly on the monitor for the selected video endpoint.

Command	Use this command to...
Save as Favorite	Function available to users with Operator permissions only and only when the selected participant has an associated endpoint to which the system can dial out. Save the selected participant to an existing Favorites List.
Connect All New	Function available only when the system is displaying the <b>New Conference Participants</b> list. Initiates the system dial out to new participants.



## Add Additional Participants to an Active Conference

You can add additional participants to an active conference. These participants can come from your local directory, enterprise directory, or guest book.



**Dial Out** is the only **Dial Option** the system allows for adding participants to an active conference.

### To add additional conference participants to an active conference


- 1 Go to **Conference > Ongoing**.
- 2 From the list of **All Conferences**, select the conference of interest and click **Manage** .
- 3 To add participants from your local directory or enterprise directory:
  - a Click **Add Participant** .
  - b Enter all or part of a participant's **Last Name** or **First Name** into the appropriate field and click **Search**.

A list appears of participant's names that meet your search criteria.



- Depending on the search domain, the search function may return different results. See ["Filter and Search a List"](#) on page 5.
- The search results only include users associated with endpoints.

- c Select the participant's name from the list.  
The participant's name appears in the underlying **New Conference Participants** list.
- d Repeat steps a and b to add all domain participants and then click **Close**.

- e If necessary, edit the new participants' settings. See [“Edit a Participant’s Settings”](#) on page 25.
- 4** To add participants from the **Guest Book**:
- a Click **Add Guest**.
  - b From the **Guest Book** dialog box, select the guest’s name from the list. The guest’s name appears in the underlying **New Conference Participants** list.
  - c Repeat step **b** to add all guest participants and then click **Close**.
- 5** To add new guest participants (participants not available from the local directory, enterprise directory, or **Guest Book**):
- a Click **Add Participant**  and then click **Add Guest**.
  - b In the **Add Guest** dialog box, enter the participant’s **Name**, **Email** address, and **Location**. Note that the **Email** address field is ASCII only.
  - c Specify how the participant will join the conference.

Setting	Description
In person	The participant will attend the conference by physically joining another participant who is attending the conference.
Use Video	The participant will attend the conference using a video endpoint system.

- d For a guest with a video endpoint:
  - » Set the **Bit Rate** and **Dial Type** as required. You can change the connection speed for an endpoint up to the maximum speed specified by the conference template.
  - » If you select a **Dial Type** of **IP**, enter the guest’s phone **Number**.
  - » If you select a **Dial Type** of **ISDN** and the system must use a specific dialing prefix to call the guest, select **Use Modified Dial Number** and enter the guest’s complete phone number including prefix, country code, area or city code, and phone number.
  - » If you select a **Dial Type** of **ISDN** and the system does not need to use a specific dialing prefix to call the guest, select the appropriate **Country** and enter the guest’s **Area/City Code** and phone **Number**.
- e Select **Save to Guest Book** to have this guest participant added to the system Guest Book.

f Click **OK**.

The participant's name appears in the underlying **New Conference Participants** list.


6 To initiate the system dial out to new participants, select the participants of interest from the **New Conference Participants** list and click **Connect New Participants**.

The system dials out to the participants and adds them to the conference.

## Add a Room to an Active Conference

**To add a room to an active conference**

1 Go to **Conference > Ongoing**.

2 From the list of **All Conferences**, select the conference of interest and click **Manage** .

3 From the **Conference Actions** list, click **Add Room**.

4 From the **Add Room** dialog box, select the site location of the room.

The list of conference rooms at the site appears.

5 Select the conference room of interest.

The conference room name appears in the underlying **New Conference Participants** list.

6 Click **Close**.


7 To initiate the system dial out to the room, select the room from the **New Conference Participants** list and click **Connect New Participants**.


The system dials out to the room endpoint system and adds the room to the conference.

## View the Video of a Participant in an Active Conference

**To view the video of a participant in an active conference**

1 Go to **Conference > Ongoing**.

2 From the list of **All Conferences**, select the conference of interest and click **Manage** .

- 3 Select a participant from the **Participants** list.  
The selected participant's video appears in the **Conference Image** section of the interface.
- 4 Click **Shuffle**  to shuffle to the next participant's video.



## Manage a Participant's Endpoint During a Conference



The **Manage** page also allows you to manage conference participant's endpoints. Essentially, you become the conference moderator.



- These context-sensitive commands only appear when the participant's endpoint supports the action.
- These commands work for rooms on the participant list as well.

### To manage a participant's endpoint


- 1 Go to **Conference > Ongoing**.
- 2 Select the conference of interest and click **Manage** .  
The **Participants** list appears.
- 3 To view participants geographically, click .
- 4 Double-click on the participant of interest.
- 5 Use these participant actions as needed. These actions are also available from the **View Participants Details** dialog box.

Command	Use this command to...
Remove 	Remove the selected participant from the Participants list at which time the participant can be scheduled for another conference.
Send Message 	Send a message to the selected participant's registered Polycom endpoint. The message appears briefly on the monitor for the selected video endpoint.


## View a Participant's Details During a Conference

You can view details for a participant's endpoint while it is in conference.

### To view a participant's endpoint details

- 1 Go to **Conference > Ongoing**.
- 2 Select the conference of interest and click **Manage** .

The **Participants** list appears.

- 3 To view participants geographically, click .
- 4 Double-click on the participant of interest.



The **View Participant Details** dialog box appears with the **Call Properties** displayed. It includes the **Near End** and **Far End** video, the Participant's name, **Status, Errors, Warnings, Endpoint Type, Address, Access, and Bit Rate**.

It also includes a list of **Participant Actions**. For more information about these actions, see "[Manage a Participant's Endpoint During a Conference](#)" on page 34.

- 5 To view additional participant details, change the selection in the **Call Properties** drop-down menu.

— If you select **Device**, you'll see these participant details:

Setting	Description
Endpoint Type	Usually the endpoint model, such as Polycom HDX system.
IP Address	The IP address for the endpoint.
Site	The location of the endpoint as identified by its IP address and the subnet of the site.
Gatekeeper	The gatekeeper with which the endpoint is registered.
GDS	The Global Directory Service for the endpoint. Usually the Polycom Global Address Book.
Presence	Whether or not the endpoint is registered with a Presence service, so that its availability can be reported.
Device Managed	Whether or not the endpoint is registered with a Provisioning service, so that it can be configured automatically.

Setting	Description
ISDN Line Status	<p>The status of the ISDN line. Possible values include:</p> <ul style="list-style-type: none"> <li>Operational </li> <li>Non-operations </li> </ul> <p>This field is blank for the following device types: <b>PVX, MGC, RMX, GW/MCU, Other, and TANDBERG.</b></p>
Alias Type	<p>If the endpoint has an alias designation, the type of alias. Possible types include E.164, H.323 ID, URL, Transport Address, E-mail, Party Number, and Unknown.</p>
Alias Value	<p>Value for the alias type shown.</p>

— If you select **Call Details**, you'll see these participant details:


Setting	Description
Video Protocol	<p>The video connection protocol, both transmission (Tx) and reception (Rx), the endpoint is using. Possible values include:</p> <ul style="list-style-type: none"> <li>H.261 H.261 is an ITU standard designed for two-way communication over ISDN lines and supports data rates which are multiples of 64Kbit/s. H.261 supports CIF and QCIF resolutions.</li> <li>H.263 H.263 is based on H.261 with enhancements that improve video quality over modems. It supports CIF, QCIF, SQCIF, 4CIF and 16CIF resolutions.</li> <li>H.264</li> </ul>
Video Format	<p>The video format, both transmission (Tx) and reception (Rx), the endpoint is using.</p>
Video Rate	<p>The video bandwidth negotiated with the far site.</p>
Video Rate Used	<p>The actual video bandwidth used in the call to the far site.</p>
Video Frame Rate	<p>Specifies the frame rate to use.</p>
Audio Rate	<p>The audio bandwidth negotiated with the far site</p>
Audio Protocol	<p>The audio connection protocol, both transmission (Tx) and reception (Rx), the endpoint is using.</p>

— If you select **Call Quality of Service**, you'll see these standard service measurements: Total Packet Loss, % Packet Loss, Audio Packet Loss, Video Packet Loss, Audio Jitter, and Video Jitter.



## Terminate an Active Conference


### To terminate an active conference

- 1 Go to **Conference > Ongoing**.
- 2 Select the conference of interest and click **Terminate** .
- 3 Click **Terminate** to confirm the termination.

## Delete a Conference

You can delete future or past conferences. You cannot delete active conferences.

### To delete a conference

- 1 Go to **Conference > Future**.
- 2 To delete a past conference, select the appropriate filter (such as **Yesterday Plus**).
- 3 Select the conference of interest and click **Delete** .
- 4 If you select a recurring conference, a dialog box appears asking you if you want to delete just the conference you selected or all conferences in the series. Make the appropriate choice. Active conferences in the series cannot be deleted.
- 5 Click **Delete** to confirm the deletion.

The conference is deleted. For future conferences, the system emails the change to the conference owner and participants and releases the participant and room resources.



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# Advanced Scheduling Operations

This chapter describes how users with advanced scheduler permissions have more options when scheduling conferences using the Polycom® Converged Management Application™ (CMA™) system.

When scheduling conferences, users with advanced scheduler permissions can:

- [Edit Conference Settings](#)
- [Select a Bridge for a Conference](#)
- [Create a Cascaded Conference Across Multiple Bridges](#)

## Edit Conference Settings

If you have **Scheduler Permissions** and an **Advanced Scheduling level**, you can overwrite certain conference template settings as described here. However, be careful when doing so. If you have an environment with mixed MCU types (e.g., with both Polycom MGC and RMX systems), and the conference you schedule is hosted on a Polycom RMX system, some of the settings you specify here may be overridden by the RMX profile.




- A profile is a collection of advanced conference settings that reside on the MCU (Polycom MGC or RMX system). Only an RMX profile can override conference template settings. For more information about conference templates, profiles, and your conferencing configuration, contact your Polycom CMA system administrator.
- Two conferences scheduled with the same template may have different settings and behavior if they land on different types of MCUs.

You can edit conference settings only for scheduled conferences. You cannot edit conference settings for active conferences.

**To edit the conference settings**

- 1 On the conference scheduling page, as you are adding or editing a conference, click **Edit Conference Settings**.
- 2 As needed, configure these settings on the **Conference Settings** dialog box. The settings that you can edit may depend on the template selected.

Setting	Description
Conference Password	<p>By default, the system assigns an eight-digit <b>Conference Password</b> and provides this password to participants within the content of the conference notification email.</p> <p>You can change this password to another four- through eight-digit number.</p>
Enable Chairperson	<p>You can select a video chairperson to control the conference from his or her video endpoint system. The video chairperson must have a video endpoint system and Chairperson conferences require an MCU.</p> <p><b>Notes</b></p> <ul style="list-style-type: none"> <li>• If the conference template has the <b>Conference Requires Chairperson</b> parameter enabled, then <b>Enable Chairperson</b> is automatically selected and cannot be changed.</li> <li>• If a conference is scheduled on a Polycom RMX 2000/4000 system and the RMX profile has <b>Conference Requires Chairperson</b> selected but the template does not, and the conference is scheduled without a chairperson, then all users will remain in the waiting <b>room</b> and will not be able to join the conference.</li> <li>• Polycom RMX 1000 systems do not support the <b>Chairperson</b> feature.</li> </ul>
Chairperson Password	<p>If <b>Enable Chairperson</b> is selected, the system assigns an eight-digit <b>Chairperson Password</b> and provides this password to the video chairperson in a separate email.</p> <p>If <b>Enable Chairperson</b> is selected, the chairperson must enter this eight-digit password at his or her video endpoint to assume control of the conference.</p> <p>You can change this password to another four- through eight-digit number.</p>

Setting	Description
Dial Options	<p>You have three options:</p> <ul style="list-style-type: none"> <li>To create a conference for which the same dial-in information and a PIN code are assigned to all conference participants, use the <b>Dial-In</b> setting. This setting allows participants to dial in from an audio or video endpoint and connect to the same conference on the MCU.</li> <li>To dial out to all participants in the conference, use the <b>Dial-Out</b> setting.</li> <li>To allow participants both options, select <b>Dial-In+Dial-Out</b>.</li> </ul> <p><b>Note</b></p> <p>When you change a conference from <b>Dial-In</b> to <b>Dial In+Dial Out</b>, the selected resources remain set to <b>Dial-In</b>. You must change them manually.</p>
Always Use MCU	<p>This setting forces the conference to an MCU and prevents video endpoints from connecting to each other directly. This setting is automatically selected and cannot be changed when <b>Audio Only</b> is the conference type or when <b>Enable Chairperson</b> is selected.</p>
Video Mode	<p>Determines the initial layout on a video endpoint's monitor for a multipoint conference that requires an MCU. The options are:</p> <ul style="list-style-type: none"> <li><b>Switching.</b>  Indicates that the display changes each time the speaker changes, and everyone sees the current speaker.</li> <li><b>Continuous Presence.</b> Displays several panels on the monitor, each showing a different participant, and allows you to see all conference participants at once. You can select a specific layout, with a certain number of windows open.</li> <li><b>Automatic Layout</b> is a continuous presence layout, in which the number of participants determines the number of panels.</li> </ul>
Bit Rate	<p>Specifies the maximum connection speed for endpoints in the conference. Individual endpoints that specify a lower connection speed connect at that lower speed. Endpoints that specify a higher connection speed connect at the speed identified in the conference template.</p> <p>If you select a higher speed than an endpoint can support, the system reduces the speed that endpoint; however, the conference uses the default connection speed for endpoints that can match it. If you place the calls through an endpoint with an embedded MCU, the behavior depends on the capabilities of that endpoint.</p>

Setting	Description
<p>Bit Rate (continued)</p>	<p>When the dial speed is higher than the number of channels defined in the H.320 service for the endpoint, you receive a warning. To continue, lower the dial speed to less than or equal to the ISDN capability of the endpoint.</p> <p>Higher speed is important for high-quality video in a conference. Because higher speeds use greater bandwidth, scheduling a high-bandwidth conference may limit the number of conferences that you can reserve at one time.</p> <p><b>Note</b></p> <p>The bit rate can be set at the network level, the endpoint level, and the conference level. If there is a discrepancy between these bit rate settings, the system implements the lowest bit rate setting. The only exception, is that the bit rate in the RMX profile takes precedence over the bit rate in the conference settings.</p>

Setting	Description
People + Content	<p>Controls the ability for one endpoint to send two types of data—a data stream and a video stream—over the same bandwidth to display people and content. The receiving endpoint handles the two video streams differently and may display them on separate screens or through video switching mode.</p> <p>Endpoints that do not support the selected method connect with either video through IP or audio only through ISDN.</p> <p>Select from these available settings:</p> <ul style="list-style-type: none"> <li>• <b>None.</b> Select this option when dual data streams are not required.</li> <li>• <b>People +Content.</b> This enables the industry standard H.239 dual streams for endpoints that support H.239 or the Polycom proprietary People+Content dual streams for older Polycom endpoints without H.239 capabilities. The MCU requires that conferences with People + Content use a minimum speed of 192 K.</li> <li>• <b>People and Content VO.</b> This Polycom proprietary technology works with PictureTel endpoints. Select this option for older endpoints.</li> <li>• <b>Visual Concert PC.</b> Select this option for use with Polycom ViewStation MP/512/SP/323 endpoints.</li> <li>• <b>Visual Concert FX.</b> Select this option for use with Polycom ViewStation FX/EX and VS4000 endpoints.</li> <li>• <b>Duo Video.</b> This setting supports IP and ISDN and is available with TANDBERG endpoints, in which one part of the conference is set as the video conference and the other as the presentation conference.</li> </ul>

Setting	Description
T.120 Mode	<p>For MGC-hosted conferences only, selects the protocols and specifications for multipoint data communication.</p> <p>In the <b>T.120</b> menu, select the speed for the T.120 connection. See your IT department to determine the best combinations for your conferences. To disable the T.120 mode, select <b>None</b>.</p> <p>If you select T.120, these options may be available, according to the participant's endpoint and software:</p> <ul style="list-style-type: none"> <li>• <b>Application Sharing.</b> Allows two or more participants to work on the same document or application, even when only one participant has the application. In application sharing, one participant launches the application, and it runs simultaneously on all other computers.</li> <li>• <b>File Transfer.</b> Enables participants to send files to each other.</li> <li>• <b>Chat or Whiteboard.</b> Allows participants to communicate with each other by writing.</li> </ul> <p>In all of these modes, participants can view and hear each other.</p>

- 3 Continue adding or editing the conference, as described in [“Conference Management Operations”](#) on page 19.

## Select a Bridge for a Conference

By default when you add a conference, the Polycom CMA system will automatically select a bridge for the conference. However, if you have advanced scheduler permissions, you can select a specific bridge for your conferences.

### To select a single bridge for a conference

- 1 When you're adding or editing a conference, after you've made all of your other conference configuration choices, click **Bridge Selection** and select **Single Bridge**.

A bridge selection drop down list appears based on the template selection and conference settings.

- 2 From the MCU list, select a specific MCU to host the conference.
- 3 Continue adding or editing the conference, as described in [“Conference Management Operations”](#) on page 19.



## Create a Cascaded Conference Across Multiple Bridges

### To create a cascaded conference across multiple bridges

- 1 When you're adding or editing a conference, after you've made all of your other conference configuration choices, click **Bridge Selection** and select **Multi Bridge**.

The **Schedule** button changes to a **Manual Cascade** button and the **Recurrence** button is grayed out.

- 2 Click **Manual Cascade**.

The **People To Bridges** dialog box appears displaying the selected conference participants and their bridge assignments. Bridge assignments default to **Auto**. These system assignments are based on bridge capacity and/or least cost routing principles.

In the **Selected Bridge Availability** section, the system shows a count of the available ports on the available bridges for the specified time period. If the port count is within 5% of the maximum ports available, it is displayed in red.

- 3 To change a bridge assignment for a selected participant, click **Auto** and select a bridge from the pull-down menu.



A Polycom CMA system can only show port counts for conferences scheduled via the system. Ad hoc conferences are not included in the port count.

- 4 When you've completed all bridge assignments, click **Next**.

The **Bridge To Bridge Links** dialog box displays a graphical view of the selected bridges.



If an MCU does not show up in the **Bridge To Bridge Links** dialog box, then the MCU software does not support cascading.

- 5 To add a hub bridge (a bridge used to connect one bridge to another), from the **Available Bridges** window, select a bridge and click **Add Bridge**.
- 6 Specify bridge-to-bridge connections by selecting the bridges of interest and clicking **Add Link**.

The link is graphically represented by an arrow. The bridge at the base of the arrow dials to the bridge at the point of the arrow.



A Polycom RMX system cannot dial a Polycom MGC, so do not link from an RMX to an MGC.

**7** In the **Add Link** dialog box, select the **Link Type**.



- You can add links from a Polycom MGC MCU to a Polycom RMX MCU
- There is no support for ISDN cascaded links on RMX MCUs.

The lag time required to update cascaded links may cause more than one participant to hear the prompt about being the first person to join the conference.

**8** When finished, click **Schedule**.

The system verifies that it has a bridge with the capabilities and resources required for your conference. If it does, the **Conference Email Notification** page appears with a message indicating **Conference Successfully Scheduled**.

**9** To exit without sending an email to your participants, click **Skip Email**.

**10** To send an email notification to your participants, in the **Conference Email Notification** page:

- a** Copy additional people on the notification and/or add notes about the conference.
- b** Click **Send**.

Note that the **To**, **CC**, and **BCC** fields are ASCII only.

The system sends the conference notification email. The **Conference List - Schedule View** appears. Your conference appears in the **Conference List**.



- Recurring cascaded conferences are not allowed.
- You cannot change the conference layout of a cascaded conference.

# Conference and Participant Details

This chapter lists the conference and participant detail fields for reference. It includes these sections:

- [Conference Details](#)
- [Conference Features](#)
- [Bridge \(MCU\) Features](#)
- [Participants List](#)
- [Participant Details](#)
- [Participant Settings](#)

## Conference Image

The **Conference Image** section displays the selected participant's video. **Shuffle**  to shuffle to the next participant's video

## Conference Details

The **Conference Details** section has these fields.

Section	Description
Owner	The name of the person who created the conference. Schedulers only see the conferences they own. Not applicable for ad hoc conferences.
Start Date/Time	For a scheduled conference, the start date and time of the conference and the time difference between the local time and the standard time. For an unscheduled conference, the date and time the conference started.

Section	Description
Duration	For a scheduled conference, how long the conference is scheduled to last. For a completed conference, how long the conference actually lasted.
End Date/Time	The date and time the conference ended
Type	The type of conference. Possible values include: <ul style="list-style-type: none"> <li>• Audio</li> <li>• Audio-Video</li> </ul>
Status	The state of the conference. Possible values include: <ul style="list-style-type: none"> <li>• Active</li> <li>• Declined</li> <li>• Finished</li> <li>• Future</li> </ul>
Recurring	Whether or not the conference was scheduled as a recurring conference
Connection	Connection information about the conference. Possible values include: <ul style="list-style-type: none"> <li>• Multipoint</li> <li>• Point To Point</li> <li>• Gateway</li> </ul>
Bit Rate	The rate (in kbps) at which to transfer the conference audio or video data
Schedule ID	System-assigned ID used for troubleshooting
Conf Monitoring ID	System-assigned ID used for troubleshooting
Video Layout	The video layout for the conference: Continuous Presence or video Switching.
Video Format	For a conference hosted on an MCU, the video format of the conference data stream. Possible values include: <ul style="list-style-type: none"> <li>• Auto</li> <li>• CIF</li> <li>• QCIF</li> <li>• 4CIF</li> <li>• 16CIF</li> <li>• VGA</li> <li>• SVGA</li> <li>• XGA</li> <li>• NTSC</li> </ul>
Video Protocol	For a conference hosted on an MCU, the video protocol of the conference data stream. Possible values include: <ul style="list-style-type: none"> <li>• Auto</li> <li>• H.261</li> <li>• H.263</li> <li>• H.264</li> </ul>

Section	Description
Audio Algorithm	<p>For a conference hosted on an MCU, the audio compression ratio of the conference data stream. Possible values are:</p> <ul style="list-style-type: none"> <li>• AUTO</li> <li>• G.711</li> <li>• G.722</li> <li>• Siren 7 (16 kbps)</li> </ul>

## Conference Features

The **Conference Features** section has these fields.

Section	Description
Conference Password	The conference password, which is assigned either by the system or the scheduler.
Chairperson Required	<p>Indicates whether or not the conference requires a chairperson.</p> <p><b>Note</b> The RMX 1000 system does not support the <b>Chairperson</b> feature.</p>
Chairperson Password	The password the chairperson must enter to take control of the conference. Not applicable when no chairperson is designated.
Chairperson	The name of the chairperson. Not applicable when no chairperson is designated.
Lecture Mode	<p>The type of <b>Lecture Mode</b>, if any, that was selected when the conference was created. Possible values are None and Presentation.</p> <p><b>Note</b> The RMX 1000 system does not support <b>Lecture Mode</b>.</p>
Lecturer	The name of the lecturer. Not applicable when <b>Lecture Mode</b> is <b>None</b> .
Lecture View Switching	Indicates whether or not automatic switching between participants is enabled.
Dual Stream Mode	<p>Possible values are:</p> <ul style="list-style-type: none"> <li>• None</li> <li>• People+Content</li> <li>• Duo Video</li> <li>• Visual Concert PC</li> <li>• Visual Concert FX</li> <li>• Unknown</li> </ul>

Section	Description
T120 Rate	<p>Possible values are:</p> <ul style="list-style-type: none"> <li>• None</li> <li>• HMLP - Var</li> <li>• HMLP - 384</li> <li>• HMLP - 320</li> <li>• HMLP - 256</li> <li>• HMLP - 192</li> <li>• HMLP - 128</li> <li>• HMLP - 6.4</li> <li>• HMLP - 62.4</li> <li>• HMLP - 14.4</li> <li>• MLP - Var</li> <li>• MLP - 64.4</li> <li>• MLP - 62.4</li> <li>• MLP - 46.4</li> <li>• MLP - 40</li> <li>• MLP - 38.4</li> <li>• MLP - 32</li> <li>• MLP - 30.4</li> <li>• MLP - 24</li> <li>• MLP - 22.4</li> <li>• MLP - 16</li> <li>• MLP - 14.4</li> <li>• MLP - 6.4</li> <li>• MLP - 4</li> </ul>
End Time Alert	Whether or not the system alerts participants to the end of the conference by playing an end tone
Entry Tone	Whether or not an entry tone is played to all connected participants when a participant joins the conference
Exit Tone	Whether or not an exit tone is played to all connected participants when a participant disconnects from the conference

## Bridge (MCU) Features

The **Bridge (MCU) Features** section, which applies only for conferences that use an MCU, has these fields.

Section	Description
MCU Name	The MCU device name hosting the conference. Not applicable when the conference is not being hosted on an MCU.
Numeric ID	The unique conference identifier assigned by the MCU
Entry Queue Access	<p>Whether or not the conference has an entry queue enabled</p> <p><b>Note</b></p> <p>The Polycom CMA system enables entry queues on a per MGC basis and all conferences on an entry queue enabled MGC will be scheduled with entry queue access.</p>

Section	Description
Meet Me per Conf	Whether or not the a conference is a Meet Me conference, for which a dial-in number is assigned, so that undefined participants can connect to the conference
Conference on Port	(MGC only) Indicates whether or not the MGC is set to Conference on Port, which conserves bandwidth and ports. In this case, all participants are on a single video port and use the same connection speed and video format.
Message Service Type	Displays the type of messages participants joining the conference hear. Possible values are: <ul style="list-style-type: none"> <li>• None</li> <li>• Welcome (No wait)</li> <li>• Attended (Wait)</li> <li>• IVR</li> </ul>
Message Service Name	Name on the MCU of the Message Service. So, for example, a service name IVR70 which provides the IVR service

## Participants List

The **Participants** section has these fields.

Section	Description
Name	The participant's name
Call Info	How the participant joined the call. Possible values include: <ul style="list-style-type: none"> <li>• Video Dial-Out</li> <li>• Audio Dial-In@ &lt;Address&gt;</li> <li>• Video Dial-In@ &lt;Address&gt;</li> <li>• In Person</li> <li>• Room Only</li> </ul>

## Participant Details

The **Participant Details** section has these fields.

Section	Description
Call Info	How the participant joined the call. Possible values include: <ul style="list-style-type: none"> <li>Video Dial-Out</li> <li>Audio Dial-In@ &lt;Address&gt;</li> <li>Video Dial-In@ &lt;Address&gt;</li> <li>In Person</li> <li>Room Only</li> </ul>
Video Protocol	For a conference hosted on an MCU, the video protocol of the conference data stream. Possible values include: <ul style="list-style-type: none"> <li>Auto</li> <li>H.261</li> <li>H.263</li> <li>H.264</li> </ul>
Video Format	For a conference hosted on an MCU, the video format of the conference data stream. Possible values include: <ul style="list-style-type: none"> <li>Auto</li> <li>CIF</li> <li>QCIF</li> <li>4CIF</li> <li>16CIF</li> <li>VGA</li> <li>SVGA</li> <li>XGA</li> <li>NTSC</li> </ul>
Audio Algorithm	For a conference hosted on an MCU, the audio compression ratio of the conference data stream. Possible values are: <ul style="list-style-type: none"> <li>Siren 7 (16 kbps)</li> <li>Siren 14 (24 kbps)</li> <li>Siren 14 (32 kbps)</li> <li>Siren 14 (48 kbps)</li> <li>AUTO</li> <li>G.711</li> <li>G.722</li> </ul>
Local Date/Time	The date and time the conference started in local time.
Call ID	System-assigned ID used for troubleshooting.
Callee Name	The names of the participants called
Callee Endpoint	The names of the endpoints for the called participants
Callee Site	The names of the sites for the called participants



Section	Description
Callee Endpoint Status	The state of the participant's connection. Possible states include: <ul style="list-style-type: none"> <li>• Connected</li> <li>• Disconnected</li> <li>• Help request</li> <li>• Updating</li> <li>• New dial-in participant</li> <li>• New dial-out participant</li> </ul>
Caller Name	The name of the participant who placed the call
Caller Endpoint	The name of the endpoint from which the participant placed the call
Caller Site	The name of the site from which the participant placed the call
Caller Endpoint Status	The state of the participant's connection. Possible states include: <ul style="list-style-type: none"> <li>• Connected</li> <li>• Disconnected</li> <li>• Help request</li> <li>• Updating</li> <li>• New dial-in participant</li> <li>• New dial-out participant</li> </ul>
Content	None
T120 Rate	Possible values include: <ul style="list-style-type: none"> <li>• None</li> <li>• HMLP - Var</li> <li>• HMLP - 384</li> <li>• HMLP - 320</li> <li>• HMLP - 256</li> <li>• HMLP - 192</li> <li>• HMLP - 128</li> <li>• HMLP - 6.4</li> <li>• HMLP - 62.4</li> <li>• HMLP - 14.4</li> <li>• MLP - Var</li> <li>• MLP - 64.4</li> <li>• MLP - 62.4</li> <li>• MLP - 46.4</li> <li>• MLP - 40</li> <li>• MLP - 38.4</li> <li>• MLP - 32</li> <li>• MLP - 30.4</li> <li>• MLP - 24</li> <li>• MLP - 22.4</li> <li>• MLP - 16</li> <li>• MLP - 14.4</li> <li>• MLP - 6.4</li> <li>• MLP - 4</li> </ul>

## Participant Settings

The **Participant Settings** dialog box has these fields.

Section	Description
Name	The participant's name.
Devices	The participant's managed endpoint(s) if available.
Email	The participant's email address (ASCII only) for participants or guests without managed endpoints.
Type	The type of participant. Possible values include: <ul style="list-style-type: none"> <li>• Domain User</li> <li>• Local User</li> <li>• Domain Resource (a room)</li> <li>• Local Resource (a room)</li> <li>• Guest</li> </ul>
How will this participant join the conference?	How the participant will join the conference. Possible values include: <ul style="list-style-type: none"> <li>• In Person (requires no dial settings)</li> <li>• Room Only</li> <li>• Audio Only (Dial in)</li> <li>• Use Video</li> </ul>
Bit Rate	The audio or video data transfer rate (in kbps) of the participant's endpoint.
Dial Options	Available only if the participant is joining via a video endpoint system. Possible values include: <ul style="list-style-type: none"> <li>• Dial-In</li> <li>• Dial-Out</li> </ul>
Dial Type	The protocol the audio or video endpoint system uses.

If you select a **Dial Option** of **Dial-Out** for a participant without a managed endpoint, the **Participant Settings** dialog box has these additional fields.

Section	Description
Country	(H.320 dial type only) The country to which the system will dial out to the participant
Area/City Code	(H.320 dial type only) The area code to which the system will dial out to the participant

---

Section	Description
Number	(H.323 and H.320 dial types) The participant's phone number
Use Modified Dial Number	(H.320 dial type only) Click this check box to add a specific prefix to the participant's phone number. The <b>Number</b> field becomes active
Number	(H.320 dial type only) The complete modified dial number as required to include PBX exit codes, dialing prefixes, or other installation-specific dial string requirements.



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