



Scheduler's Guide

10.1 | April 2017 | 3725-72103-001K1

Polycom[®] RealPresence[®] Resource Manager



Copyright© 2016, Polycom, Inc. All rights reserved. No part of this document may be reproduced, translated into another language or format, or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Polycom, Inc.

6001 America Center Drive
San Jose, CA 95002
USA

Trademarks Polycom®, the Polycom logo and the names and marks associated with Polycom products are trademarks and/or service marks of Polycom, Inc. and are registered and/or common law marks in the United States and various other countries.



All other trademarks are property of their respective owners. No portion hereof may be reproduced or transmitted in any form or by any means, for any purpose other than the recipient's personal use, without the express written permission of Polycom.

End User License Agreement By installing, copying, or otherwise using this product, you acknowledge that you have read, understand and agree to be bound by the terms and conditions of the End User License Agreement for this product. The EULA for this product is available on the Polycom Support page for the product.

Patent Information The accompanying product may be protected by one or more U.S. and foreign patents and/or pending patent applications held by Polycom, Inc.

Open Source Software Used in this Product This product may contain open source software. You may receive the open source software from Polycom up to three (3) years after the distribution date of the applicable product or software at a charge not greater than the cost to Polycom of shipping or distributing the software to you. To receive software information, as well as the open source software code used in this product, contact Polycom by email at OpenSourceVideo@polycom.com.

Disclaimer While Polycom uses reasonable efforts to include accurate and up-to-date information in this document, Polycom makes no warranties or representations as to its accuracy. Polycom assumes no liability or responsibility for any typographical or other errors or omissions in the content of this document.

Limitation of Liability Polycom and/or its respective suppliers make no representations about the suitability of the information contained in this document for any purpose. Information is provided "as is" without warranty of any kind and is subject to change without notice. The entire risk arising out of its use remains with the recipient. In no event shall Polycom and/or its respective suppliers be liable for any direct, consequential, incidental, special, punitive or other damages whatsoever (including without limitation, damages for loss of business profits, business interruption, or loss of business information), even if Polycom has been advised of the possibility of such damages.

Customer Feedback We are striving to improve our documentation quality and we appreciate your feedback. Email your opinions and comments to DocumentationFeedback@polycom.com.

Polycom Support Visit the [Polycom Support Center](#) for End User License Agreements, software downloads, product documents, product licenses, troubleshooting tips, service requests, and more.

Contents

Web Scheduler Guide	5
Conference Scheduling Overview	6
Getting Around	6
Log into the System	6
Field Input Requirements	7
Filter and Search a List	7
Log Out of the System	8
Conference Scheduler Roles	8
Scheduling Participants	9
Scheduling Bridges and DMA Pool Orders	10
Conference Templates	10
MCU Selection	10
Bridge Scheduling and Reassignment	10
DMA Pool Orders	11
Room ID Numbers	11
Limitations When Scheduling a Conference on a DMA Pool Order	11
Recurring Conferences	11
Anytime Conferences	12
Managing the Guest Book and Favorites Lists	13
Managing the Guest Book	13
View the Guest Book	13
Add a Guest to the System Guest Book	14
Edit a Guest in the System Guest Book	16
Delete a Guest from the System Guest Book	16
Managing Favorites	17
Add a Favorites List	17
Edit a Favorites List	17
Delete a Favorites List	18

Conference Scheduling	19
Schedule a Conference	19
Configure Advanced Settings	23
Schedule an Anytime Conference	24
Copy an Existing Conference	25
Edit a Future Conference	26
Edit a Participant's Settings	26
View Scheduling Information for a Conference	28
Managing Conferences and Participants	29
Working with Conferences	29
View All Conferences	29
Filter the Conference List	30
Delete a Conference	31
Export a List of Conferences	32
Managing Active Conferences	32
Manage an Active Conference	32
Write Conference Notes During a Conference	33
Add Additional Participants to an Active Conference	34
Add Guests to an Active Conference	34
Add a Room to an Active Conference	35
Terminate an Active Conference	35
Managing Participants within an Active Conference	36
Manage a Participant's Endpoint During a Conference	36
View a Participant's Details During a Conference	36
Conference and Participant Details Reference	39
Conference Image	39
Conference Details	39
Conference Features	41
Bridge (MCU) Features	42
Participants	43
Participant Details	43

Web Scheduler Guide

This book covers the tasks that a conference scheduler can perform.

[Conference Scheduling Overview](#)

[Managing the Guest Book and Favorites Lists](#)

[Conference Scheduling](#)

[Managing Conferences and Participants](#)

[Conference and Participant Details Reference](#)

Conference Scheduling Overview

This section provides an introduction to the Polycom® RealPresence® Resource Manager system video conference scheduling functionality and operations. It includes the following topics:

- [Getting Around](#)
- [Conference Scheduler Roles](#)
- [Scheduling Participants](#)
- [Scheduling Bridges and DMA Pool Orders](#)
- [Recurring Conferences](#)
- [Anytime Conferences](#)

Getting Around

The following section provides an overview into the basics of using the RealPresence Resource Manager and understanding the capabilities of system roles that can schedule and monitor conference. It includes the following sections:

- [Log into the System](#)
- [Field Input Requirements](#)
- [Filter and Search a List](#)
- [Log Out of the System](#)

Log into the System

To log into the RealPresence Resource Manager system web interface, you need the IP address or host name of the RealPresence Resource Manager system server and your username, password, and domain.

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

To log into the system:

- 1 Open a browser window and in the **Address** field enter the RealPresence Resource Manager system IP address or host name.
- 2 When the RealPresence Resource Manager system **Log In** screen appears, enter your **Username** and **Password**.
- 3 If necessary, select a different **Language**.
- 4 Click **Login**.


Field Input Requirements

While every effort was made to internationalize the RealPresence Resource Manager system, not all system fields accept Unicode entries. If you work in a language other than English, be aware that some RealPresence Resource Manager system fields may accept only ASCII or extended ASCII characters.

Filter and Search a List

In the RealPresence Resource Manager system, 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 click  and select **Status** as the filter, all the available types appear.

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

However, if the RealPresence Resource Manager system is integrated with an Active Directory, the RealPresence Resource Manager 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
Smithe
Bar
Smi
```

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

```
ObjectCategory
memberOf
DisplayName
GivenName
Sn
Cn
Samaccountname
groupType
distinguishedName
objectGuid
```

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

```
Sn
Givename
Mail
Ou
```

Objectguid
 Telephonenumber
 Cn
 Samaccountname
 Memberof
 Displayname
 Objectclass
 Title
 localityName
 department

Log Out of the System

You can log out of the system at any time.

To log out of the RealPresence Resource Manager system:

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

Conference Scheduler Roles

Users assigned a conference scheduling role can schedule conferences in a manner similar to other calendar applications.

In the **Scheduler** role, you can schedule conferences and view information about your ongoing, past, and future scheduled conferences. You can also add guests to and delete guests from the system **Guest Book**. You cannot view information for conferences that you did not schedule.

Users assigned the **Advanced Scheduler** role can also select bridges and templates and edit some conference settings.

Role	Supported Actions
View-Only Scheduler	View conferences that other users created
Scheduler	Add a new conference
	Copy a conference you created
	View details of a conference you created
	Delete a conference you created

Role	Supported Actions
Advanced Scheduler	Add a new conference
	Specify bridges and select templates for new conferences
	Copy a conference you created
	View details of a conference you created
	Edit some conference settings
	Delete a conference you created
Area Scheduler	Add a new conference
	Edit a future conference you created
	Copy a conference you created
	View details of a conference you created
	Delete a conference you created
Operator	Add a new conference
	Specify bridges and select templates for new conferences
	Copy any conference
	Edit any future conference
	Delete any future conference
	View any conference
	Manage any ongoing conference
	Terminate any ongoing conference
Area Operator	All area scheduler functions
	All advanced scheduler functions
	Manage any ongoing conference
	Terminate an ongoing conference

Scheduling Participants

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

For participants that have multiple endpoints registered with the RealPresence Resource Manager 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 RealPresence Resource Manager 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 at one time.

Scheduling Bridges and DMA Pool Orders

When you schedule a conference, you can select a single bridge or a RealPresence DMA pool order to host the conference, depending on the permissions that you have been given by the administrator.

Conference Templates

Users with Advanced Scheduler or Operator permissions can also specify a conference template to use.



Two conferences scheduled with the same template may have different settings and behavior if they are hosted on different types of MCUs.

When using conference templates, keep in mind:

- Conference templates provide default conference settings. When you select a different template, you are selecting the default conference settings for your conference.
- The **Default Template** and **Default Audio Template** are available to all users who can schedule conferences. Other templates may also be available if they have been assigned to users with your role.
- The **Default Template** and **Default Audio Template** are stored in the system database and their names are not localized.

Conference templates for MCUs are stored in the RealPresence Resource Manager system, while conference templates for Pooled Conferences are defined in the RealPresence DMA system.

MCU Selection

Users with the Advanced Scheduler or Operator role can select a MCU 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, users should make their template selection 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 Scheduling and Reassignment

When you schedule a conference, the system automatically assigns the conference to a bridge unless a user with the default Advanced Scheduler or Operator role intercedes. If that bridge is down at the time the

system starts the conference, the RealPresence Resource Manager 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 message to all scheduled participants. This updated email includes a new dial-in number that dial-in participants must use to join the conference.
- 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 RealPresence Resource Manager 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.

DMA Pool Orders

Instead of selecting a bridge for your conference, you can select a RealPresence DMA pool order to manage your conference calls. This means that you do not need to track bridge availability or status of the conference resources manually. When you select a DMA pool order for your conference, your scheduled conference is hosted by the RealPresence DMA system. Using RealPresence DMA system defined priorities, the RealPresence DMA system can manage resource allocation between RealPresence Resource Manager system scheduled conferences and the RealPresence DMA-initiated ad hoc calls in real-time.

Room ID Numbers

When you schedule your conference on a DMA Pool Order, you can also create a room ID and dial-in number for participants to use. If you don't specify a room ID, the RealPresence DMA system will create one and the RealPresence Resource Manager associates it with the scheduled conference.

You can also use an existing VMR number that has been created on the RealPresence DMA system, as long as the VMR is not already scheduled for the time you need it. When you use an existing RealPresence DMA VMR, you can view the VMR settings on the RealPresence DMA VMR as "scheduled" (including the time), but until the conference is started other settings will not display such as dial-out participants or additional settings. These settings only get sent to the RealPresence DMA when the conference starts.

Limitations When Scheduling a Conference on a DMA Pool Order

When scheduling your conference on a DMA pool order, you are limited by the following:

- You must use a modified dialing number when scheduling an ISDN dial-out participant. Use the Use Modified Dial Number check box when scheduling an ISDN dial-out participant.

Recurring Conferences

When you schedule recurring conferences, the VMR associated with that recurring conference remains associated with that conference. You can use the VMR during its free time. For example, the VMR

associated with a recurring conference scheduled at 9 a.m. to 10. a.m. on Mondays. You can still use this VMR from the 10 .a.m. today to 9 a.m. tomorrow.

Anytime Conferences

Anytime conferences are scheduled RealPresence DMA conferences that do not have designated start and end times. These conferences are not recurring. To be able to add Anytime conferences, the RealPresence Resource Manager system must be connected to a Polycom RealPresence Distributed Media Application™ (DMA) system.

Anytime conferences do not have designated start and end times. Once an Anytime conference is configured, conferences can be started at any time by authorized participants. The following events occur when a new Anytime conference is added:

- A participant with scheduling permissions creates a new Anytime conference and the conference is assigned a virtual meeting room (VMR) number.
- The Owner passcode is automatically generated and required to launch an Anytime conference.
- All Anytime conference participants receive an email indicating the VMR number. The owner will also receive the owner passcode needed to launch the conference. Optionally, you can also include a conference passcode that participants are required to enter.
- When a participant dials the VMR number and enters the owner passcode, all dial-out participants are automatically called. If a participant dials into the VMR, they are not allowed into the conference or placed on hold until someone dials in and enters the owner passcode.
- The conference continues until all participants hang up the call.
- You can terminate an anytime conference from the RealPresence Resource Manager UI. There is no impact on the VMR.

Managing the Guest Book and Favorites Lists

The RealPresence Resource Manager system provides two ways that you can customize and expand the user directories. The system has a Guest Book and a Favorites List.

This section includes the following topics:

- [Managing the Guest Book](#)
- [Managing Favorites](#)

Managing the Guest Book

Users with the schedulers, operator, or administrator role have access to the Guest Book. The Guest Book provides a way to store conference participants that aren't managed by the RealPresence Resource Manager system.

The **Guest Book** is a local system directory that includes guest participants who were either explicitly added to the Guest Book or saved to the Guest Book while being added as conference participants.

Guest book entries are static and are not imported through the dynamically updated enterprise directory nor included in the system **Global Address Book**. The **Guest Book** is limited to 500 entries.

Users with the schedulers, operator, or administrator role have access to the Guest Book. The Guest Book provides a way to store conference participants that aren't managed by the RealPresence Resource Manager system.

This section includes these topics:


- [View the Guest Book](#)
- [Add a Guest to the System Guest Book](#)
- [Edit a Guest in the System Guest Book](#)
- [Delete a Guest from the System Guest Book](#)

View the Guest Book

By default, both system and area schedulers, operator, and administrators have access to the Guest Book.

When areas are enabled for your system, you can view only those guests who have been assigned to an area that you manage. If you can manage more than one area, you can view users from all areas that you manage.

To view the Guest Book:

- 1 Go to **User > Guest Book**.
- 2 Click  to filter the guest book by entering the first or the last name of the guest you want to find.

- 3 Click **Search** to get a filtered list. Or click **Reset** to clear your inputs.

The **Guest Book** pages includes a list of guest book entries that includes these fields.

Field	Description
Guest Name	The guest's first and last name.
E-mail	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 H.323 (IP), SIP (IP), or H.320 (ISDN) endpoint.
Selected Area	This field is available when areas are enabled and the user can manage more than one area.

Add a Guest to the System Guest Book

You can add a guest to the guest book.

You can add as many as 500 guests, but each guest must be unique. The RealPresence Resource Manager validates each guest for a unique H.323 ID, E.164 number, IP address, and so on. The RealPresence Resource Manager verifies that the guest does not already exist in the guest book or as a user-associated endpoint.

To add a guest to the system Guest Book:

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

Field	Description
First Name	The guest's first name.
Last Name	The guest's last name.
Email	The guest's email address. The system only validates the structure of the email address.
Location	The location of the guest's endpoint system. This is a free-form field that the system does not validate.

Field	Description
Dial Type	Specify the protocol that the guest's endpoint supports: H.323 (IP), SIP (IP), or H.320 (ISDN). This selection will determine what other sections of the Add New Guest dialog you will need to complete.
Join Mode	Specify whether the guest's endpoint is an audio or video endpoint. Note A guest may have multiple endpoints. Create a separate Guest Book entry for each endpoint.
Dial Options	Specify whether the guest will dial into conferences, or require that the system dial out to the guest. Note To support both options, create a separate Guest Book entry for each.
Assigned Area	This field is available when areas are enabled and the user can manage more than one area.

3 If the guest has an H.323 (IP) endpoint, configure these settings:

Field	Description
Number and Number Type	The specific dial string for the guest, and the format of the number that the MCU must resolve to contact the guest. This may be an IP address, E.164 address, H.323, or Annex-O. For Annex-O dialing, in the Number field enter the <code>H.323.alias@IP</code> , for example: <ul style="list-style-type: none"> • 1001@11.12.13.14 • 1001@domain.com • username@domain.com • username@11.12.13.14 Notes <ul style="list-style-type: none"> • Polycom endpoints must register with a gatekeeper before they will attempt an Annex-O call. • You can enter a dial string for another MCU as a guest. If so, you may need to specify the conference ID in the Extension field also.
Extension	Use this field to connect the conference to another conference on another MCU. In this field, specify the conference ID or passcode for the conference on the other MCU.
MCU Service	Choose from the list of MCU services defined on the MCUs with which the RealPresence Resource Manager system is registered. Leave this at Any Available Service unless you have specific knowledge of MCU services.

4 If the guest has a SIP (IP) endpoint, configure these settings:

Field	Description
Sip URI	The SPI URI the MCU must resolve to contact the guest.
MCU Service	Choose from the list of MCU services defined on the MCUs with which the RealPresence Resource Manager system is registered. Leave this at Any Available Service unless you have specific knowledge of MCU services.

5 If the guest has an H.320 (ISDN) endpoint, configure these settings:

Field	Description
Use Modified Dial Number	Select this option first (as needed) as it will determine the other fields you must configure.
Country	(Not available when Use Modified Dial Number is selected.) The country to which the system will dial out to the guest. Click Select to view a list of country codes.
Area/City Code	(Not available when Use Modified Dial Number is selected.) The area code to which the system will dial out to the guest.
Number	The participant's phone number.
Extension	Cannot be configured.
MCU Service	Choose from the list of MCU services defined on the MCUs with which the RealPresence Resource Manager system has registered. Leave this at Any Available Service unless you have specific knowledge of MCU services.


6 Click **OK**.

Edit a Guest in the System Guest Book

You can edit information associated with a guest in the system guest book.

If you edit a guest that is already scheduled for a future conference or participating in an ongoing conference, the changes you make will not be reflected in the conference.


To edit a guest in the system Guest Book:

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

Delete a Guest from the System Guest Book

You can delete a guest from the 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 . Click **OK** to confirm the deletion.

Managing Favorites

Users with the operator role or area operator role to create one or more **Favorites** list, which they can use to quickly select participants to participate in conferences.

Users with the operator or area operator roles with **Monitoring** permissions can view, add, edit, delete, or use **Favorites** lists and these **Favorites** lists cannot be shared with other operators.



This section includes the following tasks:

- [Add a Favorites List](#)
- [Edit a Favorites List](#)
- [Delete a Favorites List](#)

Add a Favorites List

You can create a new Favorites list.

To add a Favorites list:

- 1 Go to **Conference > Favorites**.
- 2 On the **Favorites** page, click .
- 3 Enter a unique name for the **Favorites List Name**.
- 4 Enter a description.
- 5 Click  and enter all or part of the person's last name or first name in the **Search Available Members** field and click **Search**.

The system searches the **Users** list (local and domain) for users who are associated with endpoints and who meet your search criteria. The results appear in the **Search Results** column.




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

- 6 Select the user(s) of interest from the list and move them to the **Favorite List Members** column.
- 7 Repeat step 5 and 6 until you've added the users of interest to your **Favorites** list and then click **OK**.
The new list appears in the **Favorites** page.

Edit a Favorites List

You can edit a Favorites list. You can rename it or remove or add users to the list.


To edit a Favorites list:

- 1 Go to **Conference > Favorites**.
- 2 Select the **Favorites** list of interest and click .
- 3 In the **Edit Favorites List** dialog, edit the **Favorites List Name** and **Description** fields as needed.
- 4 Remove or add users to the **Favorite List Members** column as needed and then click **OK**.

Delete a Favorites List

You can delete a Favorites list. When you delete a Favorites list, the users remain in the system but are not associated with the deleted Favorites list.

To delete a Favorites list:

- 1 Go to **Conference > Favorites**.
- 2 Select the **Favorites** list of interest and click .
- 3 Click **OK** to confirm the deletion.
The list is deleted from the system.

Conference Scheduling

This section describes the Polycom® RealPresence® Resource Manager system conference scheduling operations. It includes these topics:

- [Schedule a Conference](#)
- [Schedule an Anytime Conference](#)
- [Copy an Existing Conference](#)
- [Edit a Future Conference](#)
- [Edit a Participant's Settings](#)
- [View Scheduling Information for a Conference](#)



Since Area Schedulers can perform both basic and advanced tasks, any references in this section to the Scheduler role also applies to the Area Scheduler role.

Schedule a Conference

Users with the following default user roles are allowed to schedule conferences: scheduler, operator, area operator and area scheduler.

When you schedule a conference, you specify the time, location and the list of participants. Optionally, you can also assign conference roles to participants such as lecturer or conference chairperson. Users with advanced scheduler or operator permission can also select a specific bridge and configure conference settings.



When scheduling conferences, be aware that the time displayed in the lower left corner of the RealPresence Resource Manager system is associated with the time clock of the local PC. See [Edit System Time Settings](#) for how to view system time settings. You must have the administrator role to view it.



Using NTP server is mandatory to schedule a conference.


To schedule a conference:

- 1 Go to **Conference > Monitor View** and click **+**.
- 2 Click **Participant** to add participants to the conference. You can add individual participants, conference rooms or guests to the conference.




- For participants who are associated with endpoints, the RealPresence Resource Manager system schedules their availability according to the endpoint's availability.
- For participants with multiple endpoints, 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.

3 To add a participant:

- Select **Add Participant**.
- Click  and type all or part of the participant (with wildcards) in either of the fields provided.
- Click **Search**.
- Select the participant you want from the search results.

4 Select **Add Guest**, select a guest from the list.

You can also click  to filter the list by entering the last or the first name of the guest you want.

If you want to add a new guest to the guest book, click **Add Guest** button. After you have added the new guest to the guest book, you can add that guest to the conference from the list. You must be an Advanced Scheduler or an Operator to add a new guest to the guest book.

5 To add a room:

- Select **Add Room**.
- Select a site from the **Search for Rooms at a Site** drop-down list.
- Select a room from the list of rooms associated with the site you selected.

6 When finished adding participants, rooms or guests, click **Close**.

7 Enter a new **Conference Name** or accept the system-generated name.

8 Use the **Bridge Selection** drop-down list to select a bridge or RealPresence DMA pool order for the conference.

Only users with the Advanced Scheduler or Operator role can select a bridge. RealPresence DMA pool orders are only available when your system is integrated with a RealPresence DMA system.

9 Select **Start Time**, **Duration**, and **End Time** for the conference for the conference.

10 If you want to make the conference recurring:

- Click **Recurrence** and in the **Appointment Recurrence** dialog, 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.

- Click **OK**.

11 Assign roles to participants. If the conference type and template support conference roles, you can associate conference roles with participants.

- Expand the **Role Settings** area.
- Use the drop-down lists to select **Lecturer**, **Video Chairperson**, or **Owner**. You must first add participants before assigning them a role.

Role	Description
Owner	Required for an Anytime conference. The owner is the participant who dials into the conference and enters a passcode to start the conference.
Video Chairperson	Video Chairperson: 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.
Chairperson Passcode	If you enable Enable Chairperson passcode , the system assigns a Chairperson Passcode and provides this password to the video chairperson in a separate email. When enabled for a conference, the chairperson must enter this password at his or the video endpoint to assume control of the conference. The length of the password is specified in the Conference and chairperson passcode length drop down list on the Conference Settings page.
Lecturer	Designates the participant as the main participant in the conference. If you designate a lecturer for a conference, that participant will not be muted if the video operator mutes all.

12 To modify conference settings, expand the **Conference Settings** area.

Only users with the **Advanced Scheduler** or **Operator** role can modify conference settings.

Setting	Description	Available for MCU or RealPresence DMA Pool Order Conference?
Conference Type	Select Video or Audio Only . Video conferences can include audio participants. If you choose an audio-only conference, video participants can only participate on audio channels only and no video will be displayed.	MCU conferences only
Conference ID	By default, the system assigns a Conference ID . You can change this ID to permit integration with third-party scheduling tools. This identifier must be 8 or less numeric digits. Note that the RealPresence Resource Manager system compares the Conference ID to its database to verify that it is unique. If it is not unique, you will be prompted to enter a new Conference ID . Not available for Pooled Conferences.	MCU conferences only.
Room ID	By default, the RealPresence DMA will assign VMR as a Room ID . You can leave this field empty.	RealPresence DMA Pool Order conferences only
Conference Passcode	By default, the system assigns an 15-digit Conference Passcode and provides this passcode to participants within the content of the conference notification email. You can change this passcode to another 4-digit through 16-digit number.	MCU conferences and RealPresence DMA Pool Order conferences.

Setting	Description	Available for MCU or RealPresence DMA Pool Order Conference?
Conference Template	The available conference templates are automatically filtered according to the Conference Mode you select and listed in alphabetical/numerical order. When choosing a template for a RealPresence DMA pool order conference, the template list is ordered by the priority that was defined for the template in the RealPresence DMA system.	MCU conferences and RealPresence DMA Pool Order conferences.
Billing Code	Billing code is listed if areas are enabled and billing codes have been assigned to the area. If areas are enabled and a billing code is not assigned, the call detail report will list the billing code as None .	MCU conferences and RealPresence DMA Pool Order conferences.
Conference Mode	<p>All: Supports all conferences.</p> <p>Video Switching (VSW): Enables a special conferencing mode that provides HD video while using MCU resources more efficiently. All participants see the current speaker full screen (the current speaker sees the previous speaker). If video switching mode is enabled:</p> <ul style="list-style-type: none"> ▲ The minimum line rate available is 768 kbps (except for SD resolution, available only on v7 and newer Polycom MCUs with MPM+ or MPMx cards). • All endpoints must connect at the same line rate, and those that don't support the specified line rate are connected in voice-only mode. ▲ The video clarity, layout, and skins settings are not available. ▲ LPR is automatically turned off, but can be turned back on. <p>Continuous Presence (CP): The MCU selects the best video protocol, resolution, and frame rate for each endpoint according to its capabilities. Select this mode if scheduling only AVC endpoints. This is the only mode that supports the use of Polycom MCU profiles, third-party and legacy endpoints, and legacy RealPresence Collaboration Server (RMX) MCUs.</p> <p>SVC conferencing is only possible with Polycom MCUs and endpoints that support H.264 SVC.</p> <p>CP and SVC: The MCU selects the best video protocol, resolution, and frame rate for each endpoint according to its capabilities. Select this CP and SVC if scheduling both AVC and SVC endpoints.</p>	MCU Conferences only.

13 Click **Schedule Conference**.

14 Optionally, send a notification e-mail to participants.

- a To exit without sending an updated email message to your participants, click **Skip E-mail**.
- b To send an updated email to your participants, copy additional people on the notification and/or add notes about the conference.

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

- c Click **Send**.

Configure Advanced Settings

You can use the settings in the Advanced Settings section when you schedule a conference directly on an MCU instead of using a RealPresence DMA Pool order. In particular, advanced settings include parameters related to dialing options and configuration of a Polycom MGC system which include content options, as well specific bit rates or modes to use.

To configure advanced settings:

- 1 Expand the **Advance Settings** area.
- 2 Complete the following settings if you scheduled the conference on a Polycom MGC system.



Dial Options	<p>You have three options:</p> <ul style="list-style-type: none"> • To create a conference for which the same dial-in information and a PIN code are assigned to all conference participants, use the Dial-In setting. This setting enables participants to dial in from an audio or video endpoint and connect to the same conference on the MCU. • To dial out to all participants in the conference, use the Dial-Out setting. • To allow participants both options, select Dial-In+Dial-Out. <p>Note When you change a conference from Dial-In to Dial In+Dial Out, the selected resources remain set to Dial-In. You must change them manually. Not available for Pooled Conferences.</p>
Always Use MCU	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 Audio Only is the conference type or when Enable Chairperson is selected.
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"> • Switching. Indicates that the display changes each time the speaker changes, and everyone sees the current speaker. • Select a Frame Count, then select the specific layout for the frames. Available layouts are Continuous Presence settings.


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> <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>
T.120 Mode	<p>For MGC-hosted conferences only, selects the protocols and specifications for multipoint data communication.</p> <p>In the T.120 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 None.</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"> • Application Sharing. Enables 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. • File Transfer. Enables participants to send files to each other. • Chat or Whiteboard. Enables participants to communicate with each other by writing. <p>In all of these modes, participants can view and hear each other. Not available for Pooled Conferences.</p>

Schedule an Anytime Conference

if your RealPresence Resource Manager system is not integrated with a RealPresence DMA system, you cannot create an Anytime conference.

To schedule an Anytime conference:

- 1 Go to **Conference > Monitor View** and click .
- 2 Mark the **Anytime** check box which is to the right of the **Bridge Selection** drop-down list.
- 3 Click **Participants** to add participants to the conference.
 - a Select one of the following: **Add Participants**, or **Add Rooms** or **Add Guest**.
 - b Click  and type all or part of the participant or room name (with wildcards) in either of the fields provided. If searching for a room, use the Last Name or Room Name field.
 - c Click **Search**.

- d Select the participant or room you want from the search results.
- e To add a guest, select **Add Guest**, select a guest from the list and click **Add Guest**.
You can also filter the list by clicking  and entering the last or the first name of the guest you want.
- f Repeat these steps to add all required participants, rooms and guests and then click **Close**.
- 4 Enter a new Conference **Name** or accept the name that the system generated.
- 5 Use the **Bridge Selection** drop-down list to select a RealPresence DMA pool order for the conference.
- 6 Assign roles to participants. If the conference type and template support conference roles, you can associate conference roles with participants.
 - a Expand the **Roles Settings** area.
 - b Use the drop-down lists to select an **Owner** for the conference. You must first add participants before assigning them a role.


Role	Description
Owner	Required for an Anytime conference. The owner is the participant who dials into the conference and enters a passcode to start the conference.
Video Chairperson	Video Chairperson: 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.
Chairperson Passcode	A chairperson passcode is required for an Anytime conference. If you use a Chairperson passcode , the system assigns an 15-digit Chairperson Passcode and provides this password to the video chairperson in a separate email. When enabled for a conference, the chairperson must enter this 15-digit password at his or her video endpoint to assume control of the conference. You can change this password to another 4- through 16-digit number.
Lecturer	Designates the participant as the main participant in the conference. If you designate a lecturer for a conference, that participant will not be muted if the video operator mutes all.

- 7 Configure conference settings.
 - a Expand **Conference Settings**.
 - b Enter a conference passcode.
- 8 (Optional) Enter a **Room ID** to use. If this field is empty, RealPresence DMA will assign a VMR number.
- 9 To save the conference details, click **Save**.

Copy an Existing Conference

You can copy an existing conference to be used as a template for a new conference.

To copy a conference:

- 1 Go to **Conference > Monitor View**.
- 2 Select the conference of interest and click .
- 3 If you used a template other than the default when you created the conference, re-select the template.
- 4 Make the required changes to the conference date, participants, rooms, or other settings.
- 5 When finished, click **Schedule Conference**.



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 message to your participants, click **Skip E-mail**.

Edit a Future Conference

You can modify future conferences.

To edit a conference:

- 1 Go to **Conference > Monitor View**.
- 2 Click  to display future conferences.
- 3 Select the conference of interest and click .
- 4 If you select a recurring conference, a dialog 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.

- 5 Make the required changes to the conference date, participants, or other settings. For information on performing these tasks, see [Schedule a Conference](#).
- 6 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**.

- 7 To exit without sending an updated email message to your participants, click **Skip Email**.
- 8 To send an updated email to your participants, copy additional people on the notification and/or add notes about the conference.

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

- 9 Click **Send**.



The system sends the updated conference notification email message. The **Conference > Monitor View** appears. Your conference appears in the conference list.

Edit a Participant's Settings

You can edit conference participant settings after you have added them to a scheduled conference. If the conference is ongoing or already taken place, you can no longer edit the settings.

When you edit a participant's settings, those settings are valid only for the current conference that you are scheduling.

To edit a participant's settings:

- 1 Go to **Conference > Monitor View**.
- 2 Select a future conference of interest and click .
- 3 If you select a recurring conference, a dialog 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, click  beside a participant to open the **Edit Participant Settings** dialog.
- 5 In the **Edit Participant Settings** dialog, you can edit the participant settings as required:



Field	Description
Endpoints	Select an endpoint from the list.
How will this participant/room/guest join the conference?	Select In Person, Audio Only or Use Video .
Bit Rate	Select the Bit Rate at which the participant will join the conference. If you select Automatic, the participants bit rate will match the bit rate setting configured for the conference when it was scheduled.
Dial Options	Select either Dial-In or Dial-Out.
Dial Type	Select either H.323, SIP (SIP URI) or H.320. If no dial type is selected, it defaults to E.164.
If H.323 is selected for Dial Type:	Number: <ul style="list-style-type: none"> • Completed automatically and is read-only when the user is not a guest. • Modify the number type if necessary (IP address, E.164, H.323, Annex-0) • Add an extension if needed.
If SIP is selected for Dial Type:	<ul style="list-style-type: none"> • SIP URI: Completed automatically and is read-only when the user is not a guest. <p>Note When scheduling a SIP dial-out participant, you cannot schedule the participant as audio-only, encrypted, or use and extension.</p>
If ISDN is selected for Dial Type:	Enter the country code, area code, and phone number as necessary. Use a modified dial number if you need to dial a prefix or an outside line first. <p>Note You must use a modified dialing number if you are adding a dialout ISDN participant.</p>

Field	Description
Encryption	Indicate if this participant will join the conference under encryption. Remember that the MCU that hosts the conference must be configured to support encryption for this setting to take effect.
MCU Service:	Choose from the list of MCU services defined on the MCUs with which the RealPresence Resource Manager system is registered. Leave this at Any Available Service unless you have specific knowledge of MCU services.

6 When finished, click **OK**.

View Scheduling Information for a Conference

To view the scheduling information for a scheduled conference:

- 1 Go to **Conference > Monitor View**
- 2 From the  list, select the conference type of interest.
- 3 Select the conference to view from the list. Under **Conference Actions**, click .

The detailed information of this conference is displayed on the right.

For details on the type of information that is provided, refer to [Conference and Participant Details Reference](#).

Managing Conferences and Participants

This section describes how the Polycom RealPresence Resource Manager system manages conferences and conference participants. It includes these topics:

- [Working with Conferences](#)
- [Managing Active Conferences](#)
- [Managing Participants within an Active Conference](#)

Working with Conferences

You can view ongoing, past, and future conferences. You can view them in a list view or calendar view.

What you see depends on your user permissions. For example, if you have the view-only scheduler role, you cannot see the details of any conferences. Those with the operation role can view all conferences, including details.

For more information about roles, see [Conference Scheduler Roles](#).

This section includes the following topics:

- [View All Conferences](#)
- [Filter the Conference List](#)
- [Delete a Conference](#)
- [Export a List of Conferences](#)

View All Conferences



You can view both scheduled and ongoing conferences in the conference monitor view. You can toggle between a calendar and list view of all conferences.

When you view a conference, you can also view its status and any applicable alerts.

State	Description
Future Conference	Scheduled conference that has not yet started.
Completed Conference	A scheduled conference that occurred in the past.
Conference	A conference that is still /ongoing.

State	Description
Alerts Conference	<p>The bridge on which the /ongoing conference is being hosted has sent an alert. Examples of events that will trigger a bridge alert are:</p> <ul style="list-style-type: none"> • A participant is connected in secondary mode (audio only). • A conference is not yet full (for example, not all scheduled participants have joined the conference). <p>Note This state does not apply to conferences scheduled on a RealPresence DMA Pool Order.</p>
Conference End Warning	The conference is ending. For example, the conference is in its last five minutes unless someone extends it.

To view all conferences:


- 1 Go to **Conference > Monitor View**.
The **All Conferences** list displays a list of all conferences.
- 2 To view the list in calendar view, click .
The All Conferences page displays the conferences in a calendar view. Click **Day**, **Week**, or **Month** to change the calendar view.
- 3 To view the list in list view, click  again.

Filter the Conference List

You can filter the conference list to identify specific conferences you want to view. You must be in list view to filter the conference list. Filtering is not available in calendar view.

You can filter by a number of criteria including date, bridge, conference name and so on.

To filter the conference list:

- 1 Go to **Conference > Monitor View**.
The **All Conferences** list displays a list of all conferences.
- 2 Click  to filter the **All Conference** list.
The **Filter** dialog allows you to filter on the various criteria.
- 3 To filter by date:
 - a Click **Today** to filter on conferences happening today.
Optionally, you can change the date to filter on conferences for a specific day.
 - b Click **From** and **To** to filter on conferences within a range of dates. Select From and/or To and fill in the dates in the following format: YYYY-MM-DD or use the calendar tool to select a date.
- 4 To filter by Anytime conferences:
 - a Mark the **Anytime** check box to see all Anytime conferences.
 - b Optionally, use the date filtering options in combination with the check box.


- 5 To filter by status:
 - a Click **Status**.
 - b Click the text box and select a status from the context menu. Available statuses include: All, Future, History, and Ongoing.
 - c Optionally, use the date filtering options in combination with the check box.
- 6 To filter by bridge:
 - a Click **Bridge** and fill in a bridge name in the text box.
 - b Optionally, use the date filtering options in combination with the check box.
- 7 To filter by dial in number:
 - a Click **Dial in Number** and enter a dial in number in the text box.
- 8 To filter by creator:
 - a Click **Creator** and enter first name or last name in the text box.
- 9 To filter by conference owner:
 - a Click **Owner** and fill in the owner's name in the text box.
 - b Optionally, use the date filtering options in combination with the check box.
- 10 To filter by conference name:
 - a Click **Conference Name** and fill in the conference name in the text box.
 - b Optionally, use the date filtering options in combination with the check box.
- 11 To filter by endpoint name:
 - a Click **Endpoint Name** and fill in the conference name in the text box.
 - b Optionally, use the date filtering options in combination with the check box.
- 12 To filter by area:
 - a Click **Area** and fill in the area name in the text box.
 - b Optionally, use the date filtering options in combination with the check box.
- 13 When finished selecting criteria, click **Search**.

Only 1000 results can be returned when there are over 1000 results.

Delete a Conference

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

To delete a conference:

- 1 Go to **Conference > Monitor View**.
- 2 If necessary, filter the **All Conferences** list to include the conference you want to delete.
- 3 Select the conference of interest and click  .
- 4 If you select a recurring conference, a dialog appears asking you if you want to delete just the conference you selected or all conferences in the series. Make the appropriate choice. You cannot delete active conferences in the series.

- 5 Click **OK** 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.

Export a List of Conferences

Users with the Operator or Admin role can export a list of future conferences to a CSV file.

This option is only available when the list of conferences is filtered by Future.

To export a list of future conferences to a CSV file:

- 1 Go to **Conference > Monitor View**.
- 2 In the **All Conferences** list, be sure you filter the conference list to include only conferences that are scheduled in the future. You cannot export ongoing or past conferences.
- 3 Click .

Managing Active Conferences

Depending on your permissions, you can manage active conferences. For example, you can change the layout that participants see or add new participants.

You can also manage participants within an active conference, see [Managing Participants within an Active Conference](#).




RealPresence Immersive Studio systems display as expandable folders containing an icon for each of the codecs associated with the endpoint. You can only perform actions on the master codec. The master codec is indicated by name of the codec that ends with “_1”.

Manage an Active Conference

You can manage an active conference. Users with the operator or advanced scheduler role can make changes to the conference, such as add new participants, terminate the conference and so on.

To manage an active conference:

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

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

Section	Description
Status	The state of the participant's connection as identified by an icon. Hover over the icon to determine the status.
Type	The type of conference as identified by an icon. Hover over the icon to determine the type.
Name	The participant's name.
Endpoint	The name assigned to the participant's endpoint when it registered or was added to the system.
Access	The endpoint's network interface type. Possible values include: <ul style="list-style-type: none"> • H323_E164 • H323_ID • H323_ANNEX_O • ISDN • SIP
Address	The IP address, E614 number, H323 alias, or ISDN number of the participant's endpoint (if a dial-out), or SIP URI.
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"> • Audio or Video Dial-In • Audio or Video Dial-Out
Bridge	The MCU or RealPresence DMA pool order on which the participants call resides.

3 Use these actions under the **Conference Actions** drop-down list as needed:



Action	Use this action to...
Extend Duration	Extend the duration of an active conference.
Change Layout	For applicable endpoints. Change the default video layout for the conference display. <ul style="list-style-type: none"> • Switching. Indicates that the display changes each time the speaker changes, and everyone sees the current speaker. • Select a Frame Count, then select the specific layout for the frames. The available layouts are Continuous Presence settings.

4 Use these under the **Participant Actions** drop-down list as needed. See [Manage a Participant's Endpoint During a Conference](#) for details.

Write Conference Notes During a Conference

You can write conference notes when managing an ongoing conference.



To create a conference note:

- 1 Go to **Conference > Monitor View**.
- 2 Click  to filter the **All Conference** list to include the conference of interest.
- 3 From the list of **All Conferences**, select the conference of interest and click .
- 4 Expand the **Conference Notes** pane on the far right of the screen.
- 5 Click inside the text box to type a note.
If you type a note and then decide to undo your changes, click Escape to return to the original note.
- 6 Click **Save**.
The note becomes visible on any RealPresence Resource Manager browser session where other users are monitoring the same conference.

Add Additional Participants to an Active Conference

Users with the Operator role can add additional participants to an active conference.

To add participants from the local directory or enterprise directory:

- 1 Go to **Conference > Monitor View**.
- 2 Click  to filter the **All Conference** list to include the conference of interest.
- 3 From the list of **All Conferences**, select the conference of interest and click .
- 4 Go to **Conference Actions > Add Participant**.
- 5 If necessary, edit the new participants' settings.
- 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 Guests to an Active Conference


Users with the Operator role can add guests to an active conference.



If guests with the same dialing string and different extensions are added into a RealPresence DMA ongoing meeting, and then disconnected to the meeting. The guests may not reconnect to the meeting successfully. You need to remove the guests and add them back to the meeting manually.

To add participants from the Guest Book:



- 1 Go to **Conference > Monitor View**.
- 2 Click  to filter the **All Conference** list to include the conference of interest.
- 3 From the list of **All Conferences**, select the conference of interest and click .
- 4 Go to **Conference Actions > Add Participant**.
- 5 Click **Add Guest**.

- 6 From the **Guest Book** dialog, select the guest's name from the list.
You can also click  to filter the list by entering the last or first name of the guest you want to add.
The guest's name appears in the underlying **New Conference Participants** list.
- 7 Repeat step 6 to add all guest participants and then click **Close**.
- 8 To add new guest participants (participants not available from the local directory, enterprise directory, or **Guest Book**), do the following:
 - a Click the **Add Guest** radio button.
 - b Fill in the necessary information in the **Add Guest** dialog.
 - c Click **OK**.
- 9 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

You can add a room to an active conference.



To add a room to an active conference:

- 1 Go to **Conference > Monitor View**.
- 2 Click  to filter the **All Conference** list to include the conference you want to manage.
- 3 Select the conference of interest and click .
- 4 From the **Conference Actions** list, click **Add Room**.
- 5 From the **Add Room** dialog, select the site location of the room.
The list of conference rooms at the site appears.
- 6 Select the conference room of interest.
The conference room name appears in the underlying **New Conference Participants** list.
- 7 Click **Close**.
- 8 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.

Terminate an Active Conference

You can terminate an active conference.

To terminate an active conference:

- 1 Go to **Conference > Monitor View**.
- 2 Click  to filter the **All Conferences** list to include the conference you want to terminate.
- 3 Select the conference of interest and click .

- 4 Click **Terminate** to confirm the termination.

Managing Participants within an Active Conference

When monitoring a conference, you can manage the participants within the conference. You can manage their endpoints, and view the technical details of their connection.



Manage a Participant's Endpoint During a Conference

You can manage a participant's endpoint during a conference.



When using the commands on the manage page, these context-sensitive commands only appear when the participant's endpoint supports the action, and the commands work for rooms on the participant list as well.

To manage a participant's endpoint:

- 1 Go to **Conference > Monitor View**.
- 2 Click  to filter the **All Conferences** list to include the conference you want to manage.
- 3 Select the conference of interest and click  .
The **Participants** list appears.
- 4 Select a participant to manage.
- 5 From the **Participants Actions** list, select **View**.
The **View Participants Details** dialog displays
- 6 From the **View Participants Details** dialog, choose a manage option from the right section of the dialog.

The following actions are available:

Action	Use this action 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.
Save as Favorite	Function available when the selected participant has an associated endpoint to which the system can dial out. Save the selected participant to an existing Favorites List.



View a Participant's Details During a Conference

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



RealPresence Immersive Studio systems display as expandable folders containing an icon for each of the codecs associated with the endpoint. You can only perform actions on the master codec. The master codec is indicated by name of the codec that ends with “_1”.

To view a participant’s endpoint details:

- 1 Go to **Conference > Monitor View**.
- 2 Click  to filter the **All Conferences** list to include the conference you want to manage.
- 3 Select the conference of interest and click  .



The **Participants** list appears.

- 4 To view participants endpoint details, click **Participant Actions > View**.
- 5 Double-click on the participant of interest.

The **View Participant Details** dialog 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](#).

- 6 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.
ISDN Line Status	The status of the ISDN line. Possible values include: <ul style="list-style-type: none"> • Operational  • Non-operations  This field is blank for the following endpoint types: PVX , MGC , RMX , GW/MCU , Other , and TANDBERG .

Setting	Description
Alias Type	If the endpoint has an alias designation, the type of alias. Possible types include E.164, H.323 ID, URL, Transport Address, email, Party Number, and Unknown.
Alias Value	Value for the alias type shown.

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

Setting	Description
Video Protocol	The video connection protocol, both transmission (Tx) and reception (Rx), the endpoint is using. Possible values include: <ul style="list-style-type: none"> 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. 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. H.264
Video Format	The video format, both transmission (Tx) and reception (Rx), the endpoint is using.
Video Rate	The video bandwidth negotiated with the far site.
Video Rate Used	The actual video bandwidth used in the call to the far site.
Video Frame Rate	Specifies the frame rate to use.
Video FEC Errors	The number of Forward Error Correction (FEC) errors that have been corrected in the current call.
Cause Code	The cause code showing how the call ended.
Audio Rate	The audio bandwidth negotiated with the far site
Audio Protocol	The audio connection protocol, both transmission (Tx) and reception (Rx), the endpoint is using.

➤ 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.

Conference and Participant Details Reference

This section lists the conference and participant detail fields for reference. It includes the following topics:

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

Conference Image

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

Conference Details

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

Section	Description
Creator	Name of the person who created the conference. Not applicable for ad hoc conferences.
Owner	Name of the owner of the conference, if an owner is selected.
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.
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">• Audio• Audio-Video

Section	Description	
Status	The state of the conference. Possible values include: <ul style="list-style-type: none"> • Alerts • Declined • Finished • Future 	
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"> • Multipoint • Point To Point • Gateway • Embedded Multipoint 	
Bit Rate	The rate (in kbps) at which to transfer the conference audio or video data.	
Conf Monitoring ID	System-assigned ID used for troubleshooting.	
Media Type	Describes the media type used for the conference.	
Video Session Type	Type of video session: VSW (Video Switching) CP (Continuous Presence) SVC (Scalable Video Coding) only CP and SVC	
Video Layout	The video layout for the conference. For more information about layouts, see your MCU documentation. Possible values are: VIDEO_SWITCHING CP_1X1 CP_1X2 CP_2X1 CP_2X2 CP_3X3 CP_1AND5 CP_1AND7 CP_1X2VER CP_1X2HOR CP_1AND2HOR CP_1AND2VER CP_1AND3HOR CP_1AND3VER CP_1AND4VER CP_1AND4HOR CP_1AND8CENTRAL CP_1AND8UPPER CP_1AND2HORUPPER	CP_1AND3HORUPPER CP_1AND4HORUPPER CP_1AND8LOWER CP_4X4 CP_2AND8 CP_1AND12 CP_1X1QCIF CP_1X2FLEX CP_1AND2HORRFLEX CP_1AND2HORLFLEX CP_1AND2HORUPPERFLEX CP_1AND2HORUPPERLFLEX CP_2X2UPPERFLEX CP_2X2UPPERLFLEX CP_2X2DOWNRFLEX CP_2X2DOWNLFLEX CP_2X2RFLEX CP_2X2LFLEX CP_UNKNOWN

Section	Description
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"> • Automatic • CIF • QCIF • 4CIF • 16CIF • VGA • SVGA • XGA • NTSC
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"> • Auto • H.261 • H.263 • H.264
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"> • AUTO • G.711 • G.722 • Siren 7 (16 kbps)
Conference Area	Area or areas assigned to the selected conference owner.
Participant Areas	List of areas to which participants belong.

Conference Features

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

Section	Description
Conference Passcode	The conference passcode, which is assigned either by the system or the scheduler.
Chairperson Option	Indicates whether or not the conference requires a chairperson. <p>Note The RealPresence Collaboration Server (RMX) 1000 system does not support the Chairperson feature.</p>
Chairperson Passcode	The passcode 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.
Dial-in #	The number that can be used by participant not explicitly invited to the scheduled conference.

Section	Description
Lecture Mode	<p>The type of Lecture Mode, if any, that was selected when the conference was created. Possible values are None, Lecture, and Presentation.</p> <p>Note The RealPresence Collaboration Server (RMX) 1000 system does not support Lecture Mode.</p>
Lecturer	The name of the lecturer. Not applicable when Lecture Mode is None .
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"> • None • People+Content • Visual Concert PC • Visual Concert FX <ul style="list-style-type: none"> • Duo Video • Unknown
T120 Rate	<p>Possible values are:</p> <ul style="list-style-type: none"> • None • HMLP - Var • HMLP - 384 • HMLP - 320 • HMLP - 256 • HMLP - 192 • HMLP - 128 • HMLP - 6.4 • HMLP - 62.4 • HMLP - 14.4 • MLP - Var • MLP - 64.4 <ul style="list-style-type: none"> • MLP - 62.4 • MLP - 46.4 • MLP - 40 • MLP - 38.4 • MLP - 32 • MLP - 30.4 • MLP - 24 • MLP - 22.4 • MLP - 16 • MLP - 14.4 • MLP - 6.4 • MLP - 4
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	If the conference is hosted on an MCU, shows 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	Whether or not the conference has an entry queue enabled. Note The RealPresence Resource Manager 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.
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"> • None • Welcome (No wait) • Attended (Wait) • IVR
Message Service Name	Name on the MCU of the Message Service. So, for example, a service name IVR70 which provides the IVR service.

Participants

When you view a particular conference, the list of participants identifies users, rooms, and guests invited to participate. When viewing a conference, the list of participants identifies participants on a call.

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

Participant Details

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

Section	Description
Name	The participant's name.
Type	The type of conference connection. Possible values include: <ul style="list-style-type: none"> • Audio Only • Audio-Video • Other (for In Person and Room Only participants)
Endpoint Name	The name assigned to the participant's endpoint when added to the system.
Connection Status	The state of the participant's endpoint connection. Possible values include: <ul style="list-style-type: none"> • Connected • Connecting • Declined • Disconnected • Disconnecting • Error • Unknown
Interface Type	Possible values are: <ul style="list-style-type: none"> • H323 • ISDN • SIP • H323_E164 • H323_ANNEX_O • H323_ID
Address	Used to reach endpoints, such as IP address or E164 number.
Number	The IP address or phone number of the participant's endpoint (if a dial-out) or the participant's port address on the MCU (if a dial-in).
Bit Rate	The audio or video data transfer rate (in kbps) of the participant's endpoint.
Encryption	Encryption is either enabled (True) or disabled (False).
Area	Area or areas assigned to the participant.