

# Polycom® Unified Collaboration for IBM Lotus Sametime and IBM Lotus Notes

## Version 1.0 User Guide

Use this guide to start using Polycom's on demand audio and video collaboration solutions for IBM® Lotus® Sametime® and IBM Lotus Notes®.



### Polycom Unified Collaboration solution

Polycom's collaboration solution integrates audio and video conferencing with the instant messaging and Web conferencing capabilities of Lotus Sametime and Lotus Notes, so you can talk face-to-face in real-time with colleagues, customers, business partners, and suppliers around the world. From Sametime or Notes with their presence-based Contact lists, you can escalate a chat or invite contacts to an on-demand Polycom audio and video conference. Or you can launch Sametime Web Meeting to start an instant or scheduled web conference that includes audio and video conferencing.

### System requirements

Desktop requirements for the Polycom Unified Collaboration solution are simple: you'll need Lotus Sametime 7.5 or Lotus Notes 7.0.1 or greater and Polycom PVX™ version 8.0.3 for IBM with a USB web camera and microphone to provide the easiest-to-use, highest quality, desktop video conferencing experience around. Or you can connect to a meeting room that has a Polycom VSX™ system and bring even more to the conference.

For information on desktop requirements for Sametime, Notes, and/or the PVX application, see the release notes for the chosen product.

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### Setting up the Lotus Sametime client


A system administrator has integrated the Polycom Unified Collaboration solution with your Lotus Sametime installation, so you can start using this feature once you've configured the Sametime and PVX client applications on your desktop. All you have to do is add your SIP, H323 and/or PSTN/ISDN information.

To configure your Sametime client software:

1. From **Sametime**, select **File** ► **Preferences** ► **Telephony**. (Figure 1)
2. Verify that **Use Dynamic Conference** is enabled and the **Service Locations** is **Polycom Conferencing Service**.
3. In the **Conference Options** section, type your call back number into the **Number at which I will join the call** field. The following table provides the format for the different endpoint types:

# Type	# Format
SIP URI	sip:username@IPaddress (e.g., sip:bjones@192.168.23.10)
H323	H323:xxxx (extension) or H323:xxx.xxx.xxx.xxx (IP address)
PSTN	123456789
ISDN	ISDN:123456789

4. Click **Apply** to save the entry.

 To add additional call back numbers for yourself, select **Tools** ► **Call...** ► **Call me at** ► **Add number...** (Figure 2)

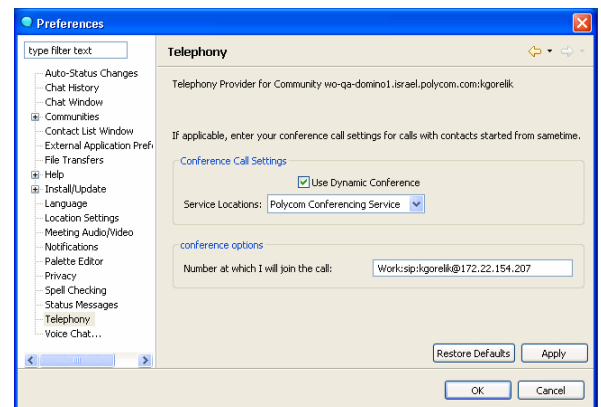


Figure 1

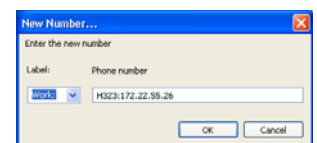


Figure 2

# Setting up the Polycom PVX client

To configure your Polycom PVX client:



To configure your Polycom PVX application for use in this solution, you must add your user name and the appropriate SIP or H.323 gatekeeper information. It is also recommended that you set PVX to **Auto-start** and **Auto-answer**.

1. Install the PVX 8.0.3 for IBM application as described in the PVX product documentation.
2. From the PVX interface, click **Setup**.

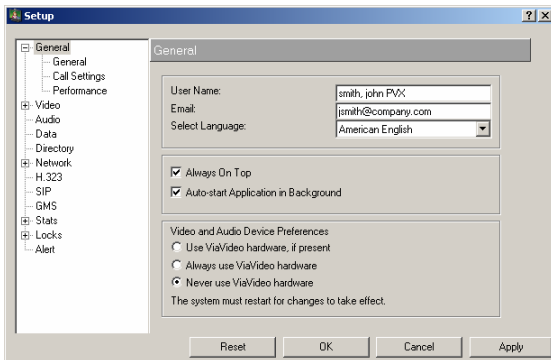


Figure 3

3. From the **General** screen (Figure 3):
  - a. Enable the **Auto-start Application in Background** check box.
  - b. If you want to prevent other applications from covering the main Polycom PVX window when you use it, select the **Always on Top** option.
  - c. Click the **Call Settings** tab.
  - d. Select the **Auto-Answer** check box.
  - e. Click **Apply**.

4. To register the PVX system with the SIP Server and define the required SIP settings:

- a. From the PVX interface, click **Setup**.
- b. Click the **SIP** tab. (Figure 4)
- c. Select **Enable SIP**.
- d. Configure the following settings:

Settings	Description
Enable SIP	Check this option
Transport Protocol	Select TCP.
User Name	Enter the SIP URI including SIP server address as defined by the system administrator, for example <code>austin1@&lt;SIP_Server_IP_address&gt;</code> . This name is required for authentication with the SIP server. Your system administrator can provide this information.
Password	Leave empty
Registrar Server	Enter the SIP Server IP address
Proxy Server	Enter SIP Server IP address

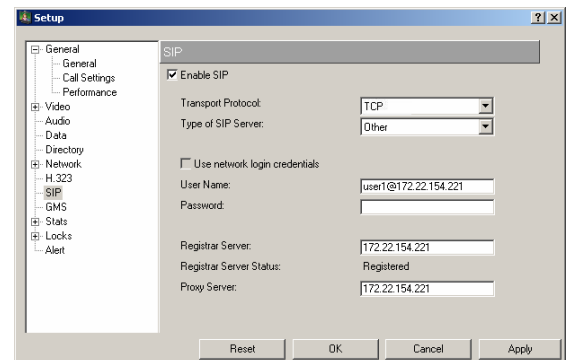


Figure 4

- e. Click **Apply**.

5. To register the PVX system with the Gatekeeper and define the required H323 settings:

- a. From the PVX interface, click **Setup**.
- b. Click the **H.323** tab. (Figure 5)
- c. Select **Specify** in the **Gatekeeper** section, which activates the gatekeeper.
- d. Click **Apply**.

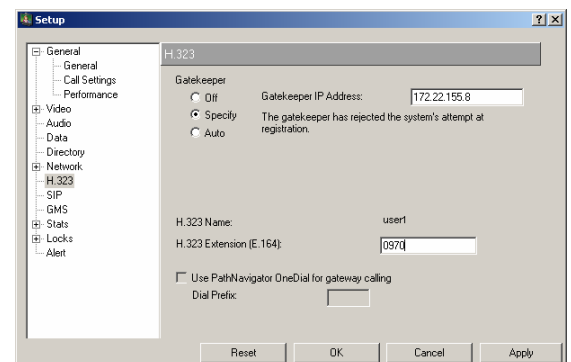


Figure 5

## Inviting Lotus Sametime contacts to join a Polycom conference



Because the Polycom Unified Collaboration solution does not change how Lotus Sametime works, the online help for Lotus Sametime Connect is still your best source of information if you have questions about the integrated applications.

To invite people from your Sametime Contact list to join an on-demand Polycom conference:

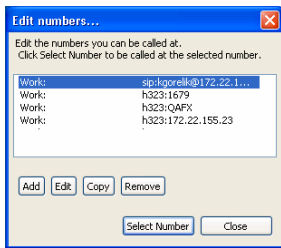


Figure 6

1. If necessary, edit your call back number by selecting **Tools ▶ Call... ▶ Call me at ▶ Edit numbers...**, adding or editing a number as needed, and clicking **Select Number**. (Figure 6)
2. Select one or more online contacts from your **Sametime Contacts** list.
3. Click **Start a Call**. (Figure 7)
4. When the **Start a Call** dialog box appears, enter the meeting purpose in the **Topic** field.
5. To add more people to the list of **Invitees** use the search function. To add off-line participants, click **Add New Person...**, type in the user's name and contact number, and click **OK**. (Figure 8)
6. When your list of **Invitees** is complete, click **Send**.

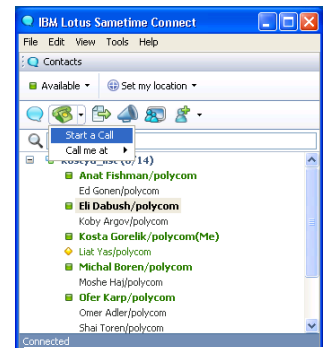


Figure 7

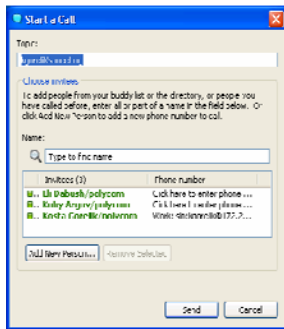


Figure 8

The system starts the conference and calls your invitees using the specified contact information. If they're online, they'll see an **Incoming call** dialog box offering them the choices **Join Call** or **Decline**.

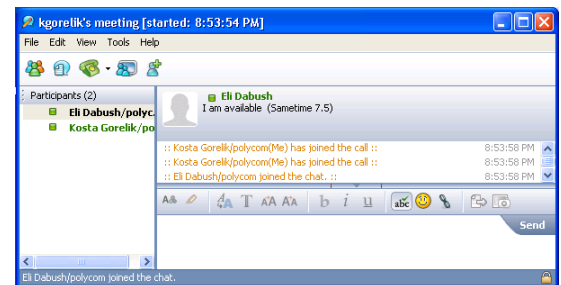


Figure 9

Once an invitee joins the call, the system calls you back and starts the conference. On your desktop you'll see the **Sametime** meeting window from which you can control the conference as you would any other meeting. (Figure 9) Meeting attendees appear in the PVX window.

If you're talking with just one person in a point-to-point conference, the **Sametime** window doesn't have all of the controls that you have with a multipoint conference. If you add more people to the conference, it will be promoted to a multipoint conference and you'll see these controls:

**Invite others**, **End Call**, **Mute**, and **Audio Control**.

## Finding conferencing information to provide guest users

You may need to provide guest users with a way to call in to join your conference.

To see the dial-in information for a Lotus Sametime conference

- ▶ From the Lotus Sametime meeting window, select **Audio Control ▶ Call-in Number**.

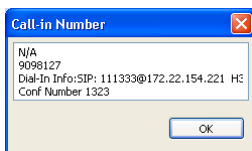



Figure 10




Call-in information is not available for on-demand point-to-point conferences, because these conferences are not set up on an MCU.

## Using Lotus Sametime 'Instant Meeting' to start a Polycom conference

There are two ways to use the Sametime **Instant Meeting** feature to start a Polycom conference: from your **Contact** list or from an IM Chat.

 Because the Polycom Unified Collaboration solution does not change how Lotus Sametime works, the online help for Lotus Sametime is still your best source of information if you have questions about the integrated applications.

To start an instant Polycom conference with Lotus Sametime:

1. From your **Contacts** list or from your **IM Chat** session, click  **Start Instant Meeting**. (Figure 11)
2. When the **Start an Instant Meeting** dialog box appears, enter information in the **Topic** field. (Figure 12)

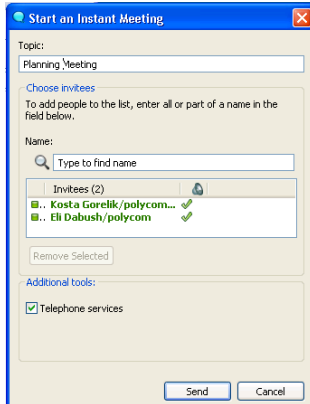


Figure 12

3. To add more people to the list of **Invitees** use the search function.
4. Enable the **Telephone services** selection and click **Send**.

The system notifies your invitees about the meeting. If they're online, they'll see a **Meeting Invitation** dialog box offering them the choices **Join the Meeting** or **Decline**.

At the same time, the **Meeting Room** page appears and the system begins by testing connectivity. When that's done, the main **Meeting Room** page appears. (Figure 13)

5. On the **Meeting Room** page, click **Join the Call** and from the **Join the Call** dialog box, choose the number at which the system should call you.

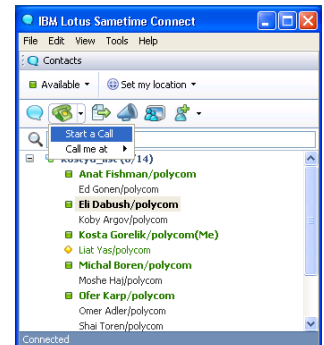


Figure 11

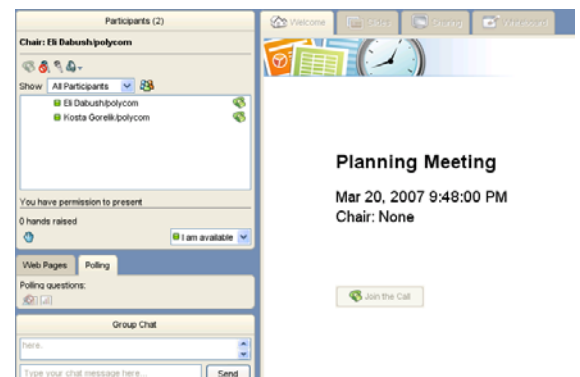






Figure 13

Once the conference has started, you can use the **Meeting Room** to control the meeting as you would any other **Meeting Room** meeting. You'll see these controls:

 **Invite others**,  **Mute my phone**,  **Unmute my phone**, and  **Audio controls** including **Show Call-in Number**, **Dial Out**, **Mute All**, **Unmute All**, **Lock the Call**, and **Hang Up My Phone**.

Meeting attendees appear in the PVX window.

## Finding conferencing information to provide guest users

You may need to provide guest users with a way to call in to join a Polycom conference.

To view the dial-in information for a Lotus Sametime Instant Meeting

- ▶ From the **Meeting Room** page, select  **Audio Control** ▶ **Call-in Number**.

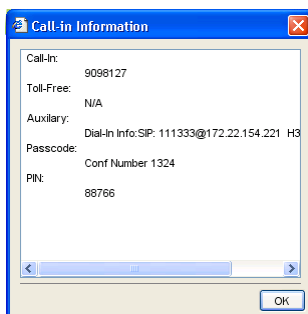



Figure 14

 Call-in information is not available for on-demand point-to-point conferences, because these conferences are not resident on an MCU.


The **Call-in Information** dialog box (Figure 14) includes the PSTN phone number (Toll-Free or Toll) that audio users can call to join the conference (if available) and the **Auxiliary** video conferencing number (SIP and/or H323) that users can call to join the conference. The dialog box also includes the **Passcode** users must enter before they can join the conference and the conference PIN. This is the information you provide to guest users.

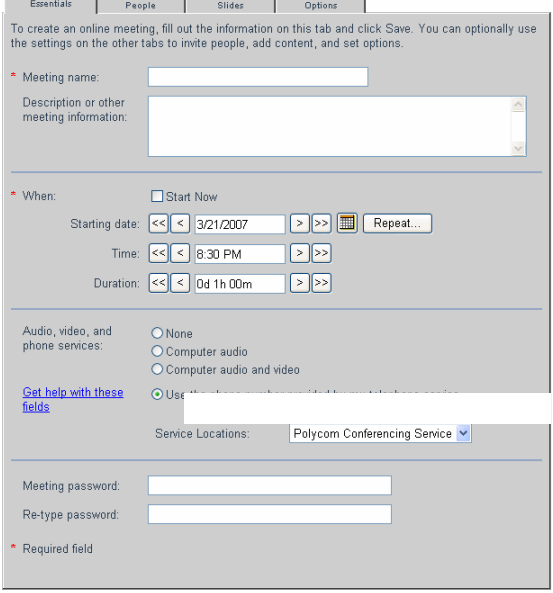
## Using the Lotus Sametime Meeting Center to schedule a Polycom conference



Because the Polycom Unified Collaboration solution does not change how Lotus Sametime works, the online help for Lotus Sametime is still your best source of information if you have questions about the integrated applications.

To schedule a conference from the Sametime Meeting Center:

1. Select **Tools** ► **Meetings** ► **Schedule Meeting**.
2. When the **Meeting Center Log In** page appears, type in your **User name** and **Password** and click **Log In**.
3. In the **Essentials** tab of the **New Meeting** page (Figure 15):
  - a. Enter the meeting purpose in the **Meeting name** field.
  - b. Enter the **Starting date** and **Time** for the meeting and the set the meeting **Duration** or check **Start Now** to have the meeting start immediately.
  - c. In the **Audio, video, and phone services** section, make sure the selection **Use the phone number provided by my telephone service** is enabled and the **Service Locations** is **Polycom Conferencing Service**.
4. In the **People** tab of the **New Meeting** page, determine if you wish to open the meeting to all users or restrict the meeting to specified users.  
 If you restrict the meeting to only specified users, those users will be required to enter a passcode to enter the meeting. The system saves this passcode in the **Telephony Conference Call** section of the **Meeting Details**.
5. When you've got all of the meeting details correct, click **Save** to schedule the meeting.



Essentials | People | Slides | Options

To create an online meeting, fill out the information on this tab and click Save. You can optionally use the settings on the other tabs to invite people, add content, and set options.

\* Meeting name:   
Description or other meeting information:

\* When:  Start Now  
Starting date: << < 3/21/2007 > >> Repeat...  
Time: << < 8:30 PM > >>  
Duration: << < 0d 1h 00m > >>

Audio, video, and phone services:  
 None  
 Computer audio  
 Computer audio and video  
 Use the phone number provided by my telephone service

Get help with these fields

Service Locations: Polycom Conferencing Service

Meeting password:   
Re-type password:

\* Required field

Save Cancel

Figure 15

## Finding conferencing information to provide guest users

You may need to provide guest users with a way to call in to join a Polycom conference.



Meeting Details: Planning Meeting  
The meeting is taking place now.  
[Attend the Meeting](#)

**Basic information**  
Meeting name: Planning Meeting  
Start time: Sun, 4/29/2007 10:37 AM  
Duration: 2d 8h 44m  
Has password?: No  
Recorded?: No  
Status: In Progress  
Chair: Michal Boren

**Meeting description**  
No description

**Telephony Conference Call**  
Toll Free Telephone Number:  
N/A  
Toll Telephone Number:  
9098126  
Alternate Telephone Number:  
Dial-In Info: SIP: 111333@172.22.154.221 H323: 230111333  
Service Location: Polycom Conferencing Service  
Passcode: Conf Number 1091

**Link to online meeting**  
Participants within the organization can attend using the following link(s):  
<http://wo-qa-domino1.israel.polycom.com/stconf.nsf/meeting/63573cde6af4bf7ac22572cc0029e9ff>

**Attachments**  
Slides and files added to the meeting:  
No attachments

Figure 16

To find call-in information for an instant or scheduled conference :

- From the **Meeting Room**, select  **Audio Control** ► **Call-in Number**.

The **Telephony Conference Call** section of the **Meeting Details** page (Figure 16) includes the PSTN phone number (Toll-Free or Toll) that audio users can call to join the conference and the **Auxiliary(Alternate Telephone)** number that video conferencing users can call to join the conference. The dialog box also includes the **Passcode Conf Number** users must enter before they can join the conference.

## Inviting Lotus Notes contacts to join a Polycom conference

To incorporate video conferencing into Lotus Notes, make sure `Click2DialEnabled=1` in your `NOTES.INI` file.

Because the Polycom Unified Collaboration solution does not change how Lotus Sametime works, the online help for Lotus Sametime is still your best source of information if you have questions about the integrated applications.

To invite people from Lotus Notes contact list to join an on-demand conference:

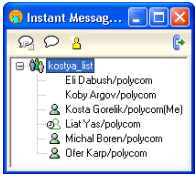


Figure 17

1. Select one or more Lotus Notes contacts from an email, your Instant Messaging Contact List, or your Address Book. (Figure 17)
2. Right-click and select **Call...** or click **Call**. The **Click-to-Call** page appears. (Figure 18)
3. To add more people to the call including off-line participants, click **Add users to the call**.

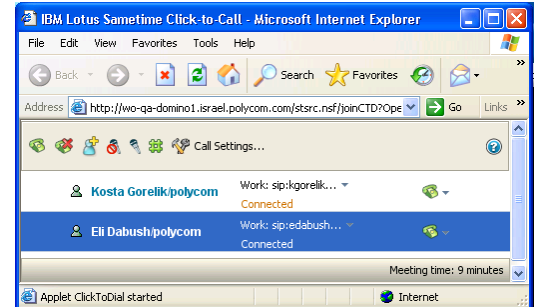


Figure 18

4. In the **Names** list of the **Names and Numbers** dialog box (Figure 19):
  - a. From the **Names** list, select the name of a person you want to include in the call.
  - b. Verify and as necessary add or edit the contact information for that person.
  - c. Click **Add to Call** to add the person to the current call.
  - d. To add a participant who's not in the **Names** list, click **New** and complete the **Add New User Name** process.
  - e. Repeat step 4 until you've added everyone you want to the call. Then click **Close**.



Figure 19

5. When your list of invitees is complete, click **Call all users in the list**. The system calls out to your invitees. If they're online, they'll see an **Incoming call** dialog box offering them the choices **Join Call** or **Decline**. Once an invitee joins the call, the system calls you back and starts the conference. You can use the **Click-to-Call** page to control the meeting. Controls include

**End Call**, **Mute All Users**, **Unmute All Users**, **Show call-in information**, **Call Settings**

## Finding conferencing information to provide guest users

You may need to provide guest users with a way to call in to join a Polycom conference.

To find call-in information for a Click-to-Call conference:

- ▶ From the **Click-to-Call** interface, select **Show call-in information**. You can provide this information to users that you want to dial into the call.

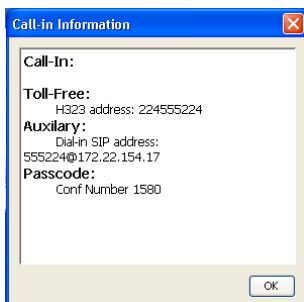


Figure 20

The **Call-in Information** dialog box (Figure 20) includes the PSTN phone number (Toll-Free or Toll) that audio users can call to join the conference and the **Auxiliary** number that video conferencing users can call to join the conference. The dialog box also includes the **Passcode** users must enter before they can join the conference.