

# Getting Started Guide

for the VSX Series  
Version 8.6 for SCCP

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# Contents

<b>Using the Remote Control .....</b>	<b>1</b>
<b>Calling and Answering.....</b>	<b>3</b>
Answering a Video Call .....	3
Placing a Video Call .....	3
Placing a Video Call on Hold.....	5
Resuming an On-hold Video Call.....	5
Transferring a Video Call to Another Site .....	5
Ending a Video Call .....	5
<b>Controlling What You See.....</b>	<b>6</b>
Selecting and Adjusting a Camera or Other Video Source.....	6
Setting and Using Camera Presets.....	7
Switching Between Full Screen Video and the Home Screen .....	8
Enabling Dual Monitor Emulation .....	9
Showing, Moving, and Turning Off the PIP .....	10
Specifying When to Display the PIP.....	11
Enabling Automatic Camera Tracking (PowerCam Plus Only) .....	12
<b>Controlling What You Hear.....</b>	<b>13</b>
Adjusting Volume.....	13
Muting the Microphone .....	13
<b>Showing Content .....</b>	<b>14</b>
Showing Content from a Computer .....	14
Showing Content from a Document Camera, VCR, or DVD Player .....	17
<b>Including Multiple Sites in Calls .....</b>	<b>18</b>
<b>Changing the Way Calls Are Answered.....</b>	<b>18</b>
Answering Calls Automatically.....	18
Muting Automatically Answered Calls .....	19
Forwarding Calls to Another System .....	19
<b>Scheduling Calls .....</b>	<b>19</b>
<b>Customizing Your Workspace.....</b>	<b>21</b>
Allowing the Far Site to Control Your Camera .....	21
Displaying the Far Site's Name When the Call Connects.....	21
Hearing Audio Confirmation When You Dial .....	22
Adjusting for Room Lighting .....	22
Changing the System Color Scheme .....	22
<b>Video Conferencing Tips.....</b>	<b>23</b>
Tips for Great Meetings.....	23
Tips for Great Video .....	23

Tips for Great Audio .....	23
Tips for Showing Content .....	24

# Getting Started Guide for the VSX Series

This guide includes overview information that you may find helpful when you're just starting to learn about video conferencing or when you have experience, but you need a quick refresher.



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VSX systems can be customized to show only those options used in your organization. Therefore, there may be options covered in this guide that you cannot access on your system. To find out more about these options, please talk to the administrator of your VSX system.

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This guide covers instructions for the following models.

<p>VSX set-top systems</p> 	<p>VSX component systems</p> 	<p>VSX 3000A executive desktop system</p> 
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## Using the Remote Control

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You use the remote control to place calls, adjust the volume, navigate screens, and select options.

If you need to enter text, you can press number buttons, using the text-entry method commonly used with cell phones. For example, to enter "b", press the number 2 button twice. Alternatively, you can press  **Keyboard** and use the onscreen keyboard to enter text.

## VSX Series Remote Control



# Calling and Answering


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## Answering a Video Call

The VSX system can answer incoming calls in one of these ways:

- ❑ The system prompts you to answer the calls manually.
- ❑ The system answers incoming calls automatically.

### To answer the call manually:

- Press  **Call** on the remote control.

If your system is set up to automatically answer calls, the call connects automatically.


## Placing a Video Call

You can use your system to place a video call in any of these ways:

- ❑ Entering a number
- ❑ Choosing a site from:
  - The Recent Calls list
  - The Contacts or Speed Dial list
  - The Directory

### Calling by Entering a Number

#### To place a call by entering a number:

1. In the dialing field, enter the number.
2. Press  **Call** on the remote control to place the call.


Call progress indicators appear on the screen to show that the call is in progress. When the indicators turn green, the call is connected.

### Calling from the Recent Calls List

You may be able to choose a number to call from a list of the sites you have called recently. The Recent Calls screen provides details of all incoming and outgoing calls, including the time of the calls.


#### To place a call from the Recent Calls screen:


1. Select **Recent Calls** from the Place a Call screen.
2. Scroll to the entry you want to call.

3. Press  **Call** to place the call.



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To see more details about a call listed on the Recent Calls screen, highlight the call and press  **Help** on the remote control.


You can sort the list by pressing the remote keys 1-9. Press  **Help** and select **Help** to view sorting options.

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### Calling from the Contacts or Speed Dial List

You may be able to access calling information for specific sites using the Speed Dial or Contacts list on the Place a Call screen.

#### To place a call using the Speed Dial or Contacts list:








1. Select **Speed Dial** or **Contacts** from the Place a Call screen, if necessary.
2. Scroll to the entry you want to call.
3. Press  **Call** to place the call.

### Calling from the Directory

The Directory contains information about other active sites that are registered with the Call Manager. Because these entries are stored on the Call Manager, you cannot edit them.

To view entries in the directory, you must search for the entry you want. You cannot view the entire list of entries in the directory.


#### To place a call from the directory:

1. Press  **Directory** on the remote control.
2. Find the entry to call. You can find an entry by:
  - Scrolling through the list of names using the  Up and  Down arrow buttons
  - Paging through the list of names using  Zoom In and  Zoom Out
  - Searching for a name by:
    - o Spelling the first or last name using the number buttons on the remote control
    - o Pressing  Keyboard to use the onscreen keyboard to spell the name
3. Press  **Call** to place the call.



## Placing a Video Call on Hold

### To place a video call on hold:

1. Press  **Call** on the remote control.
2. Select **Hold** from the Call Options menu.

The far site hears on-hold music and sees their local video.





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You can place and receive other video calls while a call is on hold.

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## Resuming an On-hold Video Call

### To resume an on-hold video call:

1. Press  **Call** on the remote control.
2. Select **Resume** from the Call Options menu.


## Transferring a Video Call to Another Site

### To transfer a video call to another site:

1. Press  **Call** on the remote control.
2. Select **Transfer** from the Call Options menu.
3. Enter the destination number for the transfer or choose a number from the Directory.
4. Press  **Call** on the remote control.

## Ending a Video Call

### To hang up from a call:

1. Press  **Hang Up** on the remote control.
2. If prompted, confirm that you want to disconnect from the far site(s).

## Controlling What You See

Adjusting your cameras lets you show conference participants what you want them to see. You can adjust cameras and other video sources before the meeting starts and while the meeting is in progress.

### Selecting and Adjusting a Camera or Other Video Source



You can use the remote control to select the main camera or any other near-site or far-site video sources, such as document cameras, computers, VCRs, or DVD players.



You can also use the remote control to adjust the main camera on VSX set-top and component systems. You may be able to adjust other auxiliary cameras or far-site cameras that support pan, tilt, and zoom movement.




You can adjust the far-site camera only if it is configured to allow you to control it.



#### To select a near-site or far-site camera or other video source:

1. If you are in a call, press  **Near** or  **Far** to select either near-site or far-site control. The icon on the screen indicates which you can control:

	<p>This onscreen icon indicates that you can control a near-site camera or video source</p>
	<p>This onscreen icon indicates that you can control a far-site camera or video source</p>

2. Press  **Camera** on the remote control. Then select the camera or other video source you want to use.

#### To adjust a camera using the remote control:

1. Press  **Near** or  **Far** to select either near-site or far-site control.
2. Press the arrow buttons on the remote control to move the camera up, down, to the left, or to the right.

3. Press  **Zoom** to zoom out or in.

## Setting and Using Camera Presets

Camera presets are stored camera positions that you can create ahead of time or during a call.



Presets allow you to:

- ❑ Automatically point a camera at pre-defined locations in a room.
- ❑ Select a video source such as a VCR or DVD player, a document camera, or an auxiliary camera.


If your system's camera supports electronic pan, tilt, and zoom movement, you can create up to 100 preset camera positions (0-99) for the near site. Each preset stores the camera number, its zoom level, and the direction it points (if appropriate). They remain in effect until you delete or change them.

If far-site camera control is allowed, you can create up to 16 presets (0-15) for the far-site camera. These presets are saved only for the duration of the call. You may also be able to use presets that were created at the far site to control the far-site camera.

### To move the camera to a preset:





1. If a call is connected, press  **Near** or  **Far**, then choose a near-site or far-site camera.
2. Press a number on the remote control.

### To view your near-site presets:

- Press  **Preset** on the remote control.




Icons for presets 0-9 are shown on the screen. The colored icons indicate stored camera positions, and the gray icons indicate available presets.

### To store a preset:

1. If you are in a call, press  **Near** or  **Far** then choose a near-site or far-site camera or other video source.
2. If you selected a camera that supports electronic pan, tilt, and zoom, you can adjust the camera's position:
  - Press the arrow buttons on the remote control to move the camera up, down, to the left, or to the right.
  - Press  **Zoom** to zoom the camera out or in.
3. Press  **Preset** on the remote control.
4. Press and hold a number to store the preset position. To store a double-digit preset, press the first digit quickly and hold the second number down. Any existing preset stored at the number you enter is replaced.

The system uses preset 0 as the default camera position.

**To delete all presets:**

1. If a call is connected, press  **Near** to choose a near-site video source.
2. Press  **Preset** on the remote control.
3. Press  **Delete** to delete all presets.



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You cannot delete just one preset. Instead, override an existing preset with the new camera position.

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## Switching Between Full Screen Video and the Home Screen

When the call connects, the system automatically shows the video in the whole screen. You can switch back to the home screen during a call, for example, if you need to adjust a user setting, and your system is configured to allow you to do so.




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To learn about adjusting user settings, see *Customizing Your Workspace* on page 21.

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**To see the video in the full screen:**

- Press  **Near** on the remote control.




**To see the home screen:**

- Press  **Home** on the remote control.

## Enabling Dual Monitor Emulation


Depending on your system configuration, you may be able to set your system for Dual Monitor Emulation (also called split-screen viewing). With Dual Monitor Emulation, you can see both the near and far sites on one monitor.

### To enable Dual Monitor Emulation:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Select  **Next** to see more settings.
4. Scroll to **Dual Monitor Emulation** and press  on the remote control to enable the option.
5. Press  **Home** to save your change and return to the home screen.




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There are several different views available with Dual Monitor Emulation. To change the view, press  **PIP** on the remote control.

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During calls using Dual Monitor Emulation without content, you can press the PIP button on the remote control to scroll through the following screen layouts:



1. Near and far sites, same size, side by side



2. Far site big, near site small



3. Near site big, far site small



4. Near site, full screen



5. Far site, full screen




The last layout viewed is used for the next call.

## Showing, Moving, and Turning Off the PIP




Your system may be configured to display a Picture-in-Picture (PIP) window. During a call on a single-monitor system, the PIP displays what your main camera is sending to the far site. If the far site shows any type of content, the content appears in the main part of the screen, and the PIP changes to show the people at the far site.

During a call on a dual-monitor system, what you see on each monitor and in the PIP depends on how the VSX system has been configured.

**To show, move, or turn off the PIP during a call:**

- ❑ Press  **PIP** on the remote control to display the PIP on screen.
- ❑ While the PIP has a yellow border, press  **PIP** repeatedly to move it to different corners of the screen.
- ❑ After a brief pause, the PIP border turns blue. Then, press  **PIP** to turn the PIP off.



**To swap the views shown in the PIP and the main screen:**


1. If the PIP is not showing, press  **PIP** on the remote control to display the PIP on screen.
2. Press  **Camera** and select the  **Swap PIP** icon.


## Specifying When to Display the PIP

Your system may be configured with specific default behavior for the PIP in calls. Depending on your system configuration, you can show, move, or hide the PIP as needed after a call connects.

**To specify when to display the PIP:**

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Select  **Next** to see more settings.
4. Scroll to **PIP**, press  , and select one of these settings:

Select this setting...	To show the PIP...
<b>Camera</b>	When you press any of the camera control buttons.
<b>Auto</b>	On connection and when you pick up the remote control.
<b>On</b>	On connection and during the call.
<b>Off</b>	Only when you press  <b>PIP</b> on the remote control.

5. Press  **Home** to save your change and return to the home screen.

## Enabling Automatic Camera Tracking (PowerCam Plus Only)

If you are using a VSX 7000e or VSX 8000 with the Polycom PowerCam™ Plus camera, you can set the camera to automatically point to the person speaking or to move to the preset location that is closest to the speaker. Use this feature only if you expect the meeting participants to sit or remain somewhat stationary during the meeting.






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Automatic camera tracking is disabled when your site is muted and when the people at the far site are speaking.


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### To enable automatic camera tracking to the speaker:


1. Press  **Near** or  **Far** to choose the near-site or far-site camera.
2. Press  **Auto** until you see “Automatic Camera Tracking.”

### To enable automatic voice tracking to camera presets:

1. Press  **Near** or  **Far** to choose the near-site or far-site camera.
2. Press  **Auto** until you see “Automatic Camera Tracking to Presets.”

The near-site camera icon changes to  to let you know that automatic voice tracking to camera presets is enabled.

### To disable automatic voice tracking to camera presets:

- Press  **Auto** until you see “Automatic Camera Tracking Off.”

You can also turn off automatic tracking by using the remote to pan, tilt, or zoom the camera.



## Controlling What You Hear

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### Adjusting Volume

Use the remote control to raise or lower the volume of the sound you hear.

#### To adjust the volume:


- Press  **Volume**.


Changing the volume affects only the sound you hear at your site.

### Muting the Microphone

You can mute the microphone if you do not want the far site to hear you.

#### To mute or unmute the microphone:

- Press  **Mute** on the remote control.

For VSX set-top and component systems that use a Polycom microphone, you can also mute the call by pressing  on the microphone.



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Muting the microphone does not mute audio being sent to the far site from a VCR, DVD player, or computer.

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## Showing Content

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You may be able to show the following to the far sites:

- ❑ Any information stored on a computer
- ❑ A paper document or object placed on a document camera
- ❑ A videotape or DVD

You can share one type of content or one video source at a time, and you can switch to a different type of content or video source if you need to. Participants at other sites can also share content or video sources.

### Showing Content from a Computer

If you have a VSX set-top system with a Visual Concert™ VSX connected to it, or a VSX component system with an ImageShare™ II connected to it, you can attach a computer and show content that is stored on the computer.

If you have the Polycom People+Content IP option enabled on your VSX system and the software application installed on your computer, you can show content from any Windows XP or Windows 2000 computer that is connected to the network. For more information about enabling People+Content IP on your VSX system, talk to the administrator of your VSX system.



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People+Content IP provides video-only content. No audio is shared.

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If your computer is connected to the LAN, you can also share content from network locations. When you share content from a computer, the far site sees you and what you see on the computer screen.


## Showing Content with People+Content IP

### To install the People+Content IP application on a computer:



1. On a computer with Windows XP or Windows 2000, open a web browser and go to [www.polycom.com](http://www.polycom.com).
2. Download and install the People+Content IP application from the Polycom Resource Center.

### To start showing content:

1. On the computer, start the Polycom People+Content IP application.
2. Enter the IP address of your video conferencing system and the meeting password, if one is set.
3. Click **Connect**.
4. Open the content you want to show, and do one of the following:
  - Click  in People+Content IP.
  - Press  **Graphics** on the video conferencing system's remote control.

When you are sending content, the  content sharing icon appears on your main monitor. Depending on the configuration of your system, you may also see the content on your monitor or projector.

### To stop showing content:

1. If the People+Content IP toolbar is minimized, maximize it by clicking the icon in the task bar.
2. Do one of the following:
  - Click  in People+Content IP.
  - Press  **Graphics** on the video conferencing system's remote control.
3. If others in the conference want to send content from the same VSX system using People+Content IP, click the down arrow then **Disconnect** to disconnect from the VSX system so that they may connect. Only one computer at a time can be connected to a VSX system.

## Showing Content with a Visual Concert VSX or ImageShare II

Before you show content, check that the computer video is configured to use one of these supported resolutions and refresh rates:

Resolution	Refresh rates (Hz)
640 x 480	60, 72, 75, 85
800 x 600	60, 72, 75, 85
1024 x 768	60, 70, 75, 85
1280 x 1024 (scaled and sent to the far site in 1024 x 768 format)	60




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To set the resolution and refresh rate, go to your computer's Display Control Panel.

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### To start showing content using a Visual Concert VSX:




1. Connect the computer to a Visual Concert VSX device:







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For more information about using the Visual Concert VSX device, see the *Visual Concert VSX Quick Tips*, available at [www.polycom.com/videodocumentation](http://www.polycom.com/videodocumentation).

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2. Press  on the Visual Concert VSX, or press  **Graphics** or  **Camera** on the remote control.

### To stop showing content using a Visual Concert VSX:

- Press  on the Visual Concert VSX or press  **Graphics** or  **Camera** on the remote control.

### To show content using an ImageShare II:

1. Connect the computer to an ImageShare II:



2. Press the blue ImageShare selection button to start and stop displaying content.



## Showing Content from a Document Camera, VCR, or DVD Player

All VSX systems enable you to show different types of information to other sites in a call, such as through a document camera, VCR, or DVD player.



### Before the call begins:

1. Make sure the document camera, VCR, or DVD player is connected and powered on. Refer to the setup sheet that came with your system.
2. Position your document or object in the document camera or insert the videotape or DVD.

### To start showing a document, object, videotape, or DVD in a call:

1. Press  **Camera** on the remote control.
2. Select a video source.
3. Press  on the remote control.

### To stop showing a document, object, videotape, or DVD in a call:



1. Press  **Camera** on the remote control.
2. Select the main camera.
3. Press  on the remote control.

## Including Multiple Sites in Calls

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You can place or participate in multipoint conferences that include up to four sites. During a multipoint conference, the CallManager enables the video to switch between sites so that you can always see and hear the participant who is speaking. You can also share content in a multipoint call, just as you can in a point-to-point call.

### To place a multipoint call:

1. Call the first site.
2. When the call connects, press  **Call** on the remote control.
3. Select **Conference**, and place a call to the next site.
4. When the call connects, press  **Call** and select **Conference Complete**.
5. Repeat steps 2 through 4 until up to four sites are connected.

## Changing the Way Calls Are Answered

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Your system administrator may have configured the system to let you choose the way incoming calls are handled.

### Answering Calls Automatically

Depending on your system configuration, you can specify whether to answer calls automatically or to have the system announce incoming calls and wait for you to answer manually.





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Automatically answering calls is convenient, but it can create security issues. An unexpected caller could interrupt a meeting in progress or look at equipment and notes left in an empty room.


To prevent incoming callers from overhearing a conversation not intended for them, you can choose to mute all automatically answered calls.

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### To automatically answer calls:



1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. If you want to automatically answer incoming point-to-point calls, scroll to **Auto-Answer Point to Point Video**, press  on the remote control and select **Yes**.
4. Press  **Home** to save your change and return to the home screen.

## Muting Automatically Answered Calls

Depending on your system configuration, you can choose whether to mute the audio when calls connect if your system is configured to answer calls automatically. This prevents callers from overhearing conversations or meetings. After the call connects, you can press  **Mute** when you're ready to unmute the call.

Note that, if you enable this option during a call, the audio for the current meeting is not affected.



### To mute automatically answered calls:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Scroll to **Mute Auto-Answer Calls** and press  on the remote control to enable the option.
4. Press  **Home** to save your change and return to the home screen.

## Forwarding Calls to Another System

Your administrator may have enabled your system to allow you forward all calls to another system.

### To forward calls to another system:

1. On the Place a Call screen, select  in the lower right corner of the screen.
2. Select **Forward**.
3. Enter the extension that will receive calls and select **Enable**.
4. Press  **Home** to save your change and return to the home screen.


## Scheduling Calls

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You can use the calendar and call scheduling feature to schedule video conferences. When you schedule a call using this feature, the system automatically calls the site you selected on the date and time you specified. For recurring calls, you can indicate whether you want the system to automatically make the call daily, weekly, or monthly.

### To schedule a call:

1. Select **System** from the Place a Call screen.
2. Select **Utilities** from the System screen.

3. Select **Call Scheduler** from the Utilities screen.
4. Select **New Entry** from the Call Scheduler screen.
5. Select the directory and then select a single-site or multiple-site entry to call.
6. Select the date and time for the call.
7. Select  **Next** and specify whether the meeting repeats.

On the scheduled time and date, your VSX system will automatically call the selected site.

**To view scheduled calls in the calendar:**

1. Select **System** from the Place a Call screen.
2. Select **Utilities** from the System screen.
3. Select **Calendar** from the Utilities screen.



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Dates with scheduled calls are marked in the calendar with a small green triangle.

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## Customizing Your Workspace



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You can customize what you see on the screen, depending on how your system is configured. You can change these options before you place a call and when the system is in a call.

### Allowing the Far Site to Control Your Camera

Depending on your system configuration, you can allow the far site to control your camera. This enables the other participants to adjust what they see. Far-site participants can also set and use presets for your camera, if their system supports this.

#### To allow the far site to control your camera:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Scroll to **Far Control of Near Camera** and press  to enable the option.
4. Press  **Home** to save your change and return to the home screen.




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Changing this setting takes effect immediately, even if a call is in progress.

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### Displaying the Far Site's Name When the Call Connects

Depending on your system configuration, you can specify whether to display the far site's name when the call connects and how long to leave the name on the screen.




#### To specify when to display the name of the far site:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Select  **Next** to see more settings.
4. Scroll to **Far Site Name Display Time**, press  on the remote control, and select to display the far site's name during the entire call, for a specified time, or not at all.
5. Press  **Home** to save your change and return to the home screen.

## Hearing Audio Confirmation When You Dial

Depending on your system configuration, you can set up the system to speak each number as you enter it in the dialing entry field on the Place a Call screen.

### To enable audio confirmation:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Select  **Next** to see more settings.
4. Scroll to **Keypad Audio Confirmation** and press  on the remote control to enable the option.
5. Press  **Home** to save your change and return to the home screen.

## Adjusting for Room Lighting

Depending on your system configuration, you can use the backlight control to adjust the brightness of the video that the main camera sends to the VSX system. Adjusting this setting can be helpful when the room arrangement results in strong light coming from behind the people in the picture.





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Because backlight controls adjust the main camera, these controls will not make content from a computer or a document camera appear brighter.

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### To turn backlight compensation on:




1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Scroll to **Backlight Compensation** and press  on the remote control to enable the option.
4. Press  **Home** to save your change and return to the home screen.

## Changing the System Color Scheme

Depending on your system configuration, you may be able to change the color scheme of your VSX system screens.

### To change the color scheme:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.

3. Select  **Next** to see more settings.
4. Scroll to **Color Scheme**, press  on the remote control, and select one of the color schemes.
5. Press  **Home** to save your change and return to the home screen.

## Video Conferencing Tips

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Read through these quick tips for ideas on how to optimize your video conferencing experience. You'll find general tips for a better meeting, as well as simple suggestions for improving video and audio quality, and for showing documents.

### Tips for Great Meetings

- ❑ Make sure you have the video number(s) of the site you want to call or that the site is listed in a directory.
- ❑ Set your camera presets before you start your call so that you can quickly use them during the call. (You can set up to 100 near-site presets. Depending on the system you call, you may also be able to use the presets stored on the far-site system.)
- ❑ Add peripherals to your system to expand its use. For example, you can add a VCR if you want to show a videotape, or add a Visual Concert VSX or ImageShare II if you want to share data from a computer. Connect and test your peripheral before any meeting.

### Tips for Great Video

- ❑ Avoid wearing bright colors, all-light or all-dark clothing, or very "busy" patterns (such as small checks or narrow stripes). Light pastels and muted colors look the best on the screen.
- ❑ If there are windows in the room, close any drapes or blinds. Daylight is a variable light source and can conflict with interior room lighting.
- ❑ Use natural gestures when you speak.
- ❑ When adjusting your camera, try to fill the screen as much as possible with people rather than with the table, chairs, walls, lights, or the floor.

### Tips for Great Audio

- ❑ Speak in your normal voice without shouting.
- ❑ Ask the people at the other site if they can hear you. Have them introduce themselves so you can be sure that you can hear them.
- ❑ Mute the microphone before moving it during a meeting.
- ❑ Since the audio has a very slight delay, you may want to pause briefly for others to answer you or to make comments.
- ❑ As with any meeting, try to limit side conversations.

### **VSX Set-Top and Component Systems**

- ❑ Place the microphone on the table in front of the people in the meeting. If your room is very large, consider adding another microphone.
- ❑ Don't place papers or other objects on or in the way of the microphone, and don't rustle papers or tap on the microphone or table.

### **Tips for Showing Content**

- ❑ Check that your computer has the application you need to show your documents, such as Microsoft® PowerPoint, Project, or Word.
- ❑ For a smoother presentation, be sure your file, videotape, or DVD is ready to show. Test it before you start the video call.