



Scheduler's Guide

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Polycom[®] RealPresence[®] Resource Manager System



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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:

- [Scheduling Participants and Endpoints](#)
- [Scheduler Roles](#)
- [Conference Types](#)
- [Scheduler Overview](#)
- [Conference Menu Overview](#)
- [User Menu Overview](#)

Scheduling Participants and Endpoints

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.

Also, if you schedule participants into conference as **Dial In** participants, the conference will require external MCU resources.

Scheduler Roles

Using the RealPresence Resource Manager system web scheduling interface, users assigned the default **Scheduler** and **Advanced Scheduler** roles can create one-time or recurring 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
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

Conference Types

This section describes the different types of conferences the system manages. This includes:

- [Future and Anytime Conferences](#)
- [Direct and Pooled Conferences](#)

Future and Anytime Conferences

When you are scheduling conferences using the RealPresence Resource Manager system, you can add two types of conferences:

- **Future**—Conferences that begin immediately or sometime in the future. These conferences have start and end times and can be recurring. Once you have selected a future conference type, next you decide whether you want to create a [Direct Conference](#) or a [Pooled Conference](#).
- **Anytime** — Ad hoc 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. For more information, see [Schedule an Anytime Conference](#).

Direct and Pooled Conferences

When first adding a future conference, you can choose between two types of conferences:

- [Direct Conference](#)
- [Pooled Conference](#)

Direct Conference

A direct conference is a conference that is managed directly on a RMX system through the RealPresence Resource Manager system.



Update the Default Entry Queue on the RMX Bridge for Direct Conferences

You must change the default entry queue setting to “standard lobby” if you want users to be able to join a conference early. The default entry queue mode is “ad hoc”. This means that if a participant joins the conference early, the conference will not start. If you change the default EQ setting to “standard lobby” participants can join the conference at any time until it is over.

Ending a Scheduled Conference

Scheduled direct conferences do not end until the last participant leaves the call.

Bridge Selection

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

Because this bridge list depends on the template selection, 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.

Those without the Advanced Scheduler role do not see the bridge selection field at all.

Bridge Scheduling and Reassignment

When a conference is scheduled, by default the system automatically assigns the conference to a bridge unless a user with the default **Advanced Scheduler** 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 E-mail message to all scheduled participants. This updated E-mail includes a new dial-in number that dial-in participants must use to join the conference.
- If the system cannot successfully reassign the conference to another bridge, the conference fails to start. The system sends an E-mail to notify the conference organizer of the failure.

Some notes about bridge reassignment:

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

The system will chain bridge reassignments. This means that if the next bridge to which the system assigns a conference is down at the time the system tries to start the conference, the system will try to reassign the conference again.

Pooled Conference

A pooled conference is a conference hosted on the RealPresence DMA system. Instead of selecting a bridge for your conference, you select a RealPresence DMA pool order to manage your conference calls.

Pooled conferences are scheduled by the RealPresence Resource Manager system. Resources are allocated at the time of conference initiation by the RealPresence DMA system placing the call on a pool of managed MCUs (RMX or Codian). 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 create a pooled conference, 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 associate it with the scheduled conference.

You can also use an existing VMR number that has been created on the RealPresence DMA system. When you use an existing RealPresence DMA VMR, you can view the VMR settings on the RealPresence DMA VMR as scheduled, 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 Participants in Pooled Conferences

When scheduling participants in pooled conferences, you are limited by the following:

- You must use a modified dialing number when scheduling an ISDN dialout participant. Use the Use Modified Dial Number checkbox when scheduling an ISDN dialout participant.
- When scheduling a dialout SIP participant, you cannot use an extension or schedule the participant as audio-only or encrypted.
- When monitoring a pooled conference that has ISDN, encrypted or audio-only H.323 participants, these participants will appear as disconnected.

Scheduler Overview

As a scheduler, when you log into the RealPresence Resource Manager system, the system displays the main screen with a **Conference** menu. When you click Conference, you can select from these conference types: Future, Ongoing, or Anytime.

For more information, see [Conference Menu and Views](#).



Scheduling Anytime Conferences

Anytime conferences are supported if the RealPresence Resource Manager system is connected to a RealPresence DMA system.

The User menu enables you to select the Guest Book and view users or add guests to the guest directory. For more information, see [User Menu and Guest Book](#).

You might also see these menu items:

Description

Settings. Click here to display a **Settings** dialog with the following information:

- **User Name**
- **Remote Server**
- **Software Version**
- **Font Size**

In this dialog, you can also:

- Change the font size used in your display of the RealPresence Resource Manager system web interface.
- Change your password, if you are a local system user.

Downloads. Click here to display the **Downloads** dialog with the downloadable applications compatible with the RealPresence Resource Manager system. Downloadable applications may include:

- Polycom CMA Desktop PC or MAC client (including the path to the application)
- RealPresence Mobile and Desktop clients
- Polycom File Verification Utility

Description

Log Out. Click here to log out of the RealPresence Resource Manager system.

Note

The RealPresence Resource Manager system has an inactivity timer. If you are logged into the system but do not use the interface for a specified period of time, the system automatically logs you out.

Help. Links to the RealPresence Resource Manager system online help.

Conference Menu Overview

This section includes some general information you should know about the Conference menu and views. It includes these topics:

- [Conference Menu and Views](#)
- [Conference Views—Future and Ongoing](#)
- [Conference Views —Anytime](#)
- [Context-Sensitive Conference Actions](#)

Conference Menu and Views

The **Conference** menu provides these views of the **Conference** list:

- **Future**—Displays the list of future scheduled conferences in the main window. Use this view to view and edit future conferences. After selection, the Future-Only filter is enabled.
- **Ongoing**—Displays the list of active scheduled and Anytime conferences in the main window. Use this view to manage ongoing conferences. After selection, the Ongoing-Plus filter is enabled.
- **Anytime** — Displays the list of anytime conferences in the main window. Use this view to manage anytime conferences. Anytime conferences are ad hoc conferences that require no start and stop times.

Users can only work with the conferences that appear in their **Conference** list. By default, schedulers see only their conferences in the **Conference** list. Operators see all the conferences on the system. However, when areas are defined, operators see all the conferences for the areas to which they belong. By default, users assigned other roles cannot view conferences.

The **Future** and **Ongoing** Conference views have these sections.




Section	Description
Views	The views you can access from the page.
Conference Actions	The set of available commands. The constant commands in the Conference views are: <ul style="list-style-type: none">• Refresh — Use this command to update the system display with current information.• Add — Use this command to schedule a new video or audio conference. For the list of context-sensitive Conference commands, see Context-Sensitive Conference Actions .

Section	Description
Conference List	The context-sensitive Conference list for the selected view.
Conference Details	Displays information about the selected conference. For more information, see Conference Details .
Conference Features	Displays the status of system features for the selected conference. For more information, see Conference Features .
Participants	Displays the list of participants for the selected conference. For more information, see Participants .
Participant Details	Displays information about the participant selected in the Participants list. For more information, see Participant Details .

Conference Views—Future and Ongoing

The **Conference** list in both the **Future** and **Ongoing** views includes these fields.

Field	Description
Filter	<p>Use the filter to display other views of the conference list, which include:</p> <ul style="list-style-type: none"> • Future Only - Displays scheduled conferences that have not yet started • Today Only - Displays scheduled conferences (completed, active, or future) for the current day. • Custom Date - Displays scheduled conferences (completed, active, or future) for a selected day. Select the day from the calendar. • Ongoing Plus - Displays active and future scheduled conferences for the day. You can further filter this request by Conference Name, Endpoint Name, Bridge, and Area. • Today Plus - Displays scheduled conferences (completed, active, or future) for the current day, and all future conferences. You can further filter this request by Conference Name, Endpoint Name, Bridge, and Area. • Yesterday Plus - Displays completed scheduled conferences for yesterday and earlier. You can further filter this request by Conference Name or Area. <p>These filters apply to scheduled conferences only. Ad hoc conferences are not displayed in the filtered list.</p> <p>For information on filters, see “Filter and Search a List”.</p>
Export as Excel file	Click this button to download the currently displayed Conference list to a Microsoft Excel spreadsheet.
Status	The state of the conference. For more information, see Conference States .

Field	Description
Type	The type of scheduled conference. Possible values include: <ul style="list-style-type: none"> • Video Conference  — All conference participants have video endpoints. • Direct Conference — Direct conferences are hosted on resources managed by the RealPresence Resource Manager system. • Pooled Conference — Pooled conferences are hosted on resources managed by the RealPresence DMA system. • Audio Only Conference  — All conference participants have audio endpoints. Audio only conferences require an MCU. • Recurring Conference  — The conference is one in a recurring series.
Conference Name	The system- or scheduler-assigned name of the conference. By default, the system assigns a conference name and appends the day and date to that name. The scheduler can change the system-assigned name.
Start Time	The local time of the user's system for the start of the conference. The system appends the time difference between the local time and the standard time.
Bridge	If applicable, the user-assigned bridge for the conference. Possible values are: <ul style="list-style-type: none"> • N/A—A bridge is not required for this conference • [Bridge Name]—The name of the bridge for the conference. • [Pool Order Name]—The name of the pool order for the conference (pooled conferences only).
Creator	The conference creator.
Area	Area or areas assigned to the selected conference owner. You can only view area-specific information for areas that you have permission to manage. <p>Note</p> This field is only visible when Areas are enabled. Your administrator may have renamed this field.
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 value is None.

Conference Views —Anytime

Anytime conferences are supported if the RealPresence Resource Manager system is connected to a RealPresence DMA system.

The **Conference** list in Anytime view has these fields.

Section	Description
Title	Name of the conference
Description	Description of the conference
Virtual Meeting Room (VMR)	Virtual meeting room assigned to the conference
Owner	Person who is assigned control of the conference

Section	Description
Created On	Date on the local system when the conference was originally added
# Participants	Number of participants in the conference

Conference States

Conferences may be in the following states.

State	Description
Future Conference	Scheduled conference that has not yet started. This conference state is possible in all views except the Yesterday Plus view.
Completed Conference	A scheduled conference that occurred in the past. This conference state is possible in all views except the Future and Ongoing Plus view.
Active Conference	A conference that is still active/ongoing. This conference state is possible in all views except the Future and Yesterday Plus view.
Active Alerts Conference	The bridge on which the active/ongoing conference is being hosted has sent an alert. Examples of events that will trigger a bridge alert are: <ul style="list-style-type: none"> 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 applies to Direct Conferences only.</p>
Conference End Warning	The conference is ending. For example, the conference is in its last five minutes unless someone extends it.

Context-Sensitive Conference Actions

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

Action	Description
Available for future conferences only	
Edit	Use this command to edit a conference that you have added. For more information, see Edit a Conference .
Available for future and past conferences	
Delete	Use this command to delete a conference that you have added.
Available for future, past, and ongoing conferences	
Copy	Use this command to copy a conference that you have added.

Action	Description
Available for ongoing conferences only	
Manage	Operators only. Use this command to display the Manage Conference page for the conference selected in the Conference List . Use this command to manage participants and endpoints in the selected active conference. For more information, see Manage an Active Conference .
Terminate	Operators only. Ends the selected conference.

User Menu Overview

This section includes some general information you should know about the Conference menu and views. It includes these topics:

- [User Menu and Guest Book](#)
- [Context-Sensitive Guest Book Actions](#)
- [Add a Guest to the System Guest Book](#)
- [Edit a Guest in the System Guest Book](#)
- [Delete a Guest from the System Guest](#)

User Menu and Guest Book

By default, schedulers, operator, and administrators have access to the **User Menu** and **Guest Book**.

The **Guest Book** is a local system directory that includes guest participants who were either:

- Explicitly added to the **Guest Book**.
- Saved to the **Guest Book** while being added as conference participants.

They are referred to as static entries because they are not imported through the dynamically updated enterprise directory or included in the system **Global Address Book**. The **Guest Book** is limited to 500 entries. The **Guest Book** has these fields.

Field	Description
Name	The guest's first and last name.
Email	The guest's E-mail address. The system validates the E-mail 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.

Field	Description
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.

Context-Sensitive Guest Book Actions

The **Actions** section of the **Guest Book** page may include these context-sensitive actions depending on what is selected.

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

Add a Guest to the System Guest Book

You can add a guest to the Guest Book.

To add a guest to the system Guest Book:

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

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

Field	Description
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.

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

Field	Description
Number Type and Number	The format and value 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.
Extension	The specific dial string for the guest. For Annex-O dialing, enter the H.323.alias@IP here, for example: <ul style="list-style-type: none"> • 1001@11.12.13.14 • 1001@domain.com • username@domain.com • username@11.12.13.14 Note Polycom endpoints must register with a gatekeeper before they'll attempt an Annex-O call.
MCU Service	Choose from the list of MCU services defined on the MCUs 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 change the information associated with a guest in the Guest Book.

If you choose to modify a guest who is scheduled in a future conference or participating in an ongoing conference, the guest book changes will not be updated to 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 **Edit Guest**.
- 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

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 **Delete Guest**.
- 3 Click **Yes** to confirm the deletion.

Managing Conferences and Participants

section describe the Polycom® RealPresence® Resource Manager system conference and participant management operations. It includes these topics:

- [Manage an Active Conference](#)
- [Add Additional Participants to an Active Conference](#)
- [Add a Room to an Active Conference](#)
- [View the Video of a Participant in an Active Conference](#)
- [Join an Active Conference](#)
- [Add a Participant from a Favorites List to an Active Conference](#)
- [Add/Save a Participant to a Favorites List](#)
- [Manage a Participant's Endpoint During a Conference](#)
- [View a Participant's Details During a Conference](#)
- [Terminate an Active Conference](#)
- [Delete a Conference](#)
- [Export a List of Conferences](#)

Manage an Active Conference

The **Manage Conference** page provides a detailed view of a single active conference and enables an operator to make changes to the conference.



Managing adhoc conferences on the RealPresence DMA System

You cannot monitor or manage adhoc conferences taking place on the RealPresence DMA system. These conferences may display in the ongoing conferences list but because the RealPresence Resource Manager system does not directly manage ad hoc conferences that take place on bridges managed by the RealPresence DMA system, conference information is inconsistent.

To manage an active conference:

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

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

Section	Description
Status	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 • ISDN • SIP
Address	The IP address, 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 on which the participants call resides.

3 Use these conference actions as needed:

Action	Use this action to...
Terminate	End an active conference.
Extend Duration	Extend the duration of an active conference.
Change Layout	For applicable endpoints. Change the default video layout for the conference display. <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.
Add Participant	Add one or more participants to the selected conference.
Add Guest	Add a guest to the selected conference.
Add Room	Add one or more rooms to the selected conference.
Add Favorites	Add participants from one of your Favorites lists to the selected conference.
Join Conference	Join the conference, monitor the conference, and talk with participants as needed.

4 Use these participant actions as needed:

Action	Use this action to...
Mute or Unmute Audio	Mute or unmute the selected participant's audio line into the conference. This option appears only when the conference is running on an external MCU. The Audio column in the Participants list shows the current status of this setting.
Block or Unblock Video	Block or unblock the selected participant's video line into the conference. This option appears only when the conference is running on an external MCU. The Video column in the Participants list shows the current status of this setting.
Connect or Disconnect	Disconnect or reconnect the selected participant to the conference. A disconnected participant is still associated with the conference and cannot be scheduled for other conferences.
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.
Acknowledge Help	Acknowledge a request for help and send a message to the requesting endpoint.
Manage Device	Open the web-based user interface for the selected participant's endpoint in a new browser window. NOTE: Not available when managing a conference.
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.
Connect All New	Function available only when the system is displaying the New Conference Participants list. Initiates the system dial out to new participants.

Working with RealPresence Immersive Studio Systems

RealPresence Immersive Studio systems display as expandable folders containing an icon for each of the codecs associated with the endpoint. You can only perform **Participant** actions on a RealPresence Immersive Studio system when you have the folder selected.

CONFERENCE | Ongoing

Views: Direct Conference Templates, Conference Settings, Favorites

CONFERENCE ACTIONS: Terminate, Extend Duration, Change Layout, Add Participant, Add Guest, Add Room, Join Conference

PARTICIPANT ACTIONS: View, Mute Audio, Block Video, Disconnect, Remove, Send Message

Participants Table:

	Status	Type	Name	Endpoint	Access	Number
[Folder Icon]	[Mute]	[Video]	wl2 w	wwl2GroupSer	H323	172.21.99.2
[Folder Icon]	[Mute]	[Video]	wl3 w	wwl3ITP_3_1	H323	172.21.113.
[Folder Icon]	[Mute]	[Video]	wl3 w_3_1	wwl3ITP_3_1	H323	172.21.113.
[Folder Icon]	[Mute]	[Video]	wl3 w_3_2	wwl3ITP_3_2	H323	172.21.113.
[Folder Icon]	[Mute]	[Video]	wl3 w_3_3	wwl3ITP_3_3	H323	172.21.113.

You must select the folder icon of a RealPresence Immersive Studio system in order to access Participant Actions during a conference.

Writing Conference Notes During a Conference

Participants with scheduler permissions can write conference notes during an ongoing conference.

To create a conference note:

- » Click the **Conference Notes** pane, type a note, and click **Save**.

The note becomes visible on any RealPresence Resource Manager browser session where other users are monitoring the same conference.



Undoing Changes

If you type a note and then decide to undo your changes, click **Escape** to return to the original note.

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 > Ongoing**.
- 2 From the list of **All Conferences**, select the conference of interest and click **Manage**.
- 3 Click **Add Participant**.
- 4 Enter all or part of a participant's **Last Name** or **First Name** into the appropriate field and click **Search**.

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



Search Results

The search results only include users associated with endpoints.

- 5 Select the participant's name from the list.
The participant's name appears in the underlying **New Conference Participants** list.
- 6 Repeat steps [Click Add Participant](#) through [Select the participant's name from the list](#) to add all domain participants and then click **Close**.
- 7 If necessary, edit the new participants' settings. See [Edit a Participant's Settings](#).
- 8 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.

To add participants from the Guest Book:

- 1 Click **Add Guest**.
- 2 From the **Guest Book** dialog, select the guest's name from the list.
The guest's name appears in the underlying **New Conference Participants** list.
- 3 Repeat step 2 to add all guest participants and then click **Close**.
- 4 To add new guest participants (participants not available from the local directory, enterprise directory, or **Guest Book**), see step [To Add New Guest Participants](#).
- 5 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 > Ongoing**.
- 2 From the list of **All Conferences**, select the conference of interest and click **Manage**.
- 3 From the **Conference Actions** list, click **Add Room**.
- 4 From the **Add Room** dialog, select the site location of the room.
The list of conference rooms at the site appears.
- 5 Select the conference room of interest.
The conference room name appears in the underlying **New Conference Participants** list.
- 6 Click **Close**.
- 7 To initiate the system dial out to the room, select the room from the **New Conference Participants** list and click **Connect New Participants**.
The system dials out to the room endpoint system and adds the room to the conference.

View the Video of a Participant in an Active Conference

You can view the video of the participant in an active conference.

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

- 1 Go to **Conference > Ongoing**.
- 2 From the list of **All Conferences**, select the conference of interest and click **Manage**.
- 3 Select a participant from the **Participants** list.
The selected participant's video appears in the **Conference Image** section of the interface.
- 4 Click **Shuffle** to shuffle to the next participant's video.

Join an Active Conference

By default, users assigned the **Operator** role can join an active conference to offer conference support.

To join an active conference:

- 1 Go to **Conference > Ongoing**.
- 2 From the list of **All Conferences**, select the conference of interest and click **Manage**.
- 3 From the **Conference Actions** list, click **Join Conference**.
The **Join Conference** dialog appears.
- 4 If you have multiple endpoints, choose the endpoint to use to join the conference.
- 5 Click **Join Conference**.
Your endpoint is added to conference with your video blocked but your audio not muted.

Add a Participant from a Favorites List to an Active Conference

By default, users assigned the **Operator** role can work with favorites lists.

To add a participant from a favorites list to an active conference:

- 1 Go to **Conference > Ongoing**.
- 2 From the list of **All Conferences**, select the conference of interest and click **Manage**.
- 3 From the **Conference Actions** list, click **Add Favorites**.
- 4 From the **Favorites List**, expand the list of interest.
The names of the participants in the list is displayed.
- 5 Select the participant of interest from the list.
The participant's name appears in the underlying **New Conference Participants** list.
- 6 Repeat steps 4 and 5 to add all participants from **Favorites List** and then click **Close**.
- 7 To initiate the system dial out to new participants, select the participants of interest from the **New Conference Participants** list and from the **New Participants Action** menu, click **Connect New Participants**.

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

Add/Save a Participant to a Favorites List

By default, users assigned the **Operator** role can work with favorites lists.

To add or save a conference participant to a favorites list:

- 1 Go to **Conference > Ongoing**.
- 2 From the list of **All Conferences**, select the conference of interest and click **Manage**.
- 3 From the **Participants** list, select the participant of interest.
- 4 From the **Participant Actions** menu, click **Save as Favorite**.
The names of the participants in the list is displayed.
- 5 From the **Save as Favorite Participant** dialog, select the Favorite List to which to save the participant and click **OK**.

Manage a Participant's Endpoint During a Conference


The **Manage** page also allows operators to manage conference participant's endpoints.



Using the Commands on the Manage Page

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

To manage a participant's endpoint:

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

View a Participant's Details During a Conference


This procedure describes how to view details for a participant's endpoint while it is in conference.





Working with RealPresence Immersive Studio systems

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 > Ongoing**.
- 2 Select the conference of interest and click **Manage**.
The **Participants** list appears.
- 3 To view participants geographically, click .
- 4 Double-click on the participant of interest.
The **View Participant Details** dialog 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](#).
- 5 To view additional participant details, change the selection in the **Call Properties** drop-down menu.
 - If you select **Device**, you'll see these participant details:

Setting	Description
Endpoint Type	Usually the endpoint model, such as Polycom HDX system.
IP Address	The IP address for the endpoint.
Site	The location of the endpoint as identified by its IP address and the subnet of the site.
Gatekeeper	The gatekeeper with which the endpoint is registered.
GDS	The Global Directory Service for the endpoint. Usually the Polycom Global Address Book.

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

Terminate an Active Conference

You can terminate an active conference.

To terminate an active conference:

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

Delete a Conference

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

To delete a conference:

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

The conference is deleted. For future conferences, the system E-mails 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 Only.

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

- 1 Navigate to **Conference > Future**.
- 2 In the **All Conferences** list, be sure the list is filtered according to the **Future Only** filter.
- 3 Click **Export as CSV File**.

Conference Scheduling

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

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



Multi-Tenancy Roles

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 Future Conference

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

See [Conference Scheduling Overview](#) for an overview about conference scheduling.

Task Overview

- [Task 1: Set a Time for the Conference](#)
- [Task 2: Select a Conference Type](#)
- [Task 3: Select a Bridge or Pool Order to Use](#)
- [Task 4: Edit Conference Settings](#)
- [Task 5: Add Conference Participants and Guests](#)
- [Task 6: Define a Video Chairperson, Lecturer or Owner](#)
- [Task 7: Review the Conference](#)



Viewing the System Time

When scheduling conferences, be aware that the time displayed in the lower left hand corner of the RealPresence Resource Manager system is associated with the time clock of the local PC.

To view the RealPresence Resource Manager system time, navigate to Admin > Server Settings > System Time. You must have the administrator role to view this setting.

Task 1: Set a Time for the Conference

- 1 Go to **Conference > Future** and under **Conference Actions**, click **Add**.
- 2 On the conference scheduling page, select either **Direct Conference** or **Pooled Conference**.



Scheduling Pooled Conferences

If your RealPresence Resource Manager system is not integrated with a RealPresence DMA system, you cannot create a Pooled conference.

- ◆ Direct Conference - A conference hosted on an MCU that is managed by the RealPresence Resource Manager system. For more information, see [Direct and Pooled Conferences](#).
 - ◆ Pooled Conference - A conference hosted on an MCU that is managed by the RealPresence DMA system. For more information, see [Direct and Pooled Conferences](#).
- 3 Enter a new **Conference Name** or accept the default name.
 - 4 Under the **Select Conference Dates and Settings** section, set a conference **Start Date** and **Start Time**, and either an **End Time** or **Duration**.

By default, conferences do not end until the last participant hangs up. To change this setting, you need to modify the conference template properties from the Polycom RealPresence Collaboration Server or Polycom RMX. See the Polycom RealPresence Collaboration Server (RMX) Administrator's Guide.

- 5 If you want to make the conference recurring:
 - a 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.

 - b Click **OK**.



Recurring Pooled Conferences

Pooled conferences scheduled as recurring conferences are always active for the entire time frame of the recurrence. This means that the VMR associated with a recurring pooled conference remains associated with that conference even outside of scheduled hours. For example, the VMR associated with a recurring conference scheduled at 9 a.m. on Mondays will be active for that conference throughout the week.

Task 2: Select a Conference Type

When you are scheduling a direct conference, you need to choose the type of conference you are scheduling. You can schedule a video conference or an audio only conference.

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.

- 6 For **Conference Type**, select **Video** or **Audio Only**.

Task 3: Select a Bridge or Pool Order to Use

Users with the advanced scheduler or operator role can choose a particular bridge or RealPresence DMA pool order to use for the scheduled conference.

- 7 If scheduling a direct conference, make your selection from the **Bridge Selection** drop-down list.
 - **Auto Bridge:** enables the system to select a bridge.
 - **Single Bridge:** Enables you to select an MCU from the **Scheduled MCU** list to host the conference.
- 8 If scheduling a pooled conference, make your selection from the **DMA Pool Orders** drop-down list.
- 9 Select the **Conference Mode** to use.

Conference Mode	Definition
All	Supports all conference modes.
VSW (Video Switching)	<p>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).</p> <p>If this 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.
CP (Continuous Presence)	<p>Continuous Presence (CP) mode, in which the MCU selects the best video protocol, resolution, and frame rate for each endpoint according to its capabilities.</p> <p>Select this mode if scheduling only AVC endpoints.</p> <p>This is the only mode that supports the use of Polycom MCU profiles, third-party and legacy endpoints, and legacy RMX MCUs.</p>
SVC (Scalable Video Coding) only	SVC conferencing is only possible with Polycom MCUs and endpoints that support H.264 SVC.
CP and SVC	<p>Enables both AVC-only endpoints and endpoints supporting SVC to join the conference. If the selected MCU doesn't support SVC, the conference is started in AVC mode.</p> <p>Note: If the MCU supports SVC but not mixed mode (RMX 7.8), the conference fails to start.</p>

- 10 To change the **Conference Template**, choose a difference template from the **Conference Template** drop-down list.

The available conference templates are automatically filtered according to the **Conference Mode** you selected and listed in alphabetical/numerical order. When choosing a template for a pooled conference, the template list is ordered by the priority that was defined for the template in the RealPresence DMA system.

Task 4: Edit Conference Settings

By default, users with the **Advanced Scheduler** role can overwrite certain conference template settings as described here.

Conference settings are view-only unless you have the advanced scheduler role. Users with the advanced schedule role can edit conference settings such as video chairperson, virtual room number, and conference passcode.



Administrator's Note: Configure MCUs Similarly

Two conferences scheduled with the same template may have different settings and behavior if they are hosted on different types of MCUs. Minimize or eliminate such differences by ensuring that all MCUs are similarly configured.

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

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

Setting	Description
Conference ID	<p>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.</p> <p>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.</p> <p>Not available for Pooled Conferences.</p>
Conference Passcode	<p>By default, the system assigns an 15-digit Conference Passcode and provides this passcode to participants within the content of the conference notification E-mail.</p> <p>You can change this passcode to another 4-digit through 16-digit number.</p>
Enable Chairperson	<p>You can select a video chairperson to control the conference from his or her video endpoint system. The video chairperson must have a video endpoint system and Chairperson conferences require an MCU.</p> <p>Notes</p> <ul style="list-style-type: none">• If the conference template has the Conference Requires Chairperson parameter enabled, then Enable Chairperson is automatically selected and cannot be changed.• Polycom RMX 1000 systems do not support the Chairperson feature.
Chairperson Passcode	<p>If Enable Chairperson is selected, the system assigns an 15-digit Chairperson Password and provides this password to the video chairperson in a separate E-mail.</p> <p>If Enable Chairperson is selected, the chairperson must enter this 15-digit password at his or her video endpoint to assume control of the conference.</p> <p>You can change this password to another 4- through 16-digit number.</p>

Setting	Description
Room ID	Define the virtual meeting room number to be used for this conference. This setting is only available for pooled conferences.
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>

Setting	Description
People + Content	<p>Controls the ability for one endpoint to send two types of data—a data stream and a video stream—over the same bandwidth to display people and content. The receiving endpoint handles the two video streams differently and may display them on separate screens or through video switching mode.</p> <p>Endpoints that do not support the selected method connect with either video through IP or audio only through ISDN.</p> <p>Select from these available settings:</p> <ul style="list-style-type: none"> • None. Select this option when dual data streams are not required. • People +Content (H.329). This enables the industry standard H.239 dual streams for endpoints that support H.239 or the Polycom proprietary People+Content dual streams for older Polycom endpoints without H.239 capabilities. The MCU requires that conferences with People + Content use a minimum speed of 192 K. • People and Content VO. This Polycom proprietary technology works with PictureTel endpoints. Select this option for older endpoints. • Duo Video. This setting supports IP and ISDN and is available with TANDBERG endpoints, in which one part of the conference is set as the video conference and the other as the presentation conference. <p>Not available for Pooled Conferences.</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.</p> <p>Not available for Pooled Conferences.</p>

13 Once you are satisfied with the conference settings, click **Schedule Conference**.



Tips for Using Conference Templates

- 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 Direct Conferences are defined in the RealPresence Resource Manager system, while conference templates for Pooled Conferences are defined in the RealPresence DMA system.

Task 5: Add Conference Participants and Guests

14 You may add participants to conferences in the following ways:

➤ To Add Conference Participants from a Directory

- a Enter all or part of a participant's **Last Name or Room Name** or **First Name** into one of the name fields and click **Add Participants**.

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



Search Results

The search results only include participants associated with endpoints.

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

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

- c Repeat these steps to add all directory participants and then click **Close**.

➤ To Add Conference Participants from a Guest Book

- d Click **Add from Guest Book**.

- e In the **Add from Guest Book** dialog, select the guest of interest's name from the list.

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

- f Repeat to add all participants from the **Guest Book** and then click **Close**.



Adding New Guests

You must be an Advanced Scheduler to add a guest that is not in the guest book.

➤ To Add New Guest Participants

If you have the advanced scheduler role, you can add new guests to the Guest Book, see [Add a Guest to the System Guest Book](#).

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

➤ To Add Conference Rooms to a Conference

- g Click **Select Site**.

-
- h Select the site of interest from the site list
 - i The conference room list for the selected site appears.
 - j Select the conference room of interest from the list.
The conference room name appears in the underlying **Selected Participants and Rooms** list.
 - k Repeat these steps to add all required conference rooms and then click **OK**.

Task 6: Define a Video Chairperson, Lecturer or Owner

- 15 If available, select a **Lecturer, Video Chairperson, or Owner**.

Task 7: Review the Conference

- 16 Review your participant list and your settings.
- 17 Adjust the conference date and time as needed to match participant and endpoint availability. Review availability and adjust the conference date and time as needed.



Participant Availability

- 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.

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

Schedule the Conference

- 18 Click **Schedule Conference** at the top of the page.

Schedule an Anytime Conference

Users with the following default user roles are allowed to schedule Anytime conferences: Scheduler, Advanced Scheduler, Operator, Area Operator and Area Scheduler.



RealPresence DMA System Required

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

Unlike Future conferences, 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 E-mail 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.

To schedule a new Anytime conference:

- 1 Go to **Conference > Anytime** and under Conference Actions, click **Add**.
- 2 Enter a new conference **Name** or accept the system-generated name.
- 3 Enter a **Description** for the conference.
- 4 At **Template**, select a template that your administrator has suggested you use for Anytime conferences.
- 5 Under **Search for Participants and Rooms**, do one of the following to add a participant or a guest:
 - **To add a participant:** Enter a last and first name and click **Add Participants**. Scroll through the list and click once to add a participant. When finished, click **Close**.
 - **To add a guest:** Enter a last and first name and click **Add from Guest Book**. Scroll through the list and click once on a name in the list. When finished, click **Close**.
- 6 Select an **Owner** for the conference.
- 7 Enter a **Virtual Meeting Room ID** to use.
- 8 To save the conference details, click **Save**.

Copy an Existing Conference

Future and past conferences can be copied as a template for a future conference.

Users can only copy conferences that appear in their **Conference** list. By default, schedulers see only their conferences in the **Conference** list, while operators see all the conferences on the system, unless areas are defined. In which case operators see all the conferences for the areas to which they belong. By default, users assigned other roles cannot view conferences.

To copy a conference:

- 1 Go to the appropriate conference view.
- 2 Select the conference of interest and click **Copy**.
- 3 If you used a template other than the default when you created the conference, re-select the template.
- 4 Make the required changes to the conference date, participants, rooms, or other settings. For information on performing these tasks, see [Schedule a Future Conference](#).
- 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 E-mail appears with a message indicating **Conference Successfully Scheduled**.

-
- 6 To exit without sending an updated E-mail message to your participants, click **Skip Email**.

Edit a Conference

You can modify scheduled conferences.

Users can only edit the conferences that appear in their **Conference** list. By default, schedulers see only their conferences in the **Future Conference** list, while operators see all the conferences on the system, unless areas are defined. In which case operators see all the conferences for the areas to which they belong. By default, users assigned other roles cannot view conferences.

To edit a Future conference

- 1 Go to **Conference > Future**.
- 2 Select the conference of interest and click **Edit**.
- 3 If you select a recurring conference, a dialog appears asking if you want to edit all conferences in the series or just the selected one. Make the appropriate choice and click **Edit**.
The conference scheduling page appears.
- 4 To change the template, click **Default Template** or **Default Audio Template** and select a different template, if available.



Using Templates

- Direct 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 to you 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.

- 5 Make the required changes to the conference date, participants, rooms, or other settings. For information on performing these tasks, see [Schedule a Future 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 E-mail appears with a message indicating **Conference Successfully Scheduled**.
- 7 To exit without sending an updated E-mail message to your participants, click **Skip Email**.
- 8 To send an updated E-mail 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 E-mail message. The **Future** 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.

Users can only work with the conferences that appear in their **Conference** list. By default, schedulers see only their conferences in the **Conference** list, while operators see all the conferences on the system, unless areas are defined. In which case operators see all the conferences for the areas to which they belong. By default users assigned other roles cannot view conferences.

To edit a participant's settings:

- 1 Go to **Conference > Future**.
- 2 Select the conference of interest and click **Edit**.
- 3 If you select a recurring conference, a dialog appears asking if you want to edit all conferences in the series or just the selected one. Make the appropriate choice and click **Edit**.
- 4 In the conference scheduling page, select the participant of interest from the **Selected Participants and Rooms** list and click **Edit**.
- 5 In the **Edit Participant Settings** dialog, 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.
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. Note: When scheduling a SIP dial-out participant, you cannot schedule the participant as audio-only, encrypted, or use and extension.
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. Note: You must use a modified dialing number if you are adding a dialout ISDN participant.

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

Users can only view scheduling information for the conferences that appear in their **Conference** list. By default, schedulers see only their conferences in the **Conference** list, while operators see all the conferences on the system, unless areas are defined. When areas are defined, operators see all the conferences for the areas to which they belong. By default, users assigned other roles cannot view conferences.

To view the scheduling information for a Future or Ongoing conference:

- 1 To see the scheduling information for a future conference, go to **Conference > Future**. To see the scheduling information for an active conference, go to **Conference > Ongoing**.
- 2 From the **Filter** list, select the conference type of interest.
- 3 Select the conference to view from the list. Under **Conference Actions**, click **View**.

The **View** conference page appears displaying the following details about the selected Future or Ongoing conference:

Section	Description
Conference Name	The system- or scheduler-assigned name of the conference. By default, the system assigns a conference name and appends the day and date to that name.
Start Date	The date on which the conference started or will start.
End Date	The date on which the conference is scheduled to end.
Duration	The scheduled duration of the conference in hours and minutes.
Recurrence	The recurrence information for the conference.
Owner	The designated person in control of the conference.
Type	The type of conference, either Audio-Video or Audio only.
Conference Passcode	View only. The conference passcode assigned to the conference. For Future conferences, users with the Advanced Scheduler role can change this conference password.

Section	Description
Video Chairperson	Whether or not the conference has a video chairperson. This field will include a participant's name or No Chair. For Future conferences, users with the Advanced Scheduler role can assign a conference chairperson.
Conference Area	The area to which the conference owner belongs. Note: This field is only visible when Areas are enabled. You can only view area-specific information for areas that you have permission to manage.
Participants	Information about the conference participants, including <ul style="list-style-type: none"> • Name • Dial Mode • Participant Type • Access • Endpoint • Area

- 4 To return to the conference list, click **Back to List**. You might need to scroll down to see the **Back to List** button.

To view the scheduling information for an Anytime conference:

- 1 To see scheduling information for an Anytime conference, click Conference > Anytime or under Views, click **Anytime**.
The list of anytime conferences is displayed.
- 2 To view details about a particular anytime conference, select the conference, then view the Participants pane or click **Edit**.
For descriptions of these details, see [Conference Views —Anytime](#).
- 3 The following Participant details are displayed:

Field	Description
Name	Name of the participant
Call Info	Call information about the participant, including Video Dial-Out, Video Dial-In, or an IP address
Call Type	Information about the call type, either H.323, SIP (IP), or H.320 (ISDN).
Dial Options	The type of participant call, either Dial-In or Dial-Out.

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. Note Not applicable for Anytime conferences.
Start Date/Time	For a scheduled conference, the start date and time of the conference and the time difference between the local time and the standard time. For an unscheduled conference, the date and time the conference started.
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

Section	Description
Type	The type of conference. Possible values include: <ul style="list-style-type: none"> • Audio • Audio-Video
Status	The state of the conference. Possible values include: <ul style="list-style-type: none"> • Active 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

Section	Description	
Video Layout	<p>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</p>	
Video Format	<p>For a conference hosted on an MCU, the video format of the conference data stream. Possible values include:</p> <ul style="list-style-type: none"> • Automatic • CIF • QCIF • 4CIF • 16CIF • VGA • SVGA • XGA • NTSC 	
Video Protocol	<p>For a conference hosted on an MCU, the video protocol of the conference data stream. Possible values include:</p> <ul style="list-style-type: none"> • Auto • H.261 • H.263 • H.264 	
Audio Algorithm	<p>For a conference hosted on an MCU, the audio compression ratio of the conference data stream. Possible values are:</p> <ul style="list-style-type: none"> • 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. Note The RMX 1000 system does not support the Chairperson feature.
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.
Lecture Mode	The type of Lecture Mode , if any, that was selected when the conference was created. Possible values are None, Lecture, and Presentation. Note The RMX 1000 system does not support Lecture Mode .
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	Possible values are: <ul style="list-style-type: none"> • None • People+Content • Visual Concert PC • Visual Concert FX • Duo Video • Unknown •
T120 Rate	Possible values are: <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 • 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

Section	Description
Entry Tone	Whether or not an entry tone is played to all connected participants when a participant joins the conference
Exit Tone	Whether or not an exit tone is played to all connected participants when a participant disconnects from the conference

Bridge (MCU) Features

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

Section	Description
MCU Name	The MCU device name hosting the conference. Not applicable when the conference is not being hosted on an MCU.
Numeric ID	The unique conference identifier assigned by the MCU
Entry Queue Access	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

On the Future and Anytime screens, the list of participants identifies users, rooms, and guests invited to participate. The list on the Ongoing screen identifies participants actively 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

Section	Description
Encryption	Encryption is either enabled (True) or disabled (False)
Area	Area or areas assigned to the participant.