



▶ Polycom® CMA™ System
Web Scheduling Guide

Trademark Information



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

All other trademarks are the property of their respective owners.



Java is a registered trademark of Oracle and/or its affiliates.

Patent Information

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

End User License Agreement

Use of this software constitutes acceptance of the terms and conditions of the Polycom CMA system end-user license agreement (EULA).

The EULA is included in the release notes document for your version, which is available on the Polycom Support page for the Polycom CMA system.

© 2011 Polycom, Inc. All rights reserved.

Polycom, Inc.
4750 Willow Road
Pleasanton, CA 94588-2708
USA

No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Polycom, Inc. Under the law, reproducing includes translating into another language or format.

As between the parties, Polycom, Inc., retains title to and ownership of all proprietary rights with respect to the software contained within its products. The software is protected by United States copyright laws and international treaty provision. Therefore, you must treat the software like any other copyrighted material (e.g., a book or sound recording).

Every effort has been made to ensure that the information in this manual is accurate. Polycom, Inc., is not responsible for printing or clerical errors. Information in this document is subject to change without notice.

Contents

1	Polycom® CMA™ System Overview	1
	Working in the Polycom CMA System	1
	Log Into the Polycom CMA System	1
	Filter and Search Lists	2
	Change Your Password	4
	Log Out of the Polycom CMA System	4
	Scheduler Roles	4
	Scheduler Overview	5
	Conference Menu Overview	6
	Conference Menu and Views	6
	Conference Views—Future and Ongoing	7
	Conference States	8
	Context-Sensitive Conference Actions	9
	User Menu Overview	10
	User Menu and Guest Book	10
	Context-Sensitive Guest Book Actions	11
	Add a Guest to the System Guest Book	11
	Edit a Guest in the System Guest Book	13
	Delete a Guest from the System Guest Book	14
	General Scheduling Information	14
	Scheduling Participants and Endpoints	14
	Bridge Selection and Cascading	15
	Bridge Scheduling and Reassignment	16
2	Conference Scheduling Operations	17
	Add/Schedule a Conference	17
	Add/Schedule a New Conference	17
	Copy an Existing Conference	23
	Edit a Conference	23
	Edit a Participant's Settings	24
	View Scheduling Information for a Conference	26
3	Advanced Scheduling Operations	29
	Edit Conference Settings	29

Select a Bridge for a Conference	34
Create a Cascaded Conference Across Multiple Bridges	34
4 Conference and Participant Details	37
Conference Image	37
Conference Details	37
Conference Features	39
Bridge (MCU) Features	40
Participants List	41
Participant Details	42
Participant Settings	43
Index	45

Polycom[®] CMA[™] System Overview

This chapter provides an introduction to the Polycom[®] Converged Management Application[™] (CMA[™]) system video conference scheduling functionality and operation. It includes these topics:

- [Working in the Polycom CMA System](#)
- [Scheduler Roles](#)
- [Scheduler Overview](#)
- [Conference Menu Overview](#)
- [User Menu Overview](#)
- [General Scheduling Information](#)

Working in the Polycom CMA System

This section includes some general information you should know when working in the CMA system. It includes these topics:

- [Log Into the Polycom CMA System](#)
- [Filter and Search Lists](#)
- [Change Your Password](#)
- [Log Out of the Polycom CMA System](#)

Log Into the Polycom CMA System

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

- Microsoft Internet Explorer[®] 6.0, 7.0 or 8.0, Mozilla FireFox[®] 3.5 or 3.6, or Apple Safari 3.2, 4.0 or 5.0.

If your system is operating in maximum security mode, you may use only Microsoft Internet Explorer.

- Adobe[®] Flash[®] Player 9.x or 10.x

- The IP address or host name of the CMA system server and your username, password, and domain.



Note

The CMA system user interface is best viewed with an SXGA display resolution of at least 1280x1024 pixels. The minimum support display resolution is XGA 1024x768 pixels.

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

To log into a CMA system

- 1 Open a browser window and in the **Address** field enter the CMA system IP address or host name.
 - If prompted to install the Adobe Flash Player, click **OK**.
 - If you receive an **HTTPS Security Alert**, click **Yes**.
 - If you see a login banner, click **Accept** to accept the terms and continue.

If you cannot connect to the system, there may be certificate issues. Contact your CMA system administrator.

- 2 When the CMA system **Log In** screen appears, enter your **Username** and **Password**.
- 3 If necessary, select a different **Language** or **Domain**.
- 4 Click **Login**.

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

If you log in as an administrator, you see the CMA system **Dashboard**.

For more information about roles and the functionality associated with roles, see [“Default CMA System Roles and Permissions”](#) on page 253.

Filter and Search Lists

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

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

- If you select **Custom Date** as the filter, a calendar filter field appears

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

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

However, if the CMA system is integrated with an Active Directory (it is likely integrated if you logged in with your enterprise network login and password), the CMA system uses the LDAP search function for searches of the directory. LDAP searches are prefix-searches that include an appended wildcard. In this case, when you enter a search string, the system looks for that search string only at the beginning of the indexed fields.

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

```
Barbara
Smi the
Bar
Smi
```

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

The attributes include:

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

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

```
Sn
Gi venname
Mai l
Ou
Obj ectgui d
Tel ephonenumbe r
Cn
Samaccountname
Memberof
Di spl ayname
Obj ectcl ass
Ti tle
Loc al i tyName
department
```

Change Your Password

For local users, CMA system password requirements (for example, password length and password age) are managed by the CMA system administrator. For enterprise users, CMA system password requirements are managed by Microsoft Active Directory.

Contact your CMA system administrator if you have questions about your company's specific password requirements.

To change your system password

- 1 Click **Settings** in the top-right corner of the page.
- 2 In the Settings dialog box, click **Change Password**.
- 3 Enter your **Old Password**.
- 4 Enter a **New Password**.
- 5 Confirm the new password and click **OK**.

Log Out of the Polycom CMA System

To log out of the Polycom CMA system

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

Scheduler Roles

Using the CMA system web scheduling interface or one of the Polycom Scheduling Plugins, users assigned the default **Scheduler** and **Advanced Scheduler** roles can create one-time or recurring conferences in a manner similar to other calendar applications.

As a scheduler, 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 have more options when scheduling conferences. As an advanced scheduler, you can:

- Edit some conference settings
- Assign a conference lecturer or chairperson

- Select a bridge for your conferences
- Create mulMtibridge, cascaded conferences

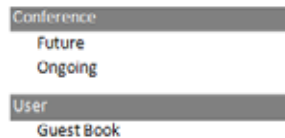


Note

If your system is operating in maximum security mode, some system features may not be available.

Scheduler Overview

As a scheduler, when you log into the CMA system, the system displays the **Future** conference page and you have access to the following menu items:



You may also see these menu items:

Description
<p>Settings. Click here to display a Settings dialog box with the following information:</p> <ul style="list-style-type: none"> • User Name • Remote Server IP Address • Software Version • Font Size <p>In this dialog box, you can also:</p> <ul style="list-style-type: none"> • Change the font size used in your display of the CMA system web interface. • Change your password, if you are a local system user.
<p>Downloads. Click here to display the Downloads dialog box with the downloadable applications compatible with the CMA system. Downloadable applications may include:</p> <ul style="list-style-type: none"> • Polycom CMA Desktop PC or MAC client (including the path to the application) • Polycom Scheduling Plugin for Microsoft Outlook • Polycom Scheduling Plugin for IBM Lotus Notes
<p>Log Out. Click here to log out of the CMA system.</p> <p>Note</p> <p>The CMA system has an inactivity timer. If you are logged into the system but do not use the interface for a specified period of time (10 minutes by default), the system automatically logs you out.</p>
<p>Help. Links to the CMA system online help.</p>

As a scheduler, 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 default **Advanced Scheduler** role have more options when scheduling conferences. As an advanced scheduler, you can:

- Edit some conference settings
- Assign a conference lecturer or chairperson
- Select a bridge for your conferences
- Create multibrige, cascaded conferences

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 States](#)
- [Context-Sensitive Conference Actions](#)

Conference Menu and Views

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

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

The **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 display with current information. • Add  —Use this command to create a new video and/or audio conference.
Conference List	The context-sensitive Conference list for the selected view.

Section	Description
Conference Details	Displays information about the selected conference. For more information, see “Conference Details” on page 37.
Conference Features	Displays the status of system features for the selected conference. For more information, see “Conference Features” on page 39.
Bridge (MCU) Features	Displays the status of MCU features for the selected conference. For more information, see “Bridge (MCU) Features” on page 40.
Participants	Displays the list of participants for the selected conference. For more information, see “Participants List” on page 41.
Participant Details	Displays information about the participant selected in the Participants list. For more information, see “Participant Details” on page 42.

Conference Views—Future and Ongoing


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






Field	Description
Filter	<p>Use the filter to display other views of the conference list, which include:</p> <ul style="list-style-type: none"> • Future Only - Displays scheduled conferences that have not yet started • Today Only - Displays scheduled conferences (completed, active, or future) for the current day and active ad hoc conferences • 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 Owner, Conference Name, Endpoint Name, and Bridge. • Today Plus - Displays scheduled conferences (completed, active, or future) for the current day, current ad hoc conferences, and all future conferences. You can further filter this request by Owner, Conference Name, Endpoint Name, and Bridge. • Yesterday Plus - Displays completed scheduled conferences for yesterday and earlier. You can further filter this request by Owner and Conference Name. <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>

Field	Description
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” on page 8.
Type	The type of scheduled conference. Possible values include: <ul style="list-style-type: none"> • Video Conference  —All conference participants have video endpoints. • 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. • Multi-Bridge Conference —The scheduler assigned the conference to multiple bridges and created bridge links.
Conference Name	The system- or scheduler-assigned name of the conference. By default, the system assigns a conference name and appends the day and date to that name. The scheduler can change the system-assigned name.
Start Time	The user-assigned start time for the conference. The system appends the time difference between the local time and the standard time.
Bridge	If applicable, the user-assigned bridge for the conference. Possible values are: <ul style="list-style-type: none"> • N/A—A bridge is not required for the conference. • <Bridge Name>—The user assigned the conference to a single bridge. In this case, the bridge name is displayed. • Multi bridge  —The user assigned the conference to multiple bridges and created bridge links.
Owner	The conference creator.

Conference States




Conferences may be in the following states.



State	Description
Future Conference 	Scheduled conference that has not yet started. This conference state is possible in all views except the Yesterday Plus view.

State	Description
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 (i.e., not all scheduled participants have joined the conference).
Declined Conference 	Applies only to conferences scheduled through the Polycom Scheduling Plugin for Microsoft Outlook. This state indicates that most participants did not accept the conference invitation. If your system is in maximum security mode, the Polycom Scheduling Plugin for Microsoft Outlook is not available.
Conference End Warning 	The conference is ending, i.e., it 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 the selected conference. For more information, see “Edit a Conference” on page 23.
Available for future and past conferences	
Delete 	Use this command to delete the selected conference.
Available for future, past, and active conferences	
Copy 	Use this command to copy the selected conference.

Action	Description
Available for active 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” on page 69.
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 Book](#)

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.

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

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

To add a guest to the system Guest Book

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

Field	Description
First Name	The guest's first name.
Last Name	The guest's last name.
Email	The guest's E-mail address. The system only validates the structure of the E-mail address.

Field	Description
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 box you will need to complete.
Join Mode	Specify whether the guest's endpoint is an audio or video endpoint. Note A guest may have multiple endpoints. Create a separate Guest Book entry for each endpoint.
Dial Options	Specify whether the guest will dial into conferences, or require that the system dial out to the guest. Note To support both options, create a separate Guest Book entry for each.

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 <ul style="list-style-type: none"> 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 CMA 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 CMA 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 CMA 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

To edit a guest in the system Guest Book

- 1 Go to **User > Guest Book** and select the guest of interest.
- 2 Click **Edit Guest**.

- 3 Change the **Guest Information** section and endpoint information sections of the **Add New Guest** dialog box, as needed. For more information about these fields, see [“Add a Guest to the System Guest Book”](#) on page 11.
- 4 Click **OK**.

Delete a Guest from the System Guest Book

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

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

General Scheduling Information

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

- [Scheduling Participants and Endpoints](#)
- [Bridge Selection and Cascading](#)
- [Bridge Scheduling and Reassignment](#)

Scheduling Participants and Endpoints

When you schedule conferences, you select the participants you wish to join the conference from your endpoint directory. Depending on your system configuration, your endpoint directory may be the enterprise 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 CMA system, the system selects the participant's default endpoint. You can change to another endpoint by selecting it from the **Call Info** list or by editing the participant.

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

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

Bridge Selection and Cascading

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

Bridge Selection

When scheduling a 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.

Bridge Selection and Cascading Conferences

When scheduling a conference, users with the **Advanced Scheduler** role can select the **Multi Bridge** option to create cascading conferences.

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

Some reasons you may wish to create cascading conferences include:

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

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

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

Bridge Scheduling and Reassignment

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

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

Some notes about bridge reassignment:

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

Conference Scheduling Operations

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

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

Add/Schedule a Conference


Schedulers have two options for scheduling a new conference:

- [Add/Schedule a New Conference](#)
- [Copy an Existing Conference](#)

These options are discussed in the following topics.

Add/Schedule a New Conference

To add or schedule a new conference

- 1 Go to **Conference** > **Future** and click **Add** .
- 2 In the conference scheduling page, enter a **Conference Name** and set a conference **Start Date**, **Start Time**, and either an **End Time** or **Duration**.
- 3 To make the conference recurring:
 - a Click **Recurrence** and in the **Appointment Recurrence** dialog box, set:
 - » Recurrence frequency (**Daily**, **Weekly**, or **Monthly**)

- » Recurrence day (Sunday through Saturday)
- » Recurrence range (**Start** date and **End After** occurrences or **End by** date)

The maximum number of recurrences is 365.

b Click **OK**.

- 4** For an **Audio Only** conference, change the **Conference Type** to **Audio Only**.
- 5** To change the template, click **Default Template** or **Default Audio Template** and select a different template, if available.



Notes

- 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.

- 6** To add conference participants from the local directory or enterprise directory:
 - a** Enter all or part of a participant's **Last Name** or **First Name** into one of the name fields and click **Add Participants**.
The **Add Participants** dialog box appears with the list of participant names that meet your search criteria.



Notes

- Depending on the search domain, the search function may return different results. See "[Filter and Search Lists](#)" on page 2.
- 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 steps **a** and **b** to add all domain participants and then click **Close**.

- 7** To add a guest from the **Guest Book**:
 - a** Click **Add From Guest Book**.

- b** In the **Add From Guest Book** dialog box, select the guest of interest's name from the list.
The guest's name appears in the underlying **Selected Participants and Rooms** list.
 - c** Repeat step **b** to add all participants from the **Guest Book** and then click **Close**.
- 8** To add new guest participants (participants not available through the local directory, enterprise directory, or **Guest Book**):
- a** Click **Add Guest**.
 - b** Configure these fields in the **Add Guest** dialog box.

Field	Description
First Name	The guest's first name.
Last Name	The guest's last name. Note The system allows you to add multiple users with the same first and last name into the Guest Book .
Email	The guest's E-mail address. The system only validates the structure of the E-mail address. Note The E-mail field is ASCII only.
Location	The location of the guest's endpoint system. This is a free-form field that the system does not validate.
How will the participant join the conference	Specify how the participant will join the conference. <ul style="list-style-type: none"> • In Person —The participant will attend the conference by going to a room that is included in the conference or joining another participant who is attending the conference. • Audio Only —The participant will attend the conference by telephone. The system will either call out to the participant or the participant will dial in. • Use Video—The participant will attend the conference using a video endpoint system. The system will either call out to the participant or the participant will dial in. This selection will in part determine what other fields of the Add Guest dialog box you will need to complete.
Bit Rate	(Video only) Set as required. You can change the connection speed for an endpoint up to the maximum speed specified by the conference template.

Field	Description
Dial Options	Specify whether the guest will dial into the conference or require that the system dial out to the guest.
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 box you will need to complete.

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

Field	Description
Number and Number Type	The specific dial string for the guest, and the format of the number that the MCU must resolve to contact the guest. This may be an IP address, E.164 address, H.323, or Annex-O. For Annex-O dialing, in the Number field enter the H. 323. al i as@I P, for example: <ul style="list-style-type: none"> 1001@11. 12. 13. 14 1001@domai n. com username@domai n. com username@11. 12. 13. 14 <p>Notes</p> <ul style="list-style-type: none"> Polycom endpoints must register with a gatekeeper before they will attempt an Annex-O call. You can enter a dial string for another MCU as a guest. If so, you may need to specify the conference ID in the Extension field also.
Extension	Use this field to connect the conference to another conference on another MCU. In this field, specify the conference ID or passcode for the conference on the other MCU.
MCU Service	Choose from the list of MCU services defined on the MCUs with which the CMA system is registered. Leave this at Any Available Service unless you have specific knowledge of MCU services.

d 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.

Field	Description
MCU Service	Choose from the list of MCU services defined on the MCUs with which the CMA system is registered. Leave this at Any Available Service unless you have specific knowledge of MCU services.

- e 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 CMA system has registered. Leave this at Any Available Service unless you have specific knowledge of MCU services.

- f Select **Save to Guest Book** to have this guest participant added to the system **Guest Book**.
- g Click **OK**.
The guest's name appears in the **Selected Participants and Rooms** list.
- 9 Adjust the conference date and time as needed to match participant and endpoint availability.
- a Review their availability and adjust the conference date and time as needed.



Notes

- For participants who are associated with endpoints, the CMA 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.

b To edit a participant's dial settings, select the participant from the **Selected Participants and Rooms** list and click **Edit**. For more information on editing participants settings, see "[Edit a Participant's Settings](#)" on page 24.

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

a Click **Select Site**.

b Select the site of interest from the site list

The conference room list for the selected site appears.

c Select the conference room of interest from the list.

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

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

11 If you have the **Advanced Scheduler** role, now is the time to assign conference leadership roles, edit conference settings, and make bridge selections. For more information, see "[Advanced Scheduling Operations](#)" on page 29.

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

13 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**.

14 To exit without sending an E-mail to participants, click **Skip Email**.

15 To send an E-mail notification to participants:

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

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

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

c Click Send.


The system sends the conference notification E-mail. The **Future** view appears. The conference appears in the conference list.

The E-mail that the CMA system sends can be read by E-mail systems that accept plain text E-mails, iCal attachments, or vCal attachments.

Copy an Existing Conference

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

To copy a conference

- 1 Go to the appropriate conference view.
- 2 Select the conference of interest and click **Copy** .
- 3 If you used a template other than the default when you created the conference, reselect the template.
- 4 Make the required changes to the conference date, participants, rooms, or other settings. For information on performing these tasks, see [“Add/Schedule a Conference”](#) on page 17.
- 5 When finished, click **Schedule**.


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

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

Edit a Conference

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

To edit a future conference

- 1 Go to **Conference > Future**.
- 2 Select the conference of interest and click **Edit** .
- 3 If you select a recurring conference, a dialog box appears asking if you want to edit all conferences in the series or just the selected one. Make the appropriate choice and click **Edit**.

The conference scheduling page appears.

- 4 To change the template, click **Default Template** or **Default Audio Template** and select a different template, if available.



Notes


- 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 [“Add/Schedule a Conference”](#) on page 17.
- 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 to your participants, click **Skip Email**.
- 8 To send an updated E-mail to your participants:
 - a Copy additional people on the notification and/or add notes about the conference.
Note that the **To**, **CC**, and **BCC** fields are ASCII only.
 - b Click **Send**.
The system sends the updated conference notification E-mail. The **Future** view appears. Your conference appears in the conference list.

Edit a Participant’s Settings

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

To edit a participant’s settings

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

- 3 If you select a recurring conference, a dialog box appears asking if you want to edit all conferences in the series or just the selected one. Make the appropriate choice and click **Edit**.
- 4 In the conference scheduling page, select the participant of interest from the **Selected Participants and Rooms** list and click **Edit**.
- 5 In the **Edit Participant Settings** dialog box, edit the participant settings as required.
 - a If the guest has an **H.323 (IP)** endpoint, configure these settings:

Field	Description
Number and Number Type	<p>The specific dial string for the guest, and the format of the number that the MCU must resolve to contact the guest. This may be an IP address, E.164 address, H.323, or Annex-O.</p> <p>For Annex-O dialing, in the Number field enter the H. 323. al i as@I P, for example:</p> <ul style="list-style-type: none"> • 1001@11. 12. 13. 14 • 1001@domai n. com • username@domai n. com • username@11. 12. 13. 14 <p>Notes</p> <ul style="list-style-type: none"> • Polycom endpoints must register with a gatekeeper before they will attempt an Annex-O call. • You can enter a dial string for another MCU as a guest. If so, you may need to specify the conference ID in the Extension field also.
Extension	Use this field to connect the conference to another conference on another MCU. In this field, specify the conference ID or passcode for the conference on the other MCU.
MCU Service	Choose from the list of MCU services defined on the MCUs with which the CMA system is registered. Leave this at Any Available Service unless you have specific knowledge of MCU services.

- b 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.

Field	Description
MCU Service	Choose from the list of MCU services defined on the MCUs with which the CMA system is registered. Leave this at Any Available Service unless you have specific knowledge of MCU services.

- c 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 CMA system has registered. Leave this at Any Available Service unless you have specific knowledge of MCU services.

- 6 Click **OK**.

View Scheduling Information for a Conference

To view the scheduling information for a conference

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

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

Section	Description
Start Date	The date on which the conference started or will start.
End Date	The date on which the conference is scheduled to end.
Duration	The scheduled duration of the conference in hours and minutes.
Recurrence	The recurrence information for the conference.
Owner	The person who scheduled the conference.
Type	The type of conference as identified by an icon. Hover over the icon to determine the conference type.
Conference Passcode	The conference passcode assigned to the conference. For future conferences, users with the Advanced Scheduler role can change this conference password. See "Edit Conference Settings" on page 29.
Chairperson	Whether or not the conference has a chairperson. This field will include a participant's name or N/A. For future conferences, users with the Advanced Scheduler role can assign a conference chairperson. See "Edit Conference Settings" on page 29.
Participants List	Information for the participant, including <ul style="list-style-type: none"> • Name • Dial Mode • Participant Type • Access • Endpoint

- 3 Click **Back to List** to return to the conference list.

Advanced Scheduling Operations

This chapter describes how users with the **Advanced Scheduler** role have more options when scheduling conferences using the Polycom® Converged Management Application™ (CMA™) system.

When scheduling conferences, advanced schedulers can:

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

Edit Conference Settings

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



Note


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

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

To edit the conference settings

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

Setting	Description
Conference 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 CMA 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>
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 9- 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. • If a conference is scheduled on a Polycom RMX system and the RMX profile has Conference Requires Chairperson selected but the template does not, and the conference is scheduled without a chairperson, then all users will remain in the waiting room and will not be able to join the conference. • 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
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 allows 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</p> <p>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.</p>
Always Use MCU	<p>This setting forces the conference to an MCU and prevents video endpoints from connecting to each other directly. This setting is automatically selected and cannot be changed when Audio Only is the conference type or when Enable Chairperson is selected.</p>
Video Mode	<p>Determines the initial layout on a video endpoint's monitor for a multipoint conference that requires an MCU. The options are:</p> <ul style="list-style-type: none"> 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. <p>The available layouts are Continuous Presence settings.</p>
Bit Rate	<p>Specifies the maximum connection speed for endpoints in the conference. Individual endpoints that specify a lower connection speed connect at that lower speed. Endpoints that specify a higher connection speed connect at the speed identified in the conference template.</p> <p>If you select a higher speed than an endpoint can support, the system reduces the speed that endpoint; however, the conference uses the default connection speed for endpoints that can match it. If you place the calls through an endpoint with an embedded MCU, the behavior depends on the capabilities of that endpoint.</p>

Setting	Description
<p>Bit Rate (continued)</p>	<p>When the dial speed is higher than the number of channels defined in the H.320 service for the endpoint, you receive a warning. To continue, lower the dial speed to less than or equal to the ISDN capability of the endpoint.</p> <p>Higher speed is important for high-quality video in a conference. Because higher speeds use greater bandwidth, scheduling a high-bandwidth conference may limit the number of conferences that you can reserve at one time.</p>
<p>People + Content</p>	<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. • Visual Concert PC. Select this option for use with Polycom ViewStation MP/512/SP/323 endpoints. • Visual Concert FX. Select this option for use with Polycom ViewStation FX/EX and VS4000 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.

Setting	Description
T.120 Mode	<p>For MGC-hosted conferences only, selects the protocols and specifications for multipoint data communication.</p> <p>If your system is in maximum security mode, the T.120 options are not supported.</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. Allows two or more participants to work on the same document or application, even when only one participant has the application. In application sharing, one participant launches the application, and it runs simultaneously on all other computers. • File Transfer. Enables participants to send files to each other. • Chat or Whiteboard. Allows participants to communicate with each other by writing. <p>In all of these modes, participants can view and hear each other.</p>

- 3 If the conference is configured for **Chairperson** or **Lecturer** modes, assign participants leadership roles:
 - a To assign a participant the lecturer role, in the **Lecturer** field select the participant's name from the list.
 - b To assign a participant the video chairperson role, in the **Video Chairperson** field select the participant's name from the list.



Notes

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

- 4 Continue on to [“Select a Bridge for a Conference”](#) on page 34, as required, or return to adding or editing the conference, as described in [“Conference Scheduling Operations”](#) on page 17.

Select a Bridge for a Conference

By default when scheduling a conference, the CMA system will automatically select a bridge for the conference. However, users with the **Advanced Scheduler** role can select a specific bridge for a conferences.

To select a single bridge for a conference

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

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

- 2 From the MCU list, select a specific MCU to host the conference.
- 3 Continue on to [“Create a Cascaded Conference Across Multiple Bridges”](#) on page 34, as required, or return to adding or editing the conference, as described in [“Conference Scheduling Operations”](#) on page 17.

Create a Cascaded Conference Across Multiple Bridges

Users with the **Advanced Scheduler** role can create cascaded conferences.

To create a cascaded conference across multiple bridges

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



Note

If the **Multi Bridge** option is not available, then the system is not configured to support this option.

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

- 2 Click **Manual Cascade**.

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

In the **Selected Bridge Availability** section, the system shows a count of the available ports on the available bridges for the specified time period.

If the port count is within 5% of the maximum ports available, it is displayed in red.

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



Note

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

- 4 When you've completed all bridge assignments, click **Next**.
The **Bridge To Bridge Links** dialog box displays a graphical view of the selected bridges.



Note

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

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

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



Note

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

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



Notes

- You can add links from a Polycom MGC system to a Polycom RMX system.
- There is no support for ISDN cascaded links on RMX MCUs.
- The lag time required to update cascaded links may cause more than one participant to hear the prompt about being the first person to join the conference.

- 8 Return to adding or editing the conference, as described in "[Conference Scheduling Operations](#)" on page 17.

Conference and Participant Details

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

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

Conference Image

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

Conference Details

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

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

Section	Description
Duration	For a scheduled conference, how long the conference is scheduled to last. For a completed conference, how long the conference actually lasted.
End Date/Time	The date and time the conference ended
Type	The type of conference. Possible values include: <ul style="list-style-type: none"> • Audio • Audio-Video
Status	The state of the conference. Possible values include: <ul style="list-style-type: none"> • Active • 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
Bit Rate	The rate (in kbps) at which to transfer the conference audio or video data
Schedule ID	System-assigned ID used for troubleshooting
Conf Monitoring ID	System-assigned ID used for troubleshooting
Video Layout	The video layout for the conference: Video Switching or Continuous.
Video Format	For a conference hosted on an MCU, the video format of the conference data stream. Possible values include: <ul style="list-style-type: none"> • Auto • CIF • QCIF • 4CIF • 16CIF • VGA • SVGA • XGA • NTSC
Video Protocol	For a conference hosted on an MCU, the video protocol of the conference data stream. Possible values include: <ul style="list-style-type: none"> • Auto • H.261 • H.263 • H.264

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

Conference 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.
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

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

Bridge (MCU) Features

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

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

Section	Description
Meet Me per Conf	Whether or not the a conference is a Meet Me conference, for which a dial-in number is assigned, so that undefined participants can connect to the conference
Conference on Port	(MGC only) Indicates whether or not the MGC is set to Conference on Port, which conserves bandwidth and ports. In this case, all participants are on a single video port and use the same connection speed and video format.
Message Service Type	Displays the type of messages participants joining the conference hear. Possible values are: <ul style="list-style-type: none"> • 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 List

The **Participants** section has these fields.

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

Participant Settings

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

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

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

Section	Description
Number	(H.323 and H.320 dial types) The participant's phone number
Extension	The specific dial string for the participant.
MCU Service	MCU service defined on the MCUs that the CMA system has registered.
Country	(H.320 dial type only) The country to which the system will dial out to the participant

Section	Description
Area/City Code	(H.320 dial type only) The area code to which the system will dial out to the participant
Use Modified Dial Number	(H.320 dial type only) Click this check box to add a specific prefix to the participant's phone number. The Number field becomes active
Number	(H.320 dial type only) The complete modified dial number as required to include PBX exit codes, dialing prefixes, or other installation-specific dial string requirements.
SIP URI	SIP dial type only) The SIP URI the MCU must resolve to contact the participant.

Index

A

active conference. *See* conference
 adding
 conferences 21
 Adobe Flash Player 3
 advanced conference settings
 editing 41
 assigning
 a lecturer 24
 a video chairperson 24
 audio-only conference 22, 26
 available commands, list of 12

B

bandwidth. *See* bit rate
 bit rate
 setting for guest participants 23, 28, 29, 34
 setting for internal participants 43
 bridge (MCU)
 features field names 52
 features, list of 12
 forcing use of 43

C

canceling
 conferences 39
 chairperson
 assigning 24
 enabling 42
 password for 42
 changing
 advanced conference settings 41
 conference information 25
 participant dial options 27
 participant endpoint settings 27
 room dial options 29
 room endpoint settings 29
 closing the CMA system 10
 commands
 conference 15
 Delete Conference 15
 Edit Conference 15
 list of 12
 Manage Conference 15
 Remove Participant 32, 36

 Send Message 32, 36
 Terminate Conference 15
 conference commands 15
 conference details
 conference details field names 49
 displaying 12
 conference features field names 51
 conference rooms
 adding 24
 setting dial options for 29
 setting endpoints for 29
 conference settings
 editing 41
 conference settings. *See* settings
 conferences
 assigning password for 42
 deleting 39
 features, list of 12
 list of conferences 12
 managing 31
 scheduling 21
 sending email notification for 25, 26, 47
 setting to audio only 22, 26
 setting to recurring 22
 connection speed
 setting for guest participants 23, 28, 29, 34
 setting for internal participants 43
 continuous presence mode 43
 creating
 conferences 21
 Custom Date filter 13

D

data plus video stream 44
 Delete Conference command 15
 deleting
 conferences 39
 deleting a conference 15
 details of conference, displaying 12
 devices, managing for participants 36
 dial options
 editing 27
 setting 43
 setting for guest participants 23, 28, 29

- dial type
 - setting for guest participants 23, 28, 29
- dial-in option 43
- dial-out option 43

E

- Edit Conference command 15
- editing
 - advanced conference settings 41
 - conference information 25
 - participant dial options 27
 - participant endpoint settings 27
 - room dial options 29
 - room endpoint settings 29
- email notifications 25, 26, 47
- enabling a chairperson 42
- endpoints
 - editing settings for 27
 - sending messages to 32, 36

F

- features
 - bridge (MCU) 12
 - list of conference 12
- field names
 - bridge (MCU) features 52
 - conference details 49
 - conference features 51
 - participant details 54
 - participant settings 56
 - participants 53
- fields
 - input requirements for 7
- filtering
 - overview of 7
- filters
 - Custom Date 13
 - Future Only 13
 - Ongoing Plus 13
 - Today Only 13
 - Today Plus 13
 - Yesterday Plus 13
- forcing MCU usage 43
- future conference view 11
- Future Only filter 13

G

- guest participants
 - adding 23
 - setting bit rate for 23, 28, 29, 34
 - setting dial options for 23, 28, 29

- setting dial type for 23, 28, 29

I

- input requirements for fields
 - requirements
 - for field inputs
 - ASCII-only fields 7

L

- lecturer, assigning 24
- lists
 - filtering, overview of 7
 - of bridge (MCU) features 12
 - of commands 12
 - of conference features 12
 - of conferences 12
 - of participant details 12
 - of participants 12
- logging into the CMA system 3
- logging out of the CMA system 10

M

- Manage Conference command 15
- managing
 - active conferences 31
 - participant devices 36
- MCU
 - features field names 52
 - forcing use of 43
 - list of features 12
- messages, sending 32, 36
- mode, T.120 45
- modes, video
 - continuous presence mode 43
 - setting 43
 - switching mode 43
- modifying
 - advanced conference settings 41
 - conference information 25
 - participant dial options 27
 - participant endpoint settings 27
 - room dial options 29
 - room endpoint settings 29

O

- Ongoing Plus filter 13

P

- participant field names
 - participant details field names 54
 - participant settings field names 56

participants
 adding guest 23
 list of 12
 list of, details 12
 managing devices for 36
 removing 32, 36
 setting endpoints for 27
participants field names 53
passwords
 for chairperson 42
 for conference 42
People + Content 44

R

recurring conferences 22
Remove Participant command 32, 36
removing
 conferences 39
removing a conference 15
requirements, system 3
rooms
 adding 24
 setting dial options for 29
 setting endpoints for 29

S

schedule conference view 11
scheduling a conference 21
Send Message command 32, 36
settings
 advanced conference settings 41
 chairperson password 42
 conference password 42

 connection speed 43
 dial options 43
 enable chairperson 42
 forced MCU usage 43
 People + Content 44
 T.120 mode 45
 video mode 43
starting the CMA system 3
switching mode 43
system login 3
system requirements 3

T

T.120 mode 45
Terminate Conference command 15
Today Only filter 13
Today Plus filter 13

V

video chairperson, assigning 24
video modes
 continuous presence mode 43
 setting 43
 switching mode 43
video plus data stream 44
views
 future conference view 11
 schedule conference view 11

Y

Yesterday Plus filter 13

