



VSX™ Series Getting Started Guide



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Contents

Using This Guide

System Basics

Using the Remote Control	2
Getting More Information	3

Calling and Answering

Answering a Call	3
Placing a Call	4
Ending a Call	6
Types of Calls You Can Make	6

Controlling What You See

Aiming the Camera	7
Setting and Using Camera Presets	8
Switching Between Full Screen and Home View	9
Showing, Moving, and Turning Off the PIP	9

Controlling the Sound

Adjusting Volume	10
Muting the Microphone	11

Sharing Content

What You See When You Share Content	11
Sharing Content from a Laptop or PC	11
Sharing Content from a Document Camera, VCR, or DVD	13

Working with Directory Entries

Adding, Editing, and Deleting Directory Entries	14
Categorizing Directory Entries	15

Including Multiple Sites in Calls

About Multipoint Calls	17
Placing a Multipoint Call	17
Supplying a Password for External MCU Calls	18

Changing the Way Calls Are Answered

Temporarily Refusing Calls	18
Answering Calls Automatically	19
Muting Automatically-Answered Calls	19

Customizing Your Workspace

Allowing the Far Site to Control Your Camera	20
Specifying When to Display the PIP	20
Displaying the Far Site's Name When the Call Connects	21
Hearing Audio Confirmation When You Dial	21
Adjusting for Strong Room Lighting	21

Collaboration Tips

Tips for Great Meetings	23
Tips for Great Video	23
Tips for Great Audio	23
Tips for Sharing Documents	24

The meetings you attend using the VSX™ system are much like meetings you attend in a physical conference room:

You see other people and you talk.

Depending on how your system is configured, you can make video calls to one or more sites using ISDN or IP connections.

You show various types of information to other participants and they show you information.

You can share many kinds of information from a variety of sources, including almost any type of document, media, or object. You can even use the system to share content with others in the same room when no call is in progress.

Using This Guide

Before you make your first call with your Polycom® VSX system, you may need this type of basic “how-to” information:

For information about how to...	See...
Answer a call manually or automatically	Answering a Call on page 3
Make a call by entering a number or by using the Directory	Placing a Call on page 4
Hang up from a call	Ending a Call on page 6

This guide also includes overview information that you may find helpful when you’re just starting to learn about the capabilities of the system or when you have experience, but you need a quick refresher.

The following table lists the sections that include this type of information:

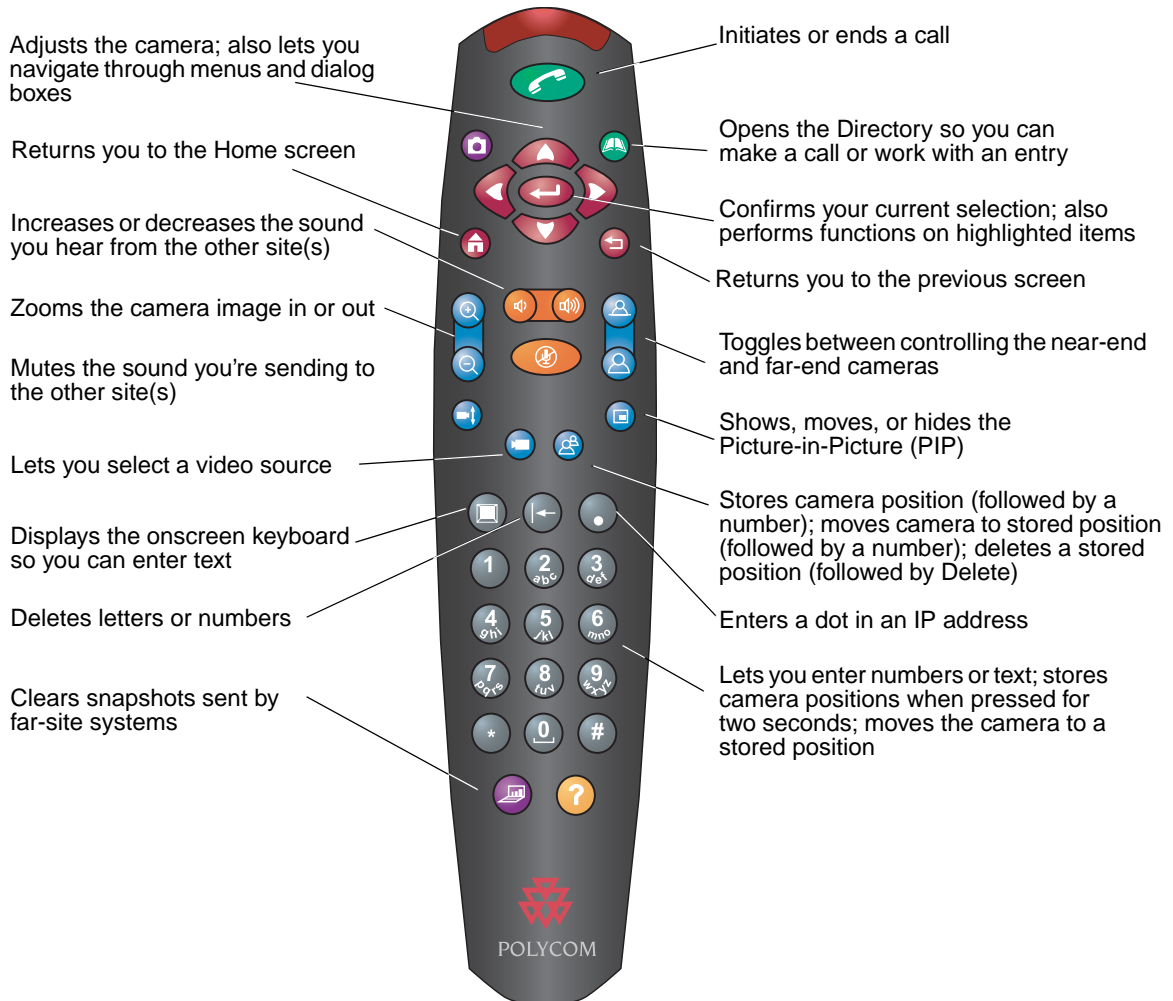
For information about how to...	See...
Use the remote control	Using the Remote Control on page 2
Adjust the cameras and PIP	Controlling What You See on page 7
Change the volume	Controlling the Sound on page 10
Show a document during a meeting	Sharing Content on page 11
Add an entry to the Directory	Working with Directory Entries on page 13
Place a call that includes multiple sites	Including Multiple Sites in Calls on page 16
Get the most out of videoconferencing	Collaboration Tips on page 23

System Basics

Using the Remote Control


The remote control lets you perform meeting tasks, such as placing a call and zooming the camera. You can use the remote control to navigate screens and select options.

You can also use the remote control to type text by pressing the number buttons using the text-entry method commonly used with cell phones. For example, to enter a “b”, press the number 2 button twice.



Getting More Information

If you need additional information about using the VSX system, try these resources:

- To view help while you're using the system, press .
- For system or network problems, contact your system administrator.


Calling and Answering

Answering a Call

When a call comes in, you hear a ringing sound, and you may see a message that includes the number of the person calling. If the person is listed in the Directory, you'll also see the person's name. The system administrator configures the system to answer incoming calls in one of these ways:

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



To answer the call manually:

>> When the system notifies you that a call is coming in, select Answer. Or, press  **Call-Hang Up** on the remote.

To answer the call when your system is set up to automatically answer calls:

>> You do not need to do anything. (The call connects automatically.)




If you see  **Near** on your screen, then your system is configured to automatically mute near-end audio when a call comes in. To unmute your system, press  **Mute**.

Placing a Call

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



- You can dial using a Directory, which is like picking a name from a phone book and having the system automatically dial the number for you.
- You can enter a name or number, which is somewhat like dialing an ordinary telephone.
- You can choose from a list of the numbers you've called recently.
- You can select a customized Contacts or Speed Dial button on the Place a Call screen, if your system administrator has configured the system to have one.

Using the Directory to Place a Call

The Directory is a list of names and numbers that's stored on the VSX system. If the system is registered with a global directory, the Directory also includes entries from the global directory. Global entries are marked with . For both types of entries, the name appears with its corresponding number, IP address, or both.

When a call ends, you can save call information to the local Directory. This information is then available to all other users of the system. Depending on your system configuration, you can also remove or edit names or dialing information in the local Directory.

To place a call from the Directory:

1. Press  **Directory** on the remote control.
2. Spell the first or last name using the number buttons on the remote to go directly to an entry. Or, press  **Keyboard** to use the on-screen keyboard to spell the name.


You can also use the alphabet tabs to move through the Directory and then scroll to the name you want.

3. Press  **Call-Hang Up** to place the call.



You can set the Directory to show only local entries, global entries, or entries in a category you define. For more information, see [Categorizing Directory Entries on page 15](#).



To place a call by entering a name or number:

1. Enter the ISDN number (for example, 19875554321), the system name (for example, Aspen Conference Room), or the IP address (for example, 255.255.255.255) of the site you want to call. The system automatically determines the type of call to make based on the information you enter.
2. Enter any additional information needed for the call. The available settings depend on the type of call and your system's configuration. Not all calls require these settings:
 - **Call Quality** — Specify the bandwidth for this call. For most calls, choose Auto to let the system determine the best quality for the call.
 - **Second ISDN number** — Use two numbers only when the party you are calling instructs you to do so.
 - **Gateway extension** — If you need to dial an extension, enter the extension in the second entry field. If your system is not configured with a second entry field, you can enter the extension when the gateway prompts you.
3. Press  **Call-Hang Up** to place the call.
Call progress indicators appear on the screen to show that the call is in progress. When the indicators turn green, the call is connected.

Calling from the Recent Calls List

Depending on the way your system has been configured, you may be able to choose a number to call from a list of the sites you have called recently. The Recent Calls screen provides details of all incoming and outgoing calls, including the time of the calls.



To place a call from the Recent Calls screen:

1. Select the Recent Calls button and press .
2. Scroll to the entry you want to call.
3. Press  **Call-Hang Up** to place the call.

Calling from the Contacts or Speed Dial List


Your system administrator may have set up a customized Contacts or Speed Dial button to let you quickly access calling information for specific sites. When you place a call from this list, you choose from a list of names and numbers.

To place a call using the Speed Dial or Contacts button:

1. Select the **Speed Dial** or **Contacts** button and press .
2. Scroll to the entry you want to call.
3. Press  **Call-Hang Up** to place the call.

Ending a Call

To hang up from a call:

1. Press  **Call-Hang Up**.
2. Confirm that you want to end the call.



If you don't confirm that you want to hang up, the system disconnects the call automatically after 60 seconds.

Types of Calls You Can Make

You can make either ISDN or IP calls (or both) using the VSX system, depending on how your system administrator has configured the system. You can call systems on ISDN networks, on the same IP network as your system, or on a different LAN from your system. The network used by your system and the far-site system can affect how you dial the call.

From:	You can call:	By dialing:
ISDN	ISDN	Phone number
	IP	Phone number of the far-site gateway and the extension (E.164 address) of the far site. Enter the extension after the far site's number. Or, wait until the gateway prompts you for the extension and then use the remote to enter it.
LAN	Same LAN	Alias, E.164 address, or IP address
	Different LAN	Phone number of the far-site gateway and the extension (E.164 address) of the far site. Enter the extension after the far site's number. Or, wait until the gateway prompts you for the extension and then use the remote to enter it.
	ISDN	Phone number



When you call an IP system through a gateway that requires an extension (E.164 address), enter the extension in the dialing field whenever possible. By doing so, you will be given the option of saving both the number and the extension in the Directory when the call ends. If you enter the extension after the gateway connects, then you can save only the gateway number when the call ends.


Controlling What You See



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


Aiming the Camera

You use the remote control to adjust the main camera, as well as any auxiliary camera that supports pan, tilt, and zoom movement. If the far site is configured to allow it, you can also adjust the far-site camera. You cannot use the remote to control near-site or far-site content sources such as document cameras, laptops, or VCRs.

To aim a near-site or far-site camera:

1. If you are in a call, press  **Near** or **Far** to choose a camera to control. The icon on the screen indicates which site's camera is selected:

If you see this icon...	This video source is selected...
	Near-site source
	Far-site source

2. Press the arrow buttons to move the camera up, down, to the left, or to the right.
3. Press  **Zoom** to zoom out or in.

Setting and Using Camera Presets

Camera presets are stored camera positions that you can create ahead of time or during a call. With the press of a button, presets let you:

- Automatically point a camera at pre-defined locations in a conference room
- Show a content source such as a laptop, a VCR, a document camera, or an auxiliary camera

You can create up to 10 preset camera positions for the near site. Each preset stores the camera number, its zoom level, and the direction it points. Near-site presets remain in effect until you delete or change them.


If the far site allows you to control its cameras, you can also create presets to control the far-site camera. These presets are stored on your system and are not available to the far site. In addition, you may also be able to use presets that were created at the far site to control the far-site camera, provided that system is designed to use the industry standards for camera presets.



To view your presets:

>> Press  **Preset**.

Each numbered icon represents a preset. The colored icons indicate stored camera positions, and the gray icons indicate available presets.


To store a preset:

1. If a call is connected, press  **Near** or **Far** to choose a near-site or far-site video source. The icon on the screen indicates which is selected.




If you see this icon...	This video source is selected...
	Near-site source
	Far-site source

2. Adjust the camera or video input.
3. Press and hold a number from 0 to 9 to store the preset. Any existing preset stored at that number is replaced.

To move the camera to a preset:

1. If a call is connected, press  **Near** or **Far** to choose a near-site or far-site video source. The icon on the screen indicates which is selected.
2. Press a number from 0 to 9.

To delete all presets:

1. If a call is connected, press  **Near** or **Far** to choose a near-site or far-site video source. The icon on the screen indicates which is selected.
2. Press  **Preset**.
3. Press  **Delete** to delete all presets.



You cannot delete just one preset. Instead, set a new preset position for the preset you want to delete.

Switching Between Full Screen and Home View

Before the call connects, you see the near video in a small window on the Home screen. When the call connects, the system automatically shows the video in the whole screen, hiding Home view. You can switch between these views at any time, even during a call.

To see the video in the full screen:

>> Press  **Near**.

To see the Place a Call screen:

>> Press  **Home**.

Showing, Moving, and Turning Off the PIP




The Picture-in-Picture (PIP) gives you another view of your videoconference, so that your call is more like a face-to-face meeting. The view shown in the PIP changes automatically, depending on how the system is set up and what is

happening in the meeting. You can also exchange the view shown in the PIP with that shown in the main screen.



For example, during a call on a single-monitor system, the PIP displays what your main camera is sending to the far end. (This lets you adjust the camera if you need to.) If one of the sites in the call shows any type of content, the content appears in the main part of the screen, and the PIP changes to show the people at the far end.

During a call on a dual-monitor system, when the participants share content, the monitors show the far end and the content, and the PIP shows the near end.

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

- Press  **PIP** to turn the PIP on.
- While the PIP has a yellow border, press  **PIP** repeatedly move it to a different corner of the screen.
- After a brief pause, the PIP border turns blue. Then, press  **PIP** to turn the PIP off. The PIP setting remains in effect until you change it or the system is restarted.

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

1. If the PIP is not showing, press  **PIP** to turn it on.
2. Press  **Camera** and select the Swap PIP icon.

Controlling the Sound

Adjusting Volume

During a call, you use the remote control to raise or lower the volume of the sound you hear. Changing the volume affects only the sound you hear at your site.


To adjust the volume:

- >> Press  **Volume**.

Muting the Microphone

You can mute the microphone if you do not want the far site to hear what you say. For example, you might mute the microphone if you have a side conversation.

To mute or unmute the microphone:

>> Press  **Mute** on the remote. Or, press  on the microphone.

Sharing Content

During your meeting, you can show the far end:

- Any information on a laptop or PC
- A paper document or object using a document camera
- A videotape or DVD

You can share one type of content at a time, and you can easily switch to a different type of content if you need to. For example, you might show PowerPoint® slides from your laptop and then play a DVD. Participants at other sites can also share content. When another site begins sharing, their content replaces any content currently being viewed.

What You See When You Share Content

When you share content, everyone sees the content at the same time. If your conference supports Dual Images, you can see both the people at the far end and any shared content at the same time. This is possible because the system can send and receive two simultaneous sources of video.

In calls that do not support Dual Images, all participants see any shared content. In these calls, the system sends one video source and receives one video source. The site that initiated sharing sees both the far end (the video that is received) and the shared content (the video that is sent). The site receiving the shared content sees only the content, since it can only receive one video source at a time.

Sharing Content from a Laptop or PC

If your VSX system has a Visual Concert™ VSX device connected to it, you can attach a laptop or PC and share content that is stored on the computer. Because you

connect the Visual Concert VSX to the LAN, you can also share content from network locations.

When you share content from a laptop or PC, the far site sees just what you see on the computer screen.



For a smoother presentation, be sure your document is open and ready to share before you start.

To connect a laptop or PC:

1. Connect the laptop to a Visual Concert VSX device.




2. Check to be sure the laptop video is configured to use one of these supported configurations:

Visual Concert VSX		
640x480, 60 Hz	800x600, 60 Hz	1024 x 768, 60 Hz
640x480, 72 Hz	800x600, 72 Hz	1024 x 768, 72 Hz
640x480, 75 Hz	800x600, 75 Hz	1024 x 768, 75 Hz
640x480, 85 Hz	800x600, 85 Hz	1024 x 768, 85 Hz
		1280 x 1024, 60 Hz




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

To start sharing content from a laptop:

>> Press  on the Visual Concert.

To stop sharing content from a laptop:

>> Press  on the Visual Concert.



Sharing Content from a Document Camera, VCR, or DVD

Your system administrator may have configured your system to let you use a Document Camera, a VCR, or a DVD player to share content.



Before the call begins:

1. Make sure the document camera, VCR, or DVD player is connected and powered on.
2. Position your document or object in the document camera or insert the videotape or DVD.

To start sharing a document, object, videotape, or DVD:

1. Press  **Camera**.
2. Select a content source.
3. Press .

To stop sharing a document, object, videotape, or DVD:

1. Press  **Camera**.
2. Select the main camera.
3. Press .

Working with Directory Entries

The Directory on your VSX system stores dialing information that helps you make calls quickly and easily. When a site listed in the Directory calls your system, the system displays the name on the screen when the call comes in. If a site that calls

you is not listed in the Directory, you are prompted to save the information in the Directory when the call ends.

If your system is registered with a global directory server, your Directory contains two types of entries:

- Local entries:** Information about sites that you have added, sites that you have called, and sites that have called you. These entries are stored on this VSX system, and you can edit them. You can also assign local entries to categories to make it easier to find numbers. Local entries are available to anyone who uses this system.
- Global entries:** Information about other active sites that are registered with the same global directory server. These entries are stored on the global directory server, and you cannot edit them. You can make a local copy if you want to make changes.


Adding, Editing, and Deleting Directory Entries

You can create entries for point-to-point calls and multipoint calls and save them in the VSX system's Directory. Everyone who uses this system can use the entries you create, and you can use the entries created by others. You can also edit the information in any local entry. Users at other sites cannot access the local entries on your system.



When you make a call using an entry with both ISDN and IP dialing information, the system prompts you to choose which to use for the call.

To add a single-site entry to the Directory:



1. Press  **Directory**.
2. Select **New** and specify that this is an entry for one site.
3. Specify the following information:

In this field...	Enter this information...
Name	Name that will appear in the Directory list and in incoming call messages.
ISDN Number	ISDN Number to use for calling the site.
Call Quality	Quality to use for ISDN calls to the site.
IP Number	LAN address for the system.
Extension	The system's gateway extension.


In this field...	Enter this information...
Call Quality	Quality to use for ISDN calls to the site.
Phone Number	Optional contact information for other resources in the conference room.
Mobile Number	
Email Address	
Category	Designation to help you quickly find the number in the Directory.

4. Select **Save** to save the entry.


To add a multiple-site entry to the Directory:

1. Press  **Directory**.
2. Select **New** and specify that this is an entry for multiple sites.
3. Specify a speed for the call. Note that each call in the multipoint conference is placed at the same speed.
4. Add up to three numbers to this entry in either of these ways:
 - Enter a number manually and press  to add the number to the entry.
 - Use the Directory to add a site.
5. Select **Save** to save the entry.
6. Enter a name for this entry as you want it to appear in the Directory list.

To edit an entry:

1. Press  **Directory**.
2. Select a local entry and then select **Edit**.
3. Select **Save** to return to the Directory.




To delete an entry:

1. Press  **Directory**.
2. Select a local entry and then select **Delete**.



Categorizing Directory Entries

When you categorize your local entries, you can find calling information quickly by searching just the entries in a category instead of the whole directory.

To create a new category:

1. Press  **Directory**.
2. Select **Category**, and then press .
3. Select **Edit Category**.
4. Enter a category name.
5. Press  **Back** to save the new category.

To delete a category:

1. Press  **Directory**.
2. Select **Category**, and then press .
3. Select **Edit Category**.
4. Select the category name, and then select **Delete**.



When you delete a category, all entries in that category are deleted. If you want to keep these entries, be sure to assign them to a new category before you delete the old category.

Including Multiple Sites in Calls

You can use the VSX system to participate in multipoint conferences. During a multipoint conference, a multipoint conferencing unit (MCU) enables the video to switch to the various sites so that you can see and hear the participant who is

speaking. You can also share content in a multipoint call, just as you can in a point-to-point call.

About Multipoint Calls

The VSX system lets you make multipoint calls using an external MCU. If your system includes the internal MCU, you can also make multipoint calls with the VSX system. The type of MCU affects the conference as shown in this table:

This MCU:	Lets you include:	Supports these calls:	Lets you add sites:
Internal MCU	Up to 4 video sites, including this site	IP, ISDN, or both	Before the call begins and after call starts
External MCU	Number of sites allowed by the MCU	IP, ISDN, or both	Before call begins


For calls using the internal multipoint option, the VSX system can initiate the call or the other sites can call the VSX system to join the conference.

Placing a Multipoint Call


How you place a multipoint call depends on whether you're using the internal multipoint option or an external MCU. For calls using the internal multipoint option, you can define a multipoint Directory entry to call all of the sites at one time. Or, you can place a call, and then add other sites after the call connects.

If your call uses an external MCU, you may need to enter calling information about all of the sites before the call begins. Contact your system administrator for more information.

To place a multipoint call by adding sites to a call:

1. Call the first site.
2. When the call connects, press  **Call-Hang Up**.
3. Select **Add Call**, and place a call to the next site.
4. Repeat steps 2 and 3 until all sites are connected.

To place a multipoint call using a multisite Directory entry:


1. Press  **Directory** on the remote control.
2. Spell the entry name using the number buttons on the remote to go directly to an entry.

3. Press  **Call-Hang Up** to place the call.

Supplying a Password for External MCU Calls

External MCUs sometimes require you to enter a password in order to join a conference. For this type of call, you can configure the system to enter the meeting password for you.

To configure a meeting password:

1. Go to **System > User Settings**.
2. Select **Meeting Password**.
3. Use the remote control to type the password by pressing the number buttons using the text-entry method commonly used with cell phones.
4. Press  **Home** to save your change and return to the Place a Call screen.


Changing the Way Calls Are Answered

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


Temporarily Refusing Calls

If you do not wish to be disturbed by calls, you can refuse incoming calls for a specified amount of time. During this time, callers hear a busy signal, and you receive no notification about incoming calls. You can, however, make outgoing calls.

To temporarily refuse incoming calls:

1. On the Place a Call screen, select  in the lower right corner of the screen.
2. Select **On** to set Do Not Disturb.



While the system is not accepting calls, you see  in the lower right corner of the screen. This setting stays in effect until you change it or until the system is restarted.


Answering Calls Automatically

You can specify whether to answer calls automatically or to have the system announce incoming calls and wait for you to answer manually.




Automatically answering calls is convenient, but keep in mind that an unexpected caller could interrupt a meeting in progress or look at equipment and notes left in an empty room. To prevent incoming callers from overhearing a conversation not intended for them, you can choose to mute all automatically-answered calls.

To automatically answer calls:


1. Go to **System > User Settings**.
2. Select **Yes** to have the system to answer point-to-point and multipoint calls automatically.
3. Press  **Home** to save your change and return to the Place a Call screen.

Muting Automatically-Answered Calls

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

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

To mute automatically-answered calls:

1. Go to **System > User Settings**.
2. Specify whether you want the system to mute all automatically-answered calls.
3. Press  **Home** to save your change and return to the Place a Call screen.



Customizing Your Workspace

Your system administrator may have configured the system to let you customize what you see on the screen. These options can be changed before calls are placed and also when the system is in a call.

Allowing the Far Site to Control Your Camera

Allowing the far end to control your camera lets the other participants adjust what they see. Far-end participants can also set and use presets for your camera, if their system supports this.

To allow the far site to control your camera:

1. Go to **System > User Settings**.
2. Select the **Far Control of Near Camera** box and press  to check the box.
3. Press  **Home** to save your change and return to the Place a Call screen.





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


Specifying When to Display the PIP

You can specify how the PIP appears when the call connects. After the call connects, you can show, move, or hide the PIP, regardless of this setting.

To specify when to display the PIP:

1. Go to **System > User Settings** and then select .
2. Select **PIP**.
3. Press  and choose one of the settings shown in this table.

Choose this setting...	To show the PIP...
Auto	On connection and when you press any of the camera control buttons.
On	On connection and during the call.




Choose this setting...	To show the PIP...
Off	Only when you press  PIP.
Remote	When you pick up the remote.

4. Press  **Home** to save your change and return to the Place a Call screen.

Displaying the Far Site's Name When the Call Connects

With this option, you can specify whether to display the far site's name when the call connects and how long to leave the name on the screen. You can also choose not to display the far site name.




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

1. Go to **System > User Settings** and then select  to see more settings.
2. Select the **Far Site Display Time** box and press  to display the far site's name during the entire call, for a specified time, or not at all.
3. Press  **Home** to save your change and return to the Place a Call screen.

Hearing Audio Confirmation When You Dial

You can set up the system to speak each digit as you enter it on the Place a Call screen.

To enable audio confirmation:

1. Go to **System > User Settings** and then select  to see more settings.
2. Select **Keypad Audio Confirmation** and press  to check the box.
3. Press  **Home** to save your change and return to the Place a Call screen.



Adjusting for Strong Room Lighting

You can use the backlight control to adjust the brightness of the video that the main camera sends to the VSX system. Brightness controls adjust the camera's iris to take in less light. In most situations, you do not need to use the Backlight Compensation setting. However, adjusting brightness can be helpful when the room arrangement results in strong light coming from behind the people in the picture.



Because brightness controls adjust the main camera, these controls will not make content from a laptop or a Document Camera appear brighter.

To turn backlight compensation on or off:

1. Go to **System > User Settings**.
2. Select the **Backlight Compensation** box and press  to enable or disable compensation.
3. Press  **Home** to save your change and return to the Place a Call screen.

Collaboration Tips

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

Tips for Great Meetings

- Make sure you have the video number(s) of the site you want to call or that the site is listed in a Directory.
- Set your camera presets before you start your call so that you can quickly use them during the call. (You can set up to ten near-end presets. Depending on the system you call, you may also be able to use the presets stored on the far-end system.)
- Add peripherals to your system to expand its use. For example, you can add a VCR if you want to show a videotape, or you can add the Visual Concert VSX to connect a laptop or desktop PC if you want to share data.

Tips for Great Video

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

Tips for Great Audio

- Place the microphone on the table in front of the people in the meeting. If your room is very large, consider adding another microphone.
- Speak in your normal voice without shouting.
- Ask the people at the other site if they can hear you. Have them introduce themselves so you can be sure that you can hear them.

- Since the audio has a very slight delay, you may want to pause briefly for others to answer you or to make comments.
- Don't place papers or other objects on or in the way of the microphone, and don't rustle papers or tap on the microphone or table.
- As with any meeting, try to limit side conversations.

Tips for Sharing Documents

- Attach a laptop or a desktop PC to your system (if your system includes the Visual Concert VSX). You can then show documents that are stored on the laptop or PC to the other people in the conference.
- Check that your system has the application you need to share your documents, such as Microsoft® PowerPoint®, Project, or Word.