Getting Started Guide for the VSX Series

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

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Getting Started Guide for the VSX Series

Version 8.7

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

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

This guide covers instructions for the following models:

VSX™ set-top systems	VSX component systems	VSX 3000 executive desktop systems

Using the Remote Control

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

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

VSX Series Remote Control

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Calling and Answering

Answering a Video Call

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

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

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.

To answer the call manually:

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

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

Placing a Video Call

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

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

Calling by Entering a Name or Number

To place a call by entering a name or number:

1. In the dialing field, enter the dialing information. Depending on the capabilities of your system and the system you are calling, the dialing information will look like one of these samples:
   - 10.11.12.13 (IP address—include the dots)
   - 2555 (E.164 extension)
   - AscotRoom (H.323 name)
   - stereo.polycom.com (DNS name)
   - 19782922854 (ISDN number)

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 call rate (network speed) or call type 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 person you are calling instructs you to do so.
   - **Extension** – If you need to dial an extension (E.164 address), 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. You can also specify characters in the dial string as instructed by the system administrator.
3. Press **Call** on the remote control to place the call.

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

Calling from the Recent Calls List

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

To place a call from the Recent Calls screen:

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

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

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

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Calling from the Contacts or Speed Dial List

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

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

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

Calling from the Directory

The directory is a list of sites stored locally on the Polycom system. If the system is registered with a global directory, the directory also includes entries from the global directory.

To place a call from the directory:

1. Press **Directory** on the remote control.
2. Find the entry to call.
3. Press **Call** to place the call.

Depending on your system configuration, when you make a call using an entry with both ISDN and IP dialing information, the system may prompt you to choose which way to place the call.

Ending a Video Call

To hang up from a call:

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

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

When hanging up, the system may prompt you to save the dialed number to the local directory.

Types of Calls You Can Make

Depending on your system configuration, you may be able to make calls using ISDN, IP, or V.35.

The following table lists some possible call combinations.

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 gateway number or wait until the gateway prompts you for the extension.
LAN	Networked and Public Sites	Alias, E.164 address, DNS name, or IP address.
	Protected and Private Sites	Typically, the far site's gateway number then the number of the far-site system. Consult with the far site about the best method for placing the call.
	ISDN	Access code of the near-site gateway, the selected speed code, and the ISDN number of the far site.

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. Check with your network administrator for the extension delimiter you will need to enter into the dialing field. For example, some networks use ## to separate the extension from the IP address.

When you include the extension, 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.

Placing Audio-only Calls and Adding Audio-only Sites

You may be able to use your Polycom system to place an audio-only call or add an audio-only call to a video conference.

Other audio options are available if your conference room has a Polycom system integrated with a SoundStation VTX 1000® conference phone.

For more information about using the SoundStation VTX 1000 conference phone, see Using the SoundStation VTX 1000 Conference Phone in Video Calls on page 37.

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Placing an Audio-only Call

You can place an audio-only call from Polycom systems that have Analog Phone or Voice Over ISDN enabled.

To place an audio-only call from your system:

1. On the Place a Call screen, enter the number you want to call. To delete a digit, press **Delete** on the remote control.
2. Press **Call** to place the call.

Adding an Audio-only Call to a Video Call

You can add an audio-only call from Polycom systems that have Analog Phone or Voice Over ISDN enabled.

To add an audio-only call after your video call connects:

1. Press **Call** on the remote control.
2. Select **Add Call**.
3. Use the number buttons on the remote control to enter the telephone number of the audio participant that you want to add to your video conference.
4. Specify the Call Type, if applicable.

The available settings depend on your system's configuration. Not all calls require setting the call type.

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

Adding a Video Call to an Audio-only Call

If you are already in an audio-only call, you can add a video call to your call.

To add a video call after your audio-only call connects:

1. On the Place a Call screen, enter the number you want to call.
2. Press **Call** to place the call.

Ending an Audio-only Call

To hang up from an audio-only call:

1. Press **Hang Up** on the remote control.
2. Select the audio-only site from the Hang Up screen to hang up the call.

If the person on the telephone hangs up first, you need to disconnect the call from the Polycom system, just as you would hang up a telephone receiver in a regular phone call.

Controlling What You See

Selecting and Adjusting a Camera or Other Video Source

You can use the remote control to select the main camera or any other near-site or far-site video sources, such as document cameras, computers, VCRs, or DVD players. You can also use the remote control to adjust the main camera on Polycom systems. If you have a VSX 3000 system, you must pan, tilt, and focus the main camera manually. You may be able to adjust other auxiliary cameras or far-site cameras that support pan, tilt, and zoom movement.

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

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

1. If you are in a call, press **Near** or **Far** to select either near-site or far-site control.

	This onscreen icon indicates that you can control a near-site camera or video source.
	This onscreen icon indicates that you can control a far-site camera or video source.

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

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To adjust a camera using the remote control:

1. Press **Near** or **Far** to select either near-site or far-site control. During a multipoint call being hosted by a system in the call, you can only adjust a camera at the far site that is currently speaking.
2. Press the **Up**, **Down**, **Left**, and **Right** arrow buttons on the remote control to move the camera up, down, left, or right.
3. Press **Zoom** to zoom out or in.

To open or close the privacy shutter on the VSX 3000 system:

➢ Move the slider to the right to close the privacy shutter, or to the left to open it. You can still make and receive calls when the shutter is closed, but the people at the far site cannot see you.

To adjust the camera focus on the VSX 3000 system:

➢ Focus the camera by turning the focus wheel:

Setting and Using Camera Presets

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

Presets allow you to:

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

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

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

To move the camera to a preset:

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

To view your near-site presets (VSX set-top and component systems):

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

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

To store a preset:

1. If you are in a call, press **Near** or **Far**, then choose a near-site or far-site camera or other video source.
2. If you selected a camera that supports electronic pan, tilt, and zoom, you can adjust the camera's position:
   - Press the arrow buttons on the remote control to move the camera up, down, to the left, or to the right.
   - Press **Zoom** to zoom the camera out or in.
3. Press **Preset** on the remote control.

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4. Press and hold a number to store the preset position. To store a double-digit preset, press the first digit quickly and hold the second number down. Any existing preset stored at the number you enter is replaced.

   The system uses preset 0 as the default camera position.

To delete all presets:

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

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

Switching Between Full-Screen Video and the Home Screen

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

To see the video in the full screen:

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

To see the home screen:

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

Enabling Dual Monitor Emulation

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

To enable Dual Monitor Emulation:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Select **Next** to see more settings.

4. Scroll to **Dual Monitor Emulation** and press on the remote control to enable the option.
5. Press **Home** to save your change and return to the home screen.

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

1. Near and far sites, same size, side by side
2. Far site big, near site small
3. Near site big, far site small
4. Near site, full screen
5. Far site, full screen

The last layout viewed is used for the next call.

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Showing, Moving, and Turning Off the PIP

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

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

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

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

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

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

Specifying When to Display the PIP

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

To specify when to display the PIP:

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

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

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

Enabling Automatic Camera Tracking (PowerCam Plus Only)

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

Automatic camera tracking is disabled when your site is muted, when the people at the far site are speaking, and when Polycom StereoSurround™ is enabled.

To enable automatic camera tracking to the speaker:

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

To enable automatic camera tracking to camera presets:

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

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

To disable automatic camera tracking to camera presets:

➢ Press **Auto** until you see "Automatic Camera Tracking Off."

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

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Controlling What You Hear

Adjusting Volume

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

To adjust the volume:

➢ Press **Volume**.

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

When the VSX 3000 system is in use for video conferencing, use the remote control to adjust the volume. When the VSX 3000 is in use as a monitor for your computer, use the VOL button on the front of the system to adjust the volume.

Muting the Microphone

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

To mute or unmute the microphone:

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

For Polycom systems that use a Polycom microphone, you can also mute the call by pressing on the microphone.

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

Enjoying Stereo Audio in Video Calls

If your video conferencing room is configured to use stereo sound, the left and right microphone inputs are configured during system setup. It is important that you do not move the microphones as this may detract from the stereo audio experience.

Stereo audio is only used in video calls of 256 kbps or higher.

Showing Content

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

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

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

To keep the call secure, content is automatically stopped when a site is added to the call.

Showing Content from a Computer

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

If you have the Polycom People+Content™ IP software application installed on your computer, you can show content from any Windows XP or Windows 2000 computer that is connected to the network.

Showing Content with People+Content IP

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

1. On a computer with Windows XP or Windows 2000, open a web browser and go to the Polycom web site at www.polycom.com/support/video.
2. Download and install the People+Content IP software.

To start showing content:

1. On the computer, start the Polycom People+Content IP application.
2. Enter the IP address or DNS name of your video conferencing system and the meeting password, if one is set.
3. Click **Connect**.
4. Open the content you want to show.

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5. Do one of the following:
   - Click in People+Content IP.
   - Press **Graphics** on the video conferencing system's remote control.

If you have multiple content sources connected to your Polycom system and you press Graphics on the remote control, you are prompted to select the content source to use.

If the shared content disconnects after five minutes and you receive a dialog box indicating that the five-minute People+Content IP demonstration has timed out, you must contact your Polycom sales representative to purchase a key code to activate the full version of People+Content IP on your system.

To stop showing content:

1. If the People+Content IP toolbar is minimized, maximize it by clicking the icon in the task bar.
2. Do one of the following:
   - Click in People+Content IP.
   - Press **Graphics** on the video conferencing system's remote control.

Points to note about People+Content IP:

- People+Content IP provides video-only content. No audio is shared.
- Only one computer at a time can be connected to a Polycom system.

Showing Content with a Visual Concert VSX or ImageShare II

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

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

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

To start showing content using a Visual Concert VSX:

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

For more information about using the Visual Concert VSX device, see the *Visual Concert VSX Quick Tips*, available at www.polycom.com/videodocumentation.

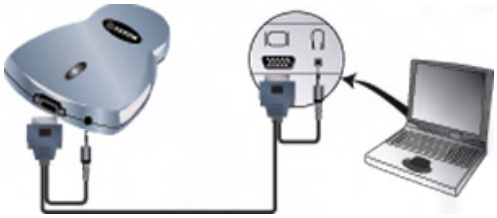
2. Press on the Visual Concert VSX, or press **Graphics** or **Camera** on the remote control.

To stop showing content using a Visual Concert VSX:

1. Press on the Visual Concert VSX.
2. Press **Graphics** or Camera on the remote control to choose another content source.

To show content using an ImageShare II:

1. Connect the computer to an ImageShare II:



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

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

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

Before the call begins:

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

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

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

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

1. Press **Camera** on the remote control.
2. Select the camera that is sharing the content.
3. Press on the remote control.

Working with Directory Entries

The directory on your Polycom 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 might be prompted to save the contact 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 have been added to the local system. These entries are stored locally on your Polycom system, and depending on your system setup, you can remove or edit these entries. You can also assign local entries to categories to make it easier to find numbers. Everyone at your site who uses the system can use the entries you create, and you can use the entries created by others. Users at other sites cannot access the local entries on your system.

- **Global entries:** Information about other active sites that are registered with the same Global Directory Server. These entries are managed from the Global Directory Server, and you cannot edit them. You can make a local copy if you want to make changes.

  Global entries are marked as available or offline.

Searching the Directory

You can find entries in the directory by:

- Spelling the first or last name using the number buttons on the remote control
- Pressing **Keyboard** to use the onscreen keyboard to spell the name
- Scrolling through the list of names using the **Up** and **Down** arrow buttons
- Using the alphabet tabs to move through the directory and then scrolling to the name you want
- Paging through the list of names using **Zoom In** and **Zoom Out**

Adding, Editing, and Deleting Directory Entries

You can create entries for point-to-point calls and multipoint calls and save them in the Polycom system's directory.

To add a single-site entry to the directory:

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

In this field...	Enter this information...
Name	Name that will appear in the directory list and on incoming call messages.
Number	ISDN number to use for calling the site, if applicable.
IP Number	IP address for calls to the site, if applicable.

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4. If desired, specify the following optional information:

In this field...	Enter this information...
Call Type	Call type to use for calls to the site. Depends on the capabilities of your system.
Call Quality	Call speed to use for ISDN calls to the site.
Extension	The system's extension (E.164 address).
Call Quality	Call speed to use for IP calls to the site.
Phone Number	Contact information for other resources in the conference room.
Mobile Number	
Email	
Category	Designation to help you quickly find the number in the directory.

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

To add a multiple-site entry to the directory:

1. Press **Directory** on the remote control.
2. Select **New** and specify that this is an entry for multiple sites.
3. Add numbers to this multiple-site entry in one of these ways:
   - Select entries from the directory.
   - Add entries manually.

   The number of sites that you can add depends on the capabilities of your system.
4. Specify a speed for the call. Note that each call in the multipoint conference is placed at the same speed.
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** on the remote control.
2. Scroll to the entry you want to edit.
3. Select **Edit**.
4. Edit the information as needed.
5. Select **Save** to save your changes and return to the directory.

To delete an entry:

1. Press **Directory** on the remote control.
2. Scroll to the entry you want to delete.
3. Select **Delete**.

You can only delete local directory entries. You cannot delete global directory entries.

Categorizing Directory Entries

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

To create a new group:

1. Press **Directory** on the remote control.
2. Select **Group**.
3. Select **Edit Groups**.
4. Enter a group name.
5. Press **Back** on the remote control to save the new group.

To delete a group:

1. Press **Directory** on the remote control.
2. Select **Group**.
3. Select **Edit Groups**.
4. Scroll to the group name you want to delete and then select **Delete**.

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

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To assign an entry to a group:

1. Press **Directory** on the remote control.
2. Scroll to the entry you want to assign to a group.
3. Select **Edit**.
4. Select **Next** and select the **Category**.
5. Select **Save** to save your changes and return to the directory.

Refreshing Global Directory Entries

The global directory entries are periodically refreshed on systems registered to the Polycom Global Directory Server. You can also manually refresh the global directory entries on your system.

To manually refresh global directory entries:

1. Press **Directory** on the remote control.
2. Navigate to the red Polycom logo in the top right corner of the screen.

   If you do not see a red Polycom logo in the top right corner of the screen, your system is not registered with the Polycom Global Directory Server. Contact your system administrator for more information.
3. Select the logo and choose **Refresh**.

Including Multiple Sites in Calls

Your system may be configured to participate in multipoint calls. During a multipoint call, multiple sites can see and hear each other. You can also share content in a multipoint call, just as you can in a point-to-point call.

Some systems, such as the VSX 5000 and VSX 6000, are not compatible with the optional embedded MPPlus Multipoint software. These systems can be used to participate as a site in a multipoint call but cannot initiate a multipoint call.

If the multipoint call disconnects after five minutes, the system that you are using may only have multipoint demonstration capabilities. For information about adding the full version of embedded MPPlus Multipoint software, contact your Polycom sales representative.

About Multipoint Calls

You can host multipoint calls using a video conferencing system with multipoint capabilities, or you can use a bridge such as the Polycom MGC™ or the Polycom RMX 2000™. The way a multipoint call is hosted affects the conference as shown in this table:

Hosted by...	Lets you include...	Supports these calls...
Video Conferencing System	Number of sites allowed by the system	• Any combination of IP, ISDN, V.35/Serial, and audio-only • Any combination of SIP, ISDN, V.35/Serial, and audio-only
Bridge	Number of sites allowed by the bridge	• Any combination of IP, SIP, ISDN, V.35/Serial, and audio-only

Placing a Multipoint Call

How you place a multipoint call depends on whether you're using a Polycom system with multipoint capabilities or a bridge such as the Polycom MGC.

- For calls hosted by a video conferencing system, you can define a multiple-site directory entry to call all of the sites at one time. Alternatively, you can place a call to the first site and then add other sites after the first call connects. The other sites can call the Polycom system to join the call.
- For calls hosted by a bridge, contact your system administrator for more information.
- VSX 3000, VSX 3000A, VSX 7000, VSX 7000s, and VSX 7000e systems with optional multipoint capabilities can host multipoint calls that include up to four video sites, plus one audio site. The VSX 8000 provides multipoint support for calls that include up to six video sites, plus one audio site.

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

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

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To place a multipoint call using a multiple-site directory entry:

1. Press **Directory** on the remote control.
2. Find the multiple-site entry in the directory list.
3. Press **Call** to place the call.

To place a cascaded multipoint call:

1. Place a multiple-site call from the directory, or place calls one at a time to several other sites.
2. Ask each site to call additional sites.

You can connect up to 10 sites total through placing a cascading multipoint call.

Supplying a Password for Bridge Calls

Bridges such as the Polycom MGC sometimes require you to enter a password in order to join a conference. Depending on your system configuration, you can set up the system to enter the meeting password for you.

If you need to generate touch tones (DTMF tones), press # on the remote control, then use the remote control keypad.

To configure a meeting password:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Enter the password in the **Meeting Password** field in one of these ways:
   - Press the remote control number buttons, using the text-entry method commonly used with cell phones.
   - Press **Keyboard** to use the onscreen keyboard to enter characters.
4. Press **Home** to save your change and return to the home screen.

About Multipoint Viewing Modes

What you see during a multipoint call can vary depending on how the Polycom system is configured, the number of sites participating, and whether content is shared. The multipoint viewing mode configured on the host system is the one used in the call. The following table describes the different multipoint viewing modes.

Setting	Description
Auto	Allow the system to switch between Discussion and Presentation modes, based on the interaction between the sites. • If more than one site is talking at the same time, the system uses Discussion mode so that all speakers can be seen. • If one speaker talks without interruption for about 15 seconds, the system uses Presentation mode so that all participants can see the speaker in a larger picture.
Discussion	View all of the sites at the same time, including your own site. This is also known as continuous presence. **Systems with:** — **See this:** Single monitor — All sites, each in its own window Dual monitors — Speaker on second monitor with other sites on first monitor, or one far site on each monitor
Presentation	View the person who is speaking. This is also known as voice activated switching. The current speaker always sees up to four far sites, each in its own window, on the first monitor. **Systems with:** — **See this:** Single monitor — Speaker in full screen Dual monitors — Speaker on the first monitor and near site on the second monitor
Full Screen	Enable every site in the call to see the speaker full screen. The current speaker sees the previous speaker.

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Using Chair Control for Multipoint Calls

During some multipoint calls, you can use chair control to manage the people video. In this type of call, the chair controller can choose the site whose video is sent to other sites in the conference. The chair controller can also disconnect a site or end the conference. Any participant can choose to view a specific site, request to be the broadcaster, or request to be chair controller.

Only one site at a time can be the chair controller. Before a site can become the controller, the site with control must give up control.

The type of host for the multipoint call and the systems in the call determine whether chair control is available.

Hosted by...	Allows chair control if...
Video Conferencing System	The call includes: • Polycom VSX systems, Polycom PVX™ systems, ViewStation® EX, ViewStation FX, and VS4000™ systems connected by IP, ISDN, or both IP and ISDN • Other systems connected by ISDN only
Bridge	Allowed by the bridge

To use the chair control options when you are in a multipoint call:

1. On a computer, open a web browser.
2. In the browser address line, enter the system's IP address, for example, http://10.11.12.13, to go to the video conferencing system's web interface.
3. Click **Place a Call**.
4. Click **Chair Control** to go to the Chair Control screen.

The Chair Control option is only available when the system is in a multipoint call. It is not available in cascaded multipoint calls.

5. Select a site from the list and then use the controls in the web interface to perform one of these actions:

If you are...	You can do this...	By selecting...
Chair controller	Pass chair control to the selected site.	**Release Chair**
	View the selected site's video. This remains in effect until you choose **Stop Viewing Site** or you release chair control. Refer to Selecting and Adjusting a Camera or Other Video Source for information about controlling near-site and far-site cameras.	**View Site**
	Return to viewing the video selected by the chair or by the host.	**Stop Viewing Site**
	Send your site's video to the other sites.	**Make Me the Broadcaster**
	Send the selected site's video to the other sites.	**Select Broadcaster**
	Remove the selected site from the conference.	**Disconnect Site**
	Disconnect all sites and end the call.	**End Conference**
Participant	Request control of the conference.	**Acquire Chair**
	View the selected site's video. This does not change what other sites see.	**View Site**
	Return to viewing the video selected by the chair or the host.	**Stop Viewing Site**

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 with the Do Not Disturb feature. Callers hear a busy signal and you receive no notification about incoming calls. You can, however, make outgoing calls.

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To temporarily refuse incoming calls:

1. On the home 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.

Answering Calls Automatically

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

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

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

To automatically answer calls:

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

If you have a VSX 3000 system that you are using as your computer monitor, Polycom recommends that you set up the system so that you have to answer calls manually.

If you receive a call while using the system as a computer monitor, you hear a ringing sound and you can switch to video to answer the call manually. Alternatively, you can ignore the call and it will not connect, thereby preventing the caller from seeing or hearing you at your desk.

Muting Automatically Answered Calls

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

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

To mute automatically answered calls:

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

Scheduling Calls

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

Call scheduling is not available through the system's web interface.

To schedule a call:

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

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

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To view scheduled calls in the calendar:

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

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

Using Lotus Sametime or Lotus Notes in Audio and Video Calls

Depending on your system configuration, your VSX system may support SIP sites using Lotus® Sametime® or Lotus Notes® in audio and video calls. For more information, contact your system administrator.

Using Microsoft LCS Features with Video Calls

Depending on how your system is configured, you may be able to use the Microsoft® LCS (Live Communications Server) contact list feature. This feature allows you to set up a list of LCS contacts, see if the contacts are online, and call them without knowing or remembering their addresses. Contacts appear in the directory and may also appear on the contact list home screen.

When you are viewing the contact list home screen, you can select **Manual Call** or press **Home** on the remote control to access the Place a Call screen.

Adding and Removing Microsoft LCS Contacts

To add or remove LCS contacts for the Polycom system:

1. Open the Microsoft Office Communicator or Windows Messenger application on a computer.
2. Log in to the application using the Polycom system SIP account information.
3. Use the application to add or remove contacts for the Polycom system.

The VSX system supports a maximum of 30 Microsoft LCS contacts with status information. Additional contacts will not have any online status information.

Viewing Microsoft LCS Contact Status

Status icons appear next to each LCS contact on the Polycom system. These icons indicate whether the contact is available, busy, or offline.

Status	Icon on the Polycom System	The video conferencing system is...
Available		Powered on and available to take calls.
Busy		Powered on but busy for one of the following reasons: • The system is in a call. • The system is set to I am Busy or Do Not Disturb.
Offline		Powered off.

Customizing Your Workspace

You can customize what you see on the screen, depending on how your system is configured.

Allowing the Far Site to Control Your Camera

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

To allow the far site to control your camera:

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

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

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Displaying the Far Site's Name When the Call Connects

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

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

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

Hearing Audio Confirmation When You Dial

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

To enable audio confirmation:

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

If Keypad Audio Confirmation is on and you enter a number while in a multipoint call hosted by one of the systems in the call, the far sites will hear the numbers as you enter them. If you do not want the far sites to hear the numbers, mute the system's microphone.

Adjusting for Room Lighting

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

Because backlight controls adjust the main camera, these controls will not affect the quality of other cameras or content sources.

To turn backlight compensation on:

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

Setting Camera Brightness (VSX 3000 Only)

Depending on your system configuration, you can set the camera brightness. Like the backlight compensation setting, this setting adjusts the camera's iris. If there is a lot of light in the room, set the camera brightness to a low number so the camera takes in less light. If the room is dark, set the camera brightness to a high number so the camera takes in more light. The default is 11.

To set the camera brightness:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Scroll to **Camera Brightness**, press on the remote control and select the brightness level.
4. Press **Home** to save your change and return to the home screen.

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Changing the System Color Scheme

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

To change the color scheme:

1. Select **System** from the Place a Call screen.
2. Select **User Settings** from the System screen.
3. Select **Next** to see more settings.
4. Scroll to **Color Scheme**, press on the remote control, and select one of the color schemes.
5. Press **Home** to save your change and return to the home screen.

Using Avaya Network Features with Video Calls

Depending on how your system is configured, you may be able to use Avaya® telephony network features such as call forwarding, transferring calls, and adding additional sites in an audio-only conference.

To activate call forwarding:

1. Make sure that the Polycom system is not in a call.
2. From the Place a Call screen on the Polycom system, dial the Feature Access Code provided by the Avaya Communications Manager (ACM) administrator, followed by the E.164 extension of the system to which you want to forward the calls. For example, dial *22016 if *2 is the Feature Access Code and 2016 is the system E.164.
3. Wait for confirmation beeps.

To deactivate call forwarding:

1. From the Polycom system Place a Call screen, dial the Feature Access Code provided by the ACM administrator. For example, #2 if #2 is the Feature Access Code for disabling call forwarding.
2. Wait for confirmation beeps.

To transfer a call:

1. While in a call, press * on your Polycom system remote control to access the tone pad.
2. Press **Dot** on the remote to activate flash hook. The first far-site system is placed on hold.
3. Wait for a dial tone, then dial the extension of the far-site system to which you want to transfer the call. The call connects both audio and video between the local system and the second far-site system. The first far-site system is still on hold.
4. Hang up the near-site system. The two far-site systems are now connected in a call with audio and video, if the capabilities are present.

To add a system to a call:

1. While in a call, press * on the Polycom system remote control to access the tone pad.
2. Press **Dot** on the remote to activate flash hook. The far-site system is put on hold.
3. Wait for a dial tone, then dial the extension of the system that you want to add to the call.
4. Press **Dot** on the remote again. The call becomes an audio-only conference with all of the systems. If the system that dialed the flash hook hangs up, the other systems will be connected in a call with audio and video, if the capabilities are present.

Streaming a Conference to the Web

Starting a Stream

Your Polycom system may be configured to allow you to make point-to-point or multipoint calls available for others to view using a web browser. Users who view the stream need to know the address of the video conferencing system and the system's room password (if any).

To stream a conference:

1. Select **System** from the Place a Call screen.
2. Select **Utilities** from the System screen.
3. Select **Web Streaming** from the Utilities screen.
4. Select the **Start Streaming** option to begin streaming.

You can start the stream before or during a video call.

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To stop streaming a conference:

1. Select **System** from the Place a Call screen.
2. Select **Utilities** from the System screen.
3. Select **Web Streaming** from the Utilities screen.
4. Clear the **Start Streaming** option to stop the stream.

Viewing a Stream

Before you view the streamed conference, you need to:

- Install the QuickTime player on your computer.
- Obtain the IP address of the video conferencing system and the password (if any) from the conference organizer.
- Verify that you are using a network that allows multicast packets.

To view a streaming conference:

1. On a computer, open a web browser.
2. In the browser address line, enter the system's IP address, for example, http://10.11.12.13, to go to the video conferencing system's web interface.
3. Click **View a Meeting**.
4. If prompted, enter the user name and password provided by the conference organizer.

To stop viewing the streaming conference:

➢ Close the web browser.

Using the SoundStation VTX 1000 Conference Phone in Video Calls

Your conference room may include a Polycom video conferencing system integrated with a SoundStation VTX 1000 conference phone. This configuration lets you use the video conferencing system and the conference phone together to place and manage video and audio-only calls. If the system is configured correctly, “VSX OK” appears on the conference phone display.

Placing a Video Call with the SoundStation VTX 1000 Conference Phone

If your Polycom video conferencing system and SoundStation VTX 1000 have been configured to work together, you can use the conference phone to place video calls.

To place a video call using the SoundStation VTX 1000 phone:

1. Leave the SoundStation VTX 1000 conference phone on hook.
2. On the conference phone keypad, enter one of these:
   - The ISDN number (for example, 19784444321) of the system you want to call
   - The IP address (for example, 10*11*12*13) of the system you want to call
3. Press the **VID CALL** soft key on the conference phone to place the call.

Adding Sites to a Video Call Using the SoundStation VTX 1000 Conference Phone

You can add video or audio-only sites to a video call using the SoundStation VTX conference phone.

To add video or audio-only sites:

1. Place a video call to the first site using the SoundStation VTX conference phone or the video conferencing system.
2. On the conference phone, enter the number of the site you want to add.
   - To call a video site, enter the number and press the **VID CALL** soft key.
   - To call an audio-only site, enter the number and press the Phone button on the phone keypad.

Use the SoundStation VTX 1000 conference phone to make volume adjustments after adding an audio-only site to a video call.

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Muting the Audio in a Call that Includes a SoundStation VTX Conference Phone

You can use the mute button on the SoundStation VTX conference phone to mute the audio in video calls.

To mute the audio in a call with the SoundStation VTX 1000 conference phone:

- Do one of the following:
  - Press the Mute button on the conference phone.
  - Press **Mute** on the remote control.

The red indicator lights on the conference phone show when the audio is muted. The near site mute icon also appears on the monitor display.

Adding Video to a SoundStation VTX 1000 Conference Phone Audio-only Call

If you are in an audio call with another SoundStation VTX 1000 conference phone and the far site also has a Polycom video conferencing system integrated with a SoundStation VTX conference phone, you can switch from the audio only call to a video call.

To add video to an audio call:

1. Place a call with your SoundStation VTX conference phone to the far site's conference phone.
2. When the audio call has connected, press the **ADD VIDEO** soft key on the conference phone.

You hear a ringing sound as the video portion of the call is added. The SoundStation VTX conference phones are used as microphones for the video call.

Ending a Call

To end a call using a Polycom system integrated with a SoundStation VTX 1000 conference phone:

From the conference phone:

- Press the **END VIDEO** soft key on the phone.
  - If the conference is a point-to-point video call, it will end immediately.
  - If the conference is a multipoint video call, the Hang Up screen appears on the monitor. In this case, select which site(s) to disconnect.

From the Polycom system:

1. Press **Hang Up** on the remote control.
2. On the Hang Up screen, do one of the following:
   - Select which site to disconnect.
   - Choose **Hang Up All** to end the call for all sites.

Ending a Call with Audio-only Participants

Your conference may include a mix of video participants and audio-only participants. If an audio-only participant hangs up during the call, you need to disconnect the call from the conference. This is the same as hanging up a telephone receiver in a regular phone call.

To disconnect the audio-only call:

1. Press **Hang Up** on the remote control.
2. If the call is a multipoint call, select **VTX Conference Phone** from the Hang Up screen to clear the audio line.

Even if you hang up the video call or the audio-only site hangs up, you still need to hang up the audio-only call from your system. If you do not disconnect the audio-only call from the Polycom system, you will hear a tone from the telephone through the conference.

Using Your VSX 3000 System as a Computer Monitor

If you have a VSX 3000 system, you can save space in your office or conference room by also using the VSX 3000 XGA display as your computer monitor.

Typically, you do not need to change the factory defaults for these settings. However, if you do need to access the monitor settings, use the buttons on the front of the VSX 3000 monitor. Press **MENU**, then press **SELECT** and **ADJUST** as needed to change the settings.

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Before You Begin

Check that the computer video is configured to use one of these supported resolutions and refresh rates:

Resolution	Refresh Rates (Hz)
VGA (640 x 480)	60, 72, 75
VGA (720 x 400)	70
SVGA (800 x 600)	56, 60, 72, 75
XGA (1024 x 768)	60, 70, 75
SXGA (1152 x 864)	75
SXGA (1280 x 960)	60
SXGA (1280 x 1024)	60, 75
Macintosh (640 x 480)	67
Macintosh (832 x 624)	75

To use your VSX 3000 system as a computer monitor:

1. Connect your computer to the VSX 3000 system as shown on the setup sheet that came with the VSX 3000 system.
2. Press the **Input** button on the front of the VSX 3000 system to toggle between displaying content from the computer and showing video from the video conferencing system.

To answer a call while using the VSX 3000 system as a computer monitor:

1. When you hear a ring, press the **Input** button on the front of the system to switch to the video conferencing system.

   You must answer within 90 seconds, or the system will automatically reject the call.
2. Press **Call** on the remote control.

If you use the VSX 3000 system as your computer monitor, Polycom recommends that you set up the system so that calls must be answered manually. This ensures that callers do not unexpectedly see or hear you at your desk.

When the system is set up for manual call answering, the system rings to indicate an incoming call. To answer the call, switch to the video conferencing system and answer manually. If you do not answer manually, the call will not connect.

Video Conferencing Tips

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

Tips for Great Meetings

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

Tips for Great Video

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

Tips for Great Audio

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

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VSX Set-Top and Component Systems

- Place the microphone on the table in front of the people in the meeting. If your room is very large, consider adding additional microphones.
- If your video conferencing room is configured to use stereo sound, the microphones are positioned and configured during system setup. It is important that you do not move them as this may detract from the stereo audio experience. Contact your system administrator for microphone placement recommendations if the microphones are accidently moved.
- Don't place papers or other objects on or in the way of the microphone, and don't rustle papers or tap on the microphone or table.

Tips for Showing Content

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

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