

# RealPresence Desktop Help for Mac OS X, Version 3.0

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You can use RealPresence Desktop in standalone mode or managed mode.

- Standalone mode provides direct access to the configuration and settings of RealPresence Desktop. It does not require registration to a Polycom management server (such as Polycom Converged Management Application™ (CMA®) 4000/5000 or Polycom RealPresence Resource Manager). It supports registration and calling with a H.323 gatekeeper and/or a SIP server. A license must be purchased and entered manually to use this application beyond the 30 day trial period.
- Managed mode provides the benefits of centralized management. These include centralized management of configuration, automatic distribution of runtime licenses, and access to a centralized directory server. In managed mode, you must register to a Polycom management server (a Polycom Converged Management Application (CMA) 4000/5000 or Polycom RealPresence Resource Manager). The Polycom management server configures RealPresence Desktop automatically. A RealPresence Desktop License does not need to be purchased when used in managed mode (licensing is controlled from the Polycom management server).

## Automatic Setup

In managed mode, The Polycom management server configures RealPresence Desktop automatically.


### To enable the RealPresence Desktop application to discover the provisioning server:

- 1 Enter your email address (usually your corporate email address) on the **Sign In** screen, and then click **Next**.
- 2 Enter your **User Name** and **Password**.

If a server name does not appear in the **Server** field, the application did not find a provisioning server. Contact your IT administrator for the information to enter in the Server field.

## Manual Setup

In standalone mode, you need to import a license to activate RealPresence Desktop and configure the application manually. You may need to contact your IT administrator for the information to enter during the setup procedure.

- 1 At the **Sign In** screen, click **SkipSign-in**.
- 2 Choose one of the following:
  - To use the RealPresence Desktop application as a trial, click **Continue**.
  - To activate the application, click **Activate**. Then import your license, or enter your license and activation key.
- 3 Click .

4 Click **General** and configure the following settings.

Option	Description
Display Name	Name to display to the far end during a call.
Automatically start when the system starts	Specifies whether to start RealPresence Desktop automatically when you start your computer.
Auto-answer incoming calls	Specify whether to answer incoming calls automatically.
Audio mute auto-answered calls	Allows the system to answer calls without turning on the microphone.
Video mute auto-answered calls	Allows the system to answer calls without turning on the camera.
Set RealPresence Desktop as the default program for the following links:	Specifies whether the RealPresence Desktop system should open automatically when you click these link types. <ul style="list-style-type: none"> <li>• Callto</li> <li>• H.323</li> <li>• SIP</li> </ul>

5 Click **Call Rate** and select your preferred call speed (up to 1920 kbps)

- For household users, select 384 kbps.
- For enterprise network, choose 512 kbps.

6 If desired, enable H.323. Click **H.323** to configure the following options.

Options	Descriptions
Enable H.323 Calls	Enable or disable H.323 calls.
Gatekeeper Registration	Enable or disable registering your system with a gatekeeper.
Gatekeeper Address	IP address or FQDN of the gatekeeper.
H.323 Alias	Name to display to the far site during calls.
H.323 Extension	Name that gatekeepers use to identify this system. Your organization's dialing plan may define the names you can use.

7 If desired, enable SIP. Click **SIP** to configure the following options.

Options	Descriptions
Enable SIP Calls	Select this option to display the configuration settings for SIP calls.
SIP Registration	Enable or disable registering your system with a SIP server.
SIP Proxy Server	IP address or FQDN of the SIP proxy server.
SIP Domain	Domain name for authentication with SIP registrar server: <ul style="list-style-type: none"><li>• If you use a Polycom DMA server as the SIP server, leave this field empty.</li><li>• If you use a third-party SIP server, enter the domain name for authentication with the registrar server.</li></ul>
SIP User Name	User name for authentication with a registrar server.
Authorization Name	Name to use for authorization when registering with a SIP registrar server.
SIP Password	Password for authentication with a registrar server.
Transport Protocol	Protocol the system uses for SIP signaling: <ul style="list-style-type: none"><li>• TCP: reliable transport</li><li>• UDP: best-effort transport</li><li>• TLS: encrypted transport</li></ul>

8 To specify your audio devices, select **Device** from the menu, and then configure the options displayed.

## Managing Calls

You can simply use the RealPresence Desktop application to make, answer, reject, or end calls.

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

- 1 Choose one of the following:
  - On the dialpad, click the numbers to enter the contact number to call.



- Using your keyboard, enter the number.

You can use any of the formats shown here.

Format	Description
2555	SIP user name E.164 extension for H.323
stereo.polycom.com	FQDN name.
user@domain.com	SIP_username@domain.com
10.11.12.13###1234	signaling IP###conference ID for H.323
1234@10.11.12.13	SIP user name@IP address
10.11.12.13	IP address.

- 2 Click **Call** to start the call.

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





- 1 Select .
- 2 Enter the name or part of the name that you want to call, and then press **Enter**.
- 3 Click  beside the contact name.
- 4 Click the applicable device name of the contact to start the call.










### Answering a Call

- » Click **Answer**.

### Using the In-Call Toolbar

During a call, touch the screen to view the in-call toolbar. Use the in-call toolbar to access additional features of the RealPresence Desktop application, for example, to switch cameras or mute your audio.

Icons	Descriptions
	Network connection status.
	Hide or display local self-view.
	Encryption status.
	Mute or unmute your video.

Icons	Descriptions
	Mute or unmute your microphone.
	Mute or unmute your speaker.
	Adjust the volume.
	Share content.
	Enter a number or password.
	Control the far-end camera.
	Change call settings.
	Maximize or restore the screen.
	Hang up from a call.



### To change device settings during a call:

» During a call, click  to switch your audio and video devices.

## Viewing Recent Calls



The RealPresence Desktop application stores details about the most recent calls placed and received.

### To view information about recent calls:

- 1 Click .
- 2 Click  beside the call that you want to review.

## Changing the Video Layout

In a call hosted by the Polycom RMX® system:

- 1 Connect to the Polycom RMX virtual meeting room.
- 2 Click .
- 3 To display the layout options, click the asterisk (\*) two times.
- 4 Select the number that corresponds to the layout that you want to use.
- 5 To return to the call, click .

## Managing Contacts



The device displays a list of the 100 most recent contacts and other local contacts that fit on the screen.



The RealPresence Desktop application enables you to access contacts from two sources:

- The application manages a local directory that is available in both standalone and provisioned modes.
- When deployed in provisioned mode, the application enables you to access and search a corporate directory that is hosted by the administrator. This directory uses an LDAP interface.


### To add a new contact to your local address book manually:

- 1 Click , and then click .
- 2 Enter the contact's **Last Name** and/or **First Name**.
- 3 (Optional) Enter identifying information about the contact:
  - Title
  - Department
  - Location
  - Phone
  - Email
- 4 Click **Add a device**.
- 5 Enter the **Device Name** and **Device Type**.
- 6 Complete at least one of the following fields.



Fields	Descriptions
IP Address	IP address of the contact's endpoint.
H.323 Alias	Number that gatekeepers use to identify this system. Your organization's dialing plan may define the numbers you can use.
H.323 Name	Name that gatekeepers use to identify this system. Your organization's dialing plan may define the names you can use.
SIP URI	SIP URI of the system.

- 7 Click **Add**, and then click **Save**.



### To add a contact from a corporate directory to your local address book:

- 1 Click .
- 2 Enter the name or part of that name, and then press **Enter**.
- 3 From the search results, select the contact name.
- 4 Click **Save to Contacts**.

### To search for a contact:


- 1 Select .
- 2 Enter the name or part of the name that you want to call, and then press **Enter**.
- 3 Click  beside the contact name.
- 4 Click the applicable device name of the contact to start the call.

### To delete a contact:

- 1 Click .
- 2 Enter the name or part of the name you want to find.
- 3 From the search results, select the contact name.
- 4 Click .
- 5 Click **Delete**.

## Sharing Content

### To share content:

- 1 Click .
- 2 Choose one of the following
  - To share your desktop, select an option under **Share Monitor**.
  - To share a running application, select an option under **Share Application**.

### To stop sharing content from Monitor 1 or an application:

- » Click **Stop**.



## Improving Your View

- » To toggle between maximizing and restoring the video and content windows, double-click within the window area.

## SmartPairing

You can pair your device with a Polycom HDX or RealPresence Group Series system and then share your monitor or application with the system.

### To share your content with the Polycom HDX or RealPresence Group Series System:

- 1 Click .
- 2 Click **SmartPairing** and check **Enable SmartPairing**.
- 3 Click .
- 4 Do one of the following:
  - Select a device from the **System Detected** list.
  - Enter a device address in the **Enter a room system IP address** field.
- 5 Click **Share Content**.
- 6 Choose one of the following
  - To share your desktop, select an option under **Share Monitor**.
  - To share a running application, select an option under **Share Application**.



- Ultrasound-based auto detection requires HDX version 3.1.1 and above, or RealPresence Group Series version 4.0.1 and above. Please refer to HDX and RealPresence Group Series Release Notes for details about SmartPairing settings.
- You need to enable SmartPairing on the room system.

### To stop sharing content from Monitor or an application:

- » Click **Stop**.

## Solving Problems

### Viewing Logs

Viewing the log file is helpful in determining the causes and solutions for problems.



Close the RealPresence Desktop application before opening the log file.

- Mac: /Users/username/Library/Application Support/Polycom RealPresence Desktop



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**To collect and email the log file:**

- 1 Click **Help** on the application's title bar.
- 2 Click **Send Log**.

**Closing and Exiting the Application**

- 1 Click **Polycom RealPresence Desktop** on the application's title bar.
- 2 Select an option from the menu.
  - Select **Hide RealPresenceDesktop** to keep the application running in the system tray.
  - Select **Quit RealPresenceDesktop** to shut down the application.

# **Polycom® RealPresence® Desktop Application Online Help for Mac OS X, Version 3.0, July 2013**

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