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

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>Name to display to the far end during a call.</td>
</tr>
<tr>
<td>Automatically start when the system starts</td>
<td>Specifies whether to start RealPresence Desktop automatically when you start your computer.</td>
</tr>
<tr>
<td>Auto-answer incoming calls</td>
<td>Specify whether to answer incoming calls automatically.</td>
</tr>
<tr>
<td>Audio mute auto-answered calls</td>
<td>Allows the system to answer calls without turning on the microphone.</td>
</tr>
<tr>
<td>Video mute auto-answered calls</td>
<td>Allows the system to answer calls without turning on the camera.</td>
</tr>
<tr>
<td>Set RealPresence Desktop as the default program for the following links:</td>
<td>Specifies whether the RealPresence Desktop system should open automatically when you click these link types.</td>
</tr>
<tr>
<td>• Callto</td>
<td></td>
</tr>
<tr>
<td>• H.323</td>
<td></td>
</tr>
<tr>
<td>• SIP</td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Options</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable H.323 Calls</td>
<td>Enable or disable H.323 calls.</td>
</tr>
<tr>
<td>Gatekeeper Registration</td>
<td>Enable or disable registering your system with a gatekeeper.</td>
</tr>
<tr>
<td>Gatekeeper Address</td>
<td>IP address or FQDN of the gatekeeper.</td>
</tr>
<tr>
<td>H.323 Alias</td>
<td>Name to display to the far site during calls.</td>
</tr>
<tr>
<td>H.323 Extension</td>
<td>Name that gatekeepers use to identify this system. Your organization's dialing plan may define the names you can use.</td>
</tr>
</tbody>
</table>
7 If desired, enable SIP. Click **SIP** to configure the following options.

<table>
<thead>
<tr>
<th>Options</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable SIP Calls</td>
<td>Select this option to display the configuration settings for SIP calls.</td>
</tr>
<tr>
<td>SIP Registration</td>
<td>Enable or disable registering your system with a SIP server.</td>
</tr>
<tr>
<td>SIP Proxy Server</td>
<td>IP address or FQDN of the SIP proxy server.</td>
</tr>
<tr>
<td>SIP Domain</td>
<td>Domain name for authentication with SIP registrar server:</td>
</tr>
<tr>
<td></td>
<td>• If you use a Polycom DMA server as the SIP server, leave this field empty.</td>
</tr>
<tr>
<td></td>
<td>• If you use a third-party SIP server, enter the domain name for authentication with the registrar server.</td>
</tr>
<tr>
<td>SIP User Name</td>
<td>User name for authentication with a registrar server.</td>
</tr>
<tr>
<td>Authorization Name</td>
<td>Name to use for authorization when registering with a SIP registrar server.</td>
</tr>
<tr>
<td>SIP Password</td>
<td>Password for authentication with a registrar server.</td>
</tr>
<tr>
<td>Transport Protocol</td>
<td>Protocol the system uses for SIP signaling:</td>
</tr>
<tr>
<td></td>
<td>• TCP: reliable transport</td>
</tr>
<tr>
<td></td>
<td>• UDP: best-effort transport</td>
</tr>
<tr>
<td></td>
<td>• TLS: encrypted transport</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Format</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2555</td>
<td>SIP user name</td>
</tr>
<tr>
<td></td>
<td>E.164 extension for H.323</td>
</tr>
<tr>
<td>stereo.polycom.com</td>
<td>FQDN name.</td>
</tr>
<tr>
<td><a href="mailto:user@domain.com">user@domain.com</a></td>
<td><a href="mailto:SIP_username@domain.com">SIP_username@domain.com</a></td>
</tr>
<tr>
<td>10.11.12.13##1234</td>
<td>signaling IP##conference ID for H.323</td>
</tr>
<tr>
<td>1234@10.11.12.13</td>
<td>SIP user name@IP address</td>
</tr>
<tr>
<td>10.11.12.13</td>
<td>IP address.</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Icons</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Network connection status.</td>
</tr>
<tr>
<td></td>
<td>Hide or display local self-view.</td>
</tr>
<tr>
<td></td>
<td>Encryption status.</td>
</tr>
<tr>
<td></td>
<td>Mute or unmute your video.</td>
</tr>
</tbody>
</table>
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 \( \text{add} \), and then click \( \text{add} \).
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.

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

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.

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
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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