



USER GUIDE

V3.8 | September 2017 | 3725-69931-008A

Polycom[®] RealPresence[®] for Mac[®] OS X



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Polycom[®] RealPresence[®] Desktop Modes of Operation

RealPresence Desktop video collaboration software has three modes of operation:

- In standalone mode, RealPresence Desktop video collaboration software supports registration and calling with an H.323 gatekeeper and/or a SIP server. It does not require registration with a Polycom provisioning server such as a Polycom[®] RealPresence[®] Resource Manager system. In standalone mode, you have direct access to the configuration and settings of RealPresence Desktop video collaboration software.

You must purchase a license and enter licensing information manually to use this beyond the 30-day trial period.

- In managed mode, RealPresence Desktop video collaboration software registers with a Polycom provisioning server like a RealPresence Resource Manager system. The Polycom provisioning server configures RealPresence Desktop video collaboration software automatically. It also provides access to a centralized directory server. In managed mode, the Polycom provisioning server manages licensing of RealPresence Desktop video collaboration software, so you do not need to purchase an individual license.
- In Cloud service mode, a Service Provider system configures RealPresence Desktop video collaboration software automatically. Once the Cloud service is enabled by the provisioning service, the **Cloud Sign-In** option is enabled and users can sign-in with their Cloud account, which is normally an email address.

Getting Started with RealPresence Desktop video collaboration software

Topics:

- [Get Started with RealPresence Desktop video collaboration software in Standalone Mode](#)
- [Get Started with RealPresence Desktop in Managed Mode](#)
- [Sign Out from the Provisioning Server](#)
- [Check Your Connection Status](#)
- [Connection Status Information](#)

When first signing into RealPresence Desktop video collaboration software application, you have the following options based on the mode of operation:

- Select **Individual** when using RealPresence Desktop video collaboration software in standalone mode.
- Select **Enterprise** when using RealPresence Desktop video collaboration software in managed mode.
- Select **Cloud** when you are in a Cloud service environment.

Get Started with RealPresence Desktop video collaboration software in Standalone Mode

Standalone mode does not require registration with a Polycom provisioning server. You need to configure RealPresence Desktop video collaboration software manually.

Procedure

1. Start RealPresence Desktop video collaboration software and select **Individual** on the **Login** page. then select **Enter**.
2. Do one of the following:
 - Select **Trial** to use the RealPresence Desktop video collaboration software application as a trial.
 - Select **Activate** to activate the application with a license. Then import your license, or enter your license and activation key.

Get Started with RealPresence Desktop in Managed Mode

In managed mode, RealPresence Desktop video collaboration software will try to discover the provisioning server from which it will receive its license and get some configuration settings. You use your company account to log into RealPresence Desktop video collaboration software. LDAP search feature is only supported under the managed mode.

Procedure

1. Start RealPresence Desktop video collaboration software and select **Enterprise** on the **Login** page. Then select **Enter**.
2. Do one of the following:
 - To let the application find your provisioning server based on your email address, enter your email address (usually your corporate email address), and then select **Next**.

Note: If no server name appears in the **Server** field, the application cannot find a provisioning server. Contact your IT administrator for the information to enter into the **Server** field.


 - To specify a provisioning server, leave the email address blank, and then select **Next**. Then enter your server address in **Server:** text field and select **Next**.
3. Enter your **User Name** and **passcode**.
4. Select **Sign In**. RealPresence Desktop video collaboration software will discover the provisioning server automatically

Note: When Extensible Messaging and Presence Protocol (XMPP) service stops working, if you sign into more than one RealPresence Desktop video collaboration software, the later RealPresence Desktop video collaboration software will fail to register H.323 because of a duplicate alias error.


Sign Out from the Provisioning Server

You can sign out from the provisioning server and choose to work in other operation modes.

Procedure

- » Select  and then select **Sign Out**.

Check Your Connection Status

You can check your connection status such as your meeting number and server address by clicking or tapping .

Procedure

- » Select  to see connection status information.

If the gatekeeper or server registration fails,  is displayed on the main window. Select  to see more information.

Connection Status Information

The following connection information may be available.

Fields	Description
My Number	Numbers the far end can use to call you. Depending on your dialing plan, the far end may call you with any of your numbers, including your IP address. Ask your IT administrator for more information.
Provisioning	Provisioning server address.
H.323	H.323 gatekeeper.
SIP	SIP configuration information.
Network	IP address the far end can use to call you.

Startup Options

Topics:

- [Remember My Startup Choice](#)
- [Set Your Startup Preference](#)

By default, the RealPresence Desktop video collaboration software starts up on its home page, showing the following two options:

- **Place a Call** Make calls or access contacts.
- **Connect to Room** Connect to a room to share content.

You can let the RealPresence Desktop video collaboration software remember your startup option. You can also change the settings later.

Remember My Startup Choice

The first time you start up the RealPresence Desktop video collaboration software, you can let the application to remember your choice on the home page and bring you directly to the relevant window later.

Procedure

1. After logging in to the RealPresence Desktop video collaboration software for the first time, select **Place a Call** or **Connect to Room** on the home page.
2. When asked **Always start from this page?**, select **Yes**.

Set Your Startup Preference

You can choose one of the following as your startup page:

- **Home Page** Go to the home page, showing the options **Place a Call** and **Connect to Room**.
- **Place a Call** Go directly to the calling page.
- **Connect to Room** Go directly to the room connection page.

Procedure

1. Select .
2. Go to **General** > **Start up at:**, then select an option.

Configuring Application Settings

Topics:


- [Configure Profile Information](#)
- [Configure Profile Photo](#)
- [Virtual Business Card](#)
- [Start RealPresence Desktop video collaboration software Automatically When Your System Powers up](#)
- [Answer Incoming Calls Automatically](#)
- [Open Links Using RealPresence Desktop video collaboration software](#)
- [Configure Call Rate](#)
- [Configure Call QoS](#)
- [Configure H.323 Settings \(Standalone Mode Only\)](#)
- [Configure SIP Settings \(Standalone Mode Only\)](#)
- [Configure Audio Devices](#)
- [Enable Polycom Acoustic Fence for USB Headsets](#)
- [Enable Polycom NoiseBlock](#)
- [Configure Camera](#)
- [Configuring Network Settings](#)
- [Enable Automatic Face Brightness Adjustment](#)
- [Set My Default Call Type](#)
- [Display Test Features](#)

RealPresence Desktop video collaboration software application setting options vary depending on your mode of operation. In standalone mode, you need to configure RealPresence Desktop video collaboration software manually. In managed mode and cloud service mode, a provisioning server configures most of the RealPresence Desktop video collaboration software options automatically.

Configure Profile Information

In standalone mode, if you enable your virtual business card, you can set your personal information, such as name, title, and location, to show to your far end. In managed mode and cloud service mode, this information comes from the provisioning server and is not configurable.

Procedure

1. Select .
2. Select **Profile**.
3. Enter your profile information.

In standalone mode, this information displays on your virtual business card.





Related Links

[Set Virtual Business Card](#) on page 10

Configure Profile Photo

You can set your profile photo. Meeting participants see this photo when you mute your video in a meeting.

Procedure

1. Select .
2. Select **Profile**.
3. Select  and browse to select a picture.
4. When the photo appears in the preview window, drag to position it, or select  to zoom in or  to zoom out the picture. Select **Submit** to save your changes.
5. Select to enable **Profile Photo**.
6. Select **OK** to save your settings.

Related Links

[Mute Your Video](#)

Virtual Business Card

You can enable your virtual business card to show your personal information, such as name, and title, to far-end participants.


Your virtual business card is unavailable in the following situations:

- When you are in an SVC multi-point call
- When your microphone is muted
- When your screen resolution is lower than 180p

Set Virtual Business Card

In standalone mode, if you enable virtual business card, you can set your personal information, such as name and title, to show to your far end. In managed mode, if you enable virtual business card, your profile information comes from the provisioning server. During the meeting, these information appears together with your video or your photo when you are speaking in a meeting.

Procedure

1. Select .
2. Go to **Profile**.
3. Do one of the following:
 - In managed mode, check the **Virtual Business Card** option and select **OK**.

- In standalone mode, enter your name, title, and location, check the **Virtual Business Card** option and select **OK**.
4. Select **OK** to save your changes.

Related Links

[Configure Profile Information](#) on page 9

Start RealPresence Desktop video collaboration software Automatically When Your System Powers up

You can choose to start RealPresence Desktop video collaboration software automatically when you start your device.


Procedure

1. Select .
2. Select **General > Automatically start when system starts**.

Answer Incoming Calls Automatically

You can specify whether to answer incoming calls automatically, and select whether to mute your video or audio for these automatically answered calls. If you mute your video or audio for automatically answered calls, you can turn them on using the in-call toolbar anytime during the call.

Procedure

1. Select .
2. Select **Auto-answer incoming calls**.
3. To enable the system to answer calls without turning on the microphone, select **Audio mute auto-answered calls**.
4. To enable the system to answer calls without turning on the camera, select **Video mute auto-answered calls**.

Related Links

[Answer a Call](#) on page 19


Open Links Using RealPresence Desktop video collaboration software

You can set RealPresence Desktop video collaboration software as the default program to open Callto, H.323, or SIP links.

If set, when you click a link of these type, RealPresence Desktop video collaboration software launches automatically to call this link.

Note: Ensure the links are not used by other applications such as Microsoft Lync. Otherwise, restart RealPresence Desktop video collaboration software to register these links again to take effect.

Procedure


1. Select .
2. Select **Advanced** and select a link type option below **Set RealPresence Desktop as the default program for the following links:**
 - **Callto**
 - **H.323**
 - **SIP**
3. Select **OK** to save your settings.

Configure Call Rate

The call rate acts as a limit on the maximum rate at which a call will connect. If the far end imposes a lower rate, then the lower rate will be the one in effect. The call rate impacts both incoming and outgoing calls.

The lowest selectable call rate for RealPresence Desktop video collaboration software is 256 kbps. RealPresence Desktop video collaboration software can participate in 128 kbps calls, but only if the far end or the gatekeeper imposes this rate.

Procedure

1. Select .
2. Select **Call** and select an option below **Select the call rate:**
 - For household users, select 384 kbps.
 - For enterprise networks, select 512 kbps.
3. Select **OK** to save your settings.

Related Links

[Share Content](#) on page 30


[I Cannot Find the Content Button](#) on page 38

Configure Call QoS

The QoS feature allows the RealPresence Desktop video collaboration software to mark transmitted media traffic with the appropriate QoS value, enhancing the potential of RealPresence Desktop video collaboration software to improve the video and audio user experience. The QoS feature is only available in managed mode.

Note: Some VPN services may not transmit audio and video correctly when QoS is enabled. Check with your system administrator before you enable QoS in a VPN environment.


Procedure

1. Select .
2. Select **Call Rate**.
3. Select one of the options under **QoS**:
 - **Never Use QoS** Disable QoS.
 - **Let Provisioning Server Control QoS** Let RealPresence Desktop video collaboration software use the QoS value set on the provisioning server.
4. Select **OK** to save your settings.

Configure H.323 Settings (Standalone Mode Only)

To make calls in standalone mode, you must configure either H.323 or SIP settings manually.

Procedure

1. Select .
2. Select **H.323**.
3. To enable H.323 calls, select **Enable H.323 Calls**.
4. To register your system to a gatekeeper, select **Gatekeeper Registration** and configure the gatekeeper:
 - **Gatekeeper Address** Enter the IP address or FQDN of the gatekeeper.
 - **H.323 Alias** Enter the name to display to the far site during calls. Your organization's dialing plan may define the names you can use for enterprise net.
 - **H.323 Extension** Enter the number that gatekeepers use to identify this system. Your organization's dialing plan may define the numbers you can use for enterprise net.

Related Links


[H.323 Registration Problems](#) on page 40

Configure SIP Settings (Standalone Mode Only)

To make SIP calls, you must configure SIP settings manually in standalone mode.

Note: If you use a Polycom DMA server as the SIP server, leave the **Domain** field empty. If you use a third-party SIP server, enter the domain name for authentication with the registrar server.

Procedure

1. Select .
2. Select **SIP > Enable SIP Calls**.
3. To register your system to a SIP server, select **SIP Registration** and configure the SIP server:
 - **SIP Proxy Server** Enter the IP address or FQDN of the SIP proxy server.


- **SIP Domain** Enter the domain name for authentication with SIP registrar server.
 - **SIP User Name** Enter the user name for authentication with a registrar server.
 - **Authorization Name** Enter the name to use for authorization when registering with a SIP registrar server.
 - **Password** Enter the passcode for authentication with a registrar server.
4. To choose a protocol for SIP signaling, select an option under **Transport Protocol**:
- **TCP** For reliable transport.
 - **UDP** For best-effort transport.

Configure Audio Devices

If you have more than one audio input (microphone) or output (speaker) devices, you can specify which to use with RealPresence Desktop video collaboration software. If you have only one audio input or output device, they are used by default.

Note: Do not select **Build-in Input** in the Microphone drop-down list, otherwise people cannot hear you. You can improve audio quality by disabling the Ambient noise reduction option under **System Preferences > Sound**.

Procedure

1. Select .
2. Select **Device**.
3. Select a microphone from the **Microphone** drop-down list.
4. Select a speaker from the **Speaker** drop-down list.
5. Select **OK** to save your settings.

Related Links

[Prevent RealPresence Desktop video collaboration software to Take Exclusive Control of the Microphone](#) on page 39


[Select Audio and Video Preferences During a Meeting](#) on page 22

[Configure Camera](#) on page 15

Enable Polycom[®] Acoustic Fence[™] for USB Headsets

When you are using a USB headset, you can enable Polycom[®] Acoustic Fence[™] to mask background noise during calls.

Procedure

1. Select .
2. Select **Device > USB Headset Acoustic Fence**.
3. Select **OK** to save your settings.

Enable Polycom® NoiseBlock™

You can enable Polycom® NoiseBlock™ to mask percussive sound (such as tapping and hands clapping) when no one is talking in a meeting.

Procedure

1. Select .
2. Select **Audio Device** > **Enable NoiseBlock**.

Related Links


[Enable Music Mode](#) on page 36

[Using Polycom SmartPairing](#) on page 31

Configure Camera

If you have more than one cameras connected to your computer, you can specify one to use with RealPresence Desktop video collaboration software.

Procedure

1. Select .
2. Select **Camera** and select an option from **Video Device** drop-down list.
3. To change your camera properties, select **WebCam Settings**, change the settings, and select **OK**.
4. Select **OK** to save your settings.

Related Links

[Configure Audio Devices](#) on page 14

[Select Audio and Video Preferences During a Meeting](#) on page 22

Configuring Network Settings


This task applies to standalone mode only. In standalone mode, you can configure video ports (media and H.323 TCP ports) and NAT settings.

Configure Video Ports

This option is available only in standalone mode. You can specify the media and signal traffic range to allocate to UDP and TCP ports respectively.

Note: When you set the media port or H.323 TCP port in the range of 1- 1024, RealPresence Desktop video collaboration software cannot work normally for SIP and H.323 calls.


Procedure

1. Select .
2. Select **Network**.
3. To specify media transmission range to allocate to UDP ports, enter the starting port number in the text box on the right of **Media Ports**.
The valid value is from 0 to 65515; the end ports are populated automatically.
4. To specify H.245 signal traffic range to allocate to TCP ports, enter the starting port number in the text box on the right of **H.323 TCP Ports**.
The valid value is from 0 to 65515; the end ports are populated automatically.
5. To reset the ports to their default values, which are 3230 and 3250, select **Reset**.
6. Select **OK** to save your settings.

Configure NAT

After you enable the NAT option, you must specify a public NAT address.

Procedure

1. Select .
2. Select **Network** and select **Use NAT**:
3. Select one of the following:
 - **Auto detect public (WAN) address** Select this check box to enable RealPresence Desktop video collaboration software to detect a public address automatically
 - **Manually input public (WAN) address** If you choose this option, you must type a public address in this field
4. Select **OK** to save your settings.

Enable Automatic Face Brightness Adjustment

Adjust your video brightness automatically to ensure proper face brightness.

Procedure

1. Select .
2. Select **General > Automatic Face Brightness Adjustment**, then select **OK**.

Set My Default Call Type

Choose your default call type as H.323 or SIP.


Procedure

1. Select .
2. Select **Call > Dialing Preference** and select an option.

Display Test Features

Test features are for evaluation only. The available test features may vary with releases.

Procedure

1. Select .
2. Select **Test Features**.
3. For the first time access, enter passcode 456.
4. Select desired features.
5. Select **OK** to save your settings.

Call Management

Topics:

- [Access Calling Features](#)
- [Call by Entering a Number](#)
- [Call from the Corporate Directory](#)
- [Call from Local Address Book](#)
- [Answer a Call](#)
- [Reject an Incoming Call](#)
- [End a Call](#)
- [Calling a SIP User Directly](#)
- [Controlling Meeting Using the In-call Toolbar](#)
- [Controlling Meeting Using the Touch Bar of MacBook Pro](#)
- [Call Icons](#)
- [View Recent Calls](#)
- [Change the Video Layout](#)

Using RealPresence Desktop video collaboration software, you can place and receive point-to-point calls. You can also join multipoint calls hosted by multipoint conferencing systems, such as Polycom® RealPresence® Collaboration Server products, and by endpoints with multipoint capabilities, such as Polycom® RealPresence® Series systems.

You can call contacts from your recent calls list or enter the contact numbers manually. If you register to a provisioning server, you can call contacts from your corporate directory. During a call, use the in-call toolbar to control your video, volume, and camera.

Access Calling Features

To place calls, manage contacts, or access recent calls list, you must select **Place a Call** on the home page.

Procedure

- » On the home page, select **Place a Call**.

Call by Entering a Number

You can use any of the following phone number formats to place a call:

- 2555: SIP user name, E.164 extension for H.323
- stereo.polycom.com: FQDN name
- user@domain.com: SIP_username@domain.com

- 0.11.12.13##1234:signaling IP##conference ID for H.323
- 1234@10.11.12.13: SIP user name@IP address
- 10.11.12.13: IP address

Procedure

1. Select **Place a Call**.
2. On the dialpad or your keyboard, enter a phone number.
3. Select **Call** to start the call.


Call from the Corporate Directory

LDAP service is enabled in managed mode. You can find and call contacts in the corporate directory.

Note: Ongoing Corporate Directory Search Cannot Be Canceled

After you enter a key word and start to search contacts, you cannot cancel this operation.


Procedure

1. Select **Place a Call**.
2. Select .
3. Enter part or all of name of the person to call, and then select **Enter**.
4. Select the contact name from the search list.
The devices belonging to this contact will be listed. You can select to call any of the devices.

Call from Local Address Book

You can call contacts in your local address book.

Procedure

1. Select **Place a Call**.
2. Select .
3. Select the contact name from the **Favorites** or **Frequently Used** list.
The contact's available endpoint list appears.
4. Select an endpoint to place the call.

Answer a Call

Unless **Auto-answer incoming calls** is enabled, you are prompted when there are incoming calls. You can answer or reject the call.

Procedure

- » Select .

Related Links

[Answer Incoming Calls Automatically](#) on page 11

Reject an Incoming Call

You can reject incoming calls if you didn't set answering calls automatically.

Procedure

- » Select .

End a Call

You can end an ongoing call.

Procedure

- » Select .

Calling a SIP User Directly

When the far end is registered with SIP only and the devices of the far end have the same SIP URI, you will see the **Call User** button when browsing the contact list or contact search list, as shown next. When you click the **Call User** button, all the devices with the same SIP URI will ring.

To choose a SIP device to answer, you must set each SIP device to answer manually; otherwise, the first device in the URI list that is set to auto answer will answer the call each time.

When the far end is registered with SIP only, but all the devices on the far end have different SIP URIs, you will see the **Call User** button. After you select the **Call User** button, you can select from the list of devices to place your call.

Controlling Meeting Using the In-call Toolbar

During a call, you will see the in-call toolbar on the bottom of the screen. Use the in-call toolbar to access additional features of the RealPresence Desktop video collaboration software application.



Related Links

[Controlling Meeting Using the Touch Bar of MacBook Pro](#) on page 23

View Network Call Statistics

During a call, you can view call statistics such as call type, call rate, and call protocol.


Procedure

- » On the lower-left of your screen, select .
- The  icon changes according to your network signal strength.

Show or Hide Local Self-View

You can show or hide your own video stream in the meeting window during a meeting. Showing or hiding your video does not mute your video stream to other participants.



Procedure

- » Select  or  to hide or show your self-view.

Maximize or Restore Application Window

You can maximize or restore the RealPresence Desktop video collaboration software application window.



Procedure

- » Select  or  to maximize or restore the application window.

Pause or Start Your Video

When you mute your video or join a meeting without a camera, your video stream is replaced with your profile picture (if set), or a placeholder picture.

Procedure

1. Select  or  to pause or start your video.

Mute or Unmute Your Microphone



You can mute your microphone when you don't want to speak in a meeting.

Procedure




- » Select  or  to mute or unmute your speaker.

Adjust Your Speaker Volume

You can adjust your speaker volume or mute it.

Note: When your system speaker is muted,  appears on the speaker button  and you see a tooltip "Your system speaker is muted." You must unmute your system speaker before you can adjust the speaker volume.

Procedure

- » At the bottom of the screen, do one of the following:
 - To adjust your speaker volume, select  and then drag the microphone slide bar.
 - To mute your speaker, select  then drag the slide bar until the icon changes to .

Far End Camera Control

If you are the chairperson, you can use Far End Camera Control (FECC) to control a far-end participant's camera.



FECC is available only when the following requirements are met:













- FECC is enabled in your RealPresence Collaboration Server conference profile.
- Chairperson passcode is set for the meeting.
- The meeting is an H.323 AVC call.
- At least one of your far-end participants have a PTZ camera and his or her endpoint supports FECC.

Control the Far-End Camera

A chairperson can access the DTMF menus to control other far-end PTZ cameras.

Procedure



1. At the bottom of the screen, select .
2. Select .

The DTMF controls appear.
3. Select  or  to activate the DTMF main menu.
4. Select  or  to highlight **Camera Control**, then select  or  to select the option.
5. Select , , , or  to select a target participant.
6. Select  to zoom out, or  to zoom in.

Select Audio and Video Preferences During a Meeting

You can select the audio and video components during a meeting.

Procedure

1. Select .
2. Select .
3. In the **Call Settings** pane, choose the following:
 - **Microphone**
 - **Speaker**
 - **Device**

Related Links

[Configure Audio Devices](#) on page 14

[Configure Camera](#) on page 15

Hide or Show More In-call Controls

You can hide the in-call controls that you have enabled.

Procedure

- » Select .

Controlling Meeting Using the Touch Bar of MacBook Pro

If your device is MacBook Pro[®] with Touch Bar, you can use the Touch Bar to control meetings.

Note: This feature is not available during content sharing.

During a meeting, in-call toolbar is available both on the application screen and on the Touch Bar of the MacBook Pro.

You can tap in-call toolbar icons on the Touch Bar to do the following:






- Answer or reject an incoming call
- Hide or show local view
- Mute or unmute your video
- Mute or unmute your microphone
- Mute or unmute your speaker
- Hang up a call

Related Links

[Controlling Meeting Using the In-call Toolbar](#) on page 20

Call Icons


The following table explains call icons.

Icons	Description
	Incoming calls
	Outgoing calls
	Missed calls
	Number of audio-only participants.
	Number of video enabled participants

View Recent Calls

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



Procedure

1. Select **Place a Call**.
2. Select .
3. Select the call that you want to review.

Change the Video Layout

You can change the video layout in a call hosted by the Polycom RealPresence Collaboration system.

Procedure

1. Select  and select .
2. To display the layout options, select the asterisk (*) twice.
You are connecting to the Polycom RealPresence Collaboration virtual meeting room.
3. Select the number that corresponds to the layout that you want to use.

Managing Contacts

Topics:

- [Access Contacts](#)
- [Add a Contact to Your Local Address Book Manually](#)
- [Add Contacts from the Corporate Directory to Your Local Address Book](#)
- [Edit a Contact in Your Local Address Book](#)
- [Search for a Contact](#)
- [Delete a Contact](#)
- [View Organization Hierarchy](#)
- [Importing and Exporting User Profile](#)

The RealPresence Desktop video collaboration software application enables you to access contacts from two sources.

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

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

Access Contacts

To place calls, manage contacts, or access recent calls list, you must select **Place a Call** on the home page.

Procedure

- » On the home page, select **Place a Call**.

Add a Contact to Your Local Address Book Manually



You can add contacts to your local address book, and edit the contact information.

Note: After you add and save a contact's information, you cannot modify the following fields:

- Last Name
 - First Name
 - Device Name
 - Device Type
-

Procedure


1. Select **Place a Call**.

2. Select , and then select .
3. Enter the contact's **Last Name** and/or **First Name**.
4. (Optional) Enter identifying information about the contact:
 - Last Name and First Name
 - Title
 - Department
 - Phone
 - Location
 - Email
5. Select **Add a device**.
6. Enter the **Device Name** and select the device from the **Device Type** drop-down list
7. Complete at least one of the following fields.
 - **IP Address** IP address of the contact's endpoint.
 - Enter the number that gatekeepers use to identify this system. Your organization's dialing plan may define the numbers you can use for enterprise net.
 The IP Address and H.323 Extension fields are independent fields. When you want to use an IP address and an H.323 extension together, you can enter the whole address in the IP Address field (for example, 74.118.238.100##1000)
 - **H.323 Name** Enter the name to display to the far site during calls. Your organization's dialing plan may define the names you can use for enterprise net.
 - **SIP URI** Enter the SIP Uniform Resource Identifier (URI) of the system.
8. Select **Save** twice. This contact is added to your **Favorites** list.

Add Contacts from the Corporate Directory to Your Local Address Book

You can add contacts from your corporate directory to local address book to access them quickly.

Procedure


1. Select **Place a Call**.
2. Select .
3. Enter part or all of name of the contact to search.
4. Select the contact name from the search results.
5. Select the device name of the contact.
6. Select **Save to Favorites**.

Edit a Contact in Your Local Address Book

You can edit contact information after you create it.

Note: If you re-add a contact from your corporate directory to your local address book, your edits will be lost.


Procedure

1. Select **Place a Call**.
2. Select .
3. Select the contact number you want to edit.
4. Select **Edit Favorite**.
5. Edit the contact information.
6. Select **Save**.

Search for a Contact

When you search in your corporate address book or local address book, only the people and endpoints that can be called from are returned. You can enter a part of a key word to do the search.


Procedure

1. Select **Place a Call**.
2. Select .
3. Enter part or all of name of the contact to search.

Delete a Contact

You can delete contacts from your local address book.

Procedure


1. Select **Place a Call**.
2. Select .
3. Select the contact that you want to delete.
4. Select **Delete** and then select **OK**.

View Organization Hierarchy

You can view the hierarchy of your organization.

This feature is available only in managed mode and only if you have permission to view the address on the server.

Procedure

1. Select **Place a Call**.
2. Select .
3. Select the **Organization** tab to see the hierarchy of your organization.

Importing and Exporting User Profile

This feature is available in both managed mode and standalone mode. You can export user data from one RealPresence Desktop video collaboration software application and import it into another.


Please observe the following:

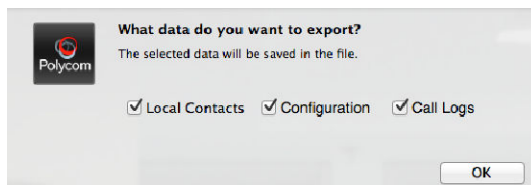
- LDAP contacts saved in the local contacts and local contacts can be imported and exported.
- Dialing preferences cannot be imported and exported.
- Test features are also exported and imported.

Export User Profile

You can export profile files from one RealPresence Desktop video collaboration software application and import it into another RealPresence Desktop video collaboration software application.

Procedure

1. Log into RealPresence Desktop video collaboration software.
2. Click or tap  on the application's title bar.
3. Select **Export User Profile** as shown in the next figure.




4. Specify the file name and save the file.
5. Select the user data that you want to export.
6. Select **OK** to export the data.

Import User Profile

You can export profile files from another RealPresence Desktop video collaboration software application and import the profile file into your RealPresence Desktop video collaboration software.

Procedure

1. Log into RealPresence Desktop video collaboration software.
2. Click or tap  on the application's title bar.
3. Click **Import User Profile**.
4. Select the file containing user data.
5. Select the user data that you want to import from the file.
6. Select **OK** to import the data. After the data is imported successfully, RealPresence Desktop video collaboration software will restart to apply the changes.

Sharing Content

Topics:


- [Share Content](#)
- [Maximize and Restore Your View](#)
- [Stop Content Sharing](#)

To enhance the collaboration experience, you can share documents, presentations, and other content with the meeting attendees.

Share Content

You can share content during a call .

Procedure

1. Select .
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**.

Related Links

[Configure Call Rate](#) on page 12

[I Cannot Find the Content Button](#) on page 38

[Share Your Monitor or Application with the Paired System](#) on page 32

Maximize and Restore Your View

During content sharing, you can maximize the video and content windows, or restore them.

Procedure

- » Double-click or -tap within the window area.

Stop Content Sharing

You can stop sharing your content during the meeting.

Procedure

- » On the Content Sharing toolbar, select **Stop**.

Using Polycom[®] SmartPairing[™]

Topics:

- [Enable SmartPairing Auto Detection](#)
- [Share Your Monitor or Application with the Paired System](#)
- [Use Your Device as the Paired System's Remote Controller](#)

You can pair your device with a Polycom HDX or RealPresence Group Series system using Polycom[®] SmartPairing[™] to perform the following tasks:

- **Share your monitor or application with the paired system** You can share your monitor or application with paired Polycom HDX or RealPresence Group Series systems.
- **Use your device as the paired system's remote controller** You can control the paired Polycom HDX or RealPresence Group Series system (for example, place a call, adjust the call volume or end the call) using your application.

You need to enable the SmartPairing feature and Telnet on the paired HDX or RealPresence Group Series systems for this feature to operate.

Related Links

[Enable Music Mode](#) on page 36

[Enable Polycom NoiseBlock](#) on page 15



Enable SmartPairing Auto Detection

You can enable SmartPairing **Auto Detection** to find nearby Polycom HDX or RealPresence Group Series systems automatically.

Note: Do not use Mac noise reduction on its internal microphone because it may cause echo in a call or impact SmartPairing auto detection. To disable Mac noise reduction, go to Mac System Settings, **Sound > Input**, uncheck **Use ambient noise reduction**.

Note: Auto Detection is not available if you are using Polycom[®] MusicMode[™].

Procedure

1. Select .
2. Select .
3. Select the **SmartPairing > Auto Detection** check box.

Related Links

[SmartPairing Detection Issues](#) on page 39

Share Your Monitor or Application with the Paired System

You can share your monitor or application with paired Polycom HDX or RealPresence Group Series systems.

Procedure

1. Select **Connect to Room**.
2. Select **Share Content**.
3. Do one of the following:
 - Select a device from the **System Detected** list.
 - Enter a device address in the **Room system IP** field.
4. Select **Pair**.
5. 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**.
6. To stop sharing, select **Stop Sharing**.

Related Links

[Share Content](#) on page 30

Use Your Device as the Paired System's Remote Controller

You can control the paired Polycom HDX or RealPresence Group Series system (for example, place a call, adjust the call volume or end the call) using your RealPresence Desktop video collaboration software application.

Procedure

1. Select **Connect to Room**.
2. Select the **Room Control** button.
3. Do one of the following:
 - Select a device from the detected system list.
 - Specify a device address in the **Room System IP** field.
4. Select **Pair**.
5. Use the following options to control calls on the paired device.
 - **Place a call** Enter a desired number on the dialpad to place a call on the paired device.
 - **Mute** Mute or unmute the call.
 - **Volume** Adjust the call volume.

- **DTMF** Open the DTMF keypad to enter a passcode.
- **Hang up** End the call from the paired device.

You can also enter a DTMF passcode using your keyboard without showing the DTMF keypad during a call.

DTMF feature works only when the DTMF keypad is not shown. When you open the DTMF keypad, you can use the keypad only to enter the passcode.

6. Select the **Unpair** button to end the control.

Chat and Presence

Topics:

- [Presence Statuses](#)
- [Chat with a Contact](#)
- [Chat with Meeting Attendees During Video Call](#)

After you log in and register to a Polycom provisioning server (such as RealPresence Resource Manager system) successfully, you can view your name and set your presence status. After you add other people to your contacts and they accept your invitation, you can also view other people's status.

Please observe the limitations on this feature:

- The chat and presence features work properly on RealPresence Resource Manager 8.0 or higher.
- The chat and presence features are available only in managed mode.
- Only Polycom® Video Border Proxy™ (VBP®) ST series and Polycom® RealPresence® Access Director™ support firewall NAT.
- The chat and presence features can be enabled or disabled together.

Presence Statuses

The following presence statuses are available:

- **Available** You are online.
- **Busy** You are busy and do not want to be disturbed. When your status is Busy, you can still get messages, but you will not be informed of received messages until you activate.
- **Away** You have signed in and you have been away from your computer for a certain time.
- **Offline** You cannot set your status to **Offline**. If a person is not logged in to the system, his or her status appears as **Offline**.
- **Unknown** The system cannot find any information of your contact from your company's server. Before you add a contact, the status of this contact is unknown.

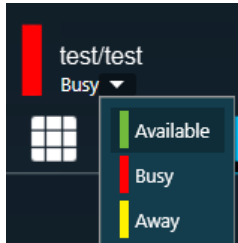
If you find yourself in the address book, the status of your endpoints is unknown. Other people who have added you to their contacts can see your correct status.

Change My Presence Status

You can change your presence status.

Procedure

- » On top of your screen, select the presence drop-down list below your user account and select an option.





Chat with a Contact

You can chat with anyone on your contacts list. You can use both chat and video at the same time.

When you chat with a person in your contacts list, you can select the **Call** button to make calls directly to the person whom you are chatting with.



Procedure

1. Select **Place a Call**.
2. From the top menu, select .
3. Select  to select or search for a contact and type your message.
4. Select **Send Message** or press **ENTER** to send your message. If the presence status of the contact is **Unknown**, you can also send messages. The person will receive the messages only after signing in.

Chat with Meeting Attendees During Video Call

You can chat with meeting attendees during a video call.

Procedure

1. Select  from the in-call toolbar.
2. Select  to select or search for a contact and type your message.
3. Select **Send Message** or press **ENTER** to send your message.

Polycom[®] MusicMode[™]

Topics:

- [Enable Music Mode](#)
- [Disable Music Mode](#)
- [Calibrate Noise Floor](#)
- [Disable Acoustic Echo Canceler](#)

With Polycom[®] MusicMode[™] technology, RealPresence Desktop video collaboration software can now accurately reproduce live music picked up by microphones. Remote listeners can hear the true sound of distant instruments and voices, enhancing distance learning and the overall listening experience.

Note: You are recommended to enable the Music Mode technology only in cases where you want to reproduce music from the far end, for example, distance music learning or a concert.

Enable Music Mode

You can enable the Music Mode technology before a meeting starts.

Note: The following features are disabled when you enable the Music Mode:

- Polycom[®] NoiseBlock[™]
 - Polycom[®] Acoustic Fence[™]
 - Auto Detection of Polycom[®] SmartPairing[™]
 - Automatic Gain Control
-

Procedure

- » Enter #68742# on your dialpad.

You are prompted that the MusicMode technology is activated.

You can find the option **Music Mode** under **Settings**.

Related Links

[Using Polycom SmartPairing](#) on page 31

[Enable Polycom NoiseBlock](#) on page 15

Disable Music Mode

Polycom Music Mode technology is disabled by default.

You can disable the Music Mode technology before a meeting starts.

Procedure

- » Enter #68742# on your dialpad.


You are prompted that the Music Mode technology is disabled.

Calibrate Noise Floor

To remove acoustic echo for optimal music experience, you need to calibrate the noise floor manually before using the MusicMode technology. Recalibrate the noise floor each time your environment changes, for example, after you moved to another place or changed the microphone volume.

Note: If you select **Disable Acoustic Echo Canceler**, **Calibrate Noise Floor** option becomes unavailable.

Procedure

1. Go to **Device > Microphone**. Select the desired microphone for using with the MusicMode.
2. Do one of the following:
 - Before a meeting starts, select **Music Mode**.
 - During a meeting, select  if Audio Meter isn't available.
3. If the current **Input Level** is indicated as yellow or red, adjust your **Mic Volume** to make it green. The recommended **Input Level** range is -12 — -96 dBFS.
4. Select **Calibrate Noise Floor**.

A green progress bar appears on the bottom of the **Calibrate Noise Floor** button.

The system prompts you to re-calibrate the noise floor if the **Mic Volume** is changed.

Disable Acoustic Echo Canceler

If you are using another Acoustic Echo Cancellation application, you may need to disable RealPresence Desktop video collaboration software Acoustic Echo Canceler to avoid unexpected problems.

Procedure

- » Select **Music Mode** and select **Disable Acoustic Echo Canceler**.

You cannot **Calibrate Noise Floor** when **Disable Acoustic Echo Canceler** is selected.

Troubleshooting

Topics:


- [Send Application Log Files](#)
- [Access the User Guide](#)
- [I Cannot Find the Content Button](#)
- [SmartPairing Detection Issues](#)
- [I See an Exclamation Mark on the Microphone Icon](#)
- [Prevent RealPresence Desktop video collaboration software to Take Exclusive Control of the Microphone](#)
- [H.323 Registration Problems](#)

If you're having problems, try the troubleshooting tips below first.

Send Application Log Files

You can view or send the log files to your administrator to help determine causes of and solutions to problems.

Procedure

1. Select  on the application's title bar.
2. Select **Log Collector**.
3. Enter the recipient's email address.
4. Do one of the following:
 - To view it, select **Open the Local Folder** and open the .zip log file.
 - To send it to another person, enter the recipient's email address, then select **Send**.

Access the User Guide

You can access the online User Guide from within the application.

Procedure

- » Select **HELP** or .

I Cannot Find the Content Button

Your call rate is too low to support content sending or receiving. Disconnect, increase your call rate in **Settings**, and re-dial.

Your conference hosting server, the Polycom® RealPresence® Collaboration Server, sets the minimum call rate for each content video type. Contact your system administrator for more information.

Related Links

[Configure Call Rate](#) on page 12

[Share Content](#) on page 30

SmartPairing Detection Issues

You may come across the following problems when using SmartPairing:

- If no device can be detected, check the following:
 - Ensure that SmartPairing and Telnet are enabled on the Group Series and HDX system.
 - Ensure that **Ambient noise reduction** is disabled under **System Preferences > Sound**.
- When there are several HDX or RealPresence Group Series systems nearby that are all configured to support ultrasound-based auto detection, your RealPresence Desktop video collaboration software application may fail to detect them all, or may return incorrect IP addresses. In this case, you need to enter the IP address manually.
- If you set the ultrasound as manual mode and set a passcode for remote access on HDX, RealPresence Desktop video collaboration software cannot pair with this HDX.

Related Links

[Enable SmartPairing Auto Detection](#) on page 31

I See an Exclamation Mark on the Microphone Icon

The microphone icon changes to  in one of the following cases:

- Your system microphone is muted. You must unmute your system microphone before others can hear you.
- Your environment is noisy. Move to a quieter place.

Prevent RealPresence Desktop video collaboration software to Take Exclusive Control of the Microphone

When you start RealPresence Desktop video collaboration software, the microphone is used only by RealPresence Desktop video collaboration software; other applications cannot use the microphone.


Procedure

- » Go to the Windows Control Panel (usually **Control Panel > Sound > Recording > Microphone > Properties > Advanced**) and clear the **Allow applications to take exclusive control of the device** check box.

Related Links

[Configure Audio Devices](#) on page 14

H.323 Registration Problems

If RealPresence Desktop video collaboration software fails with H.323 registration, you will see an alert  10.220.62.174 on the bottom right of the GUI. The following operation may cause H.323 registration failure.

- When you sign into different RealPresence Desktop video collaboration software instances using the same user account, the second one that you sign into will fail with H.323 registration due to the duplicated alias.

You need to wait for 30 seconds to sign in to the second RealPresence Desktop video collaboration software instance.

- When the XMPP service stops working, you need to use different user IDs to sign in different RealPresence Desktop video collaboration software instances. If you use the same user ID to sign into more than one RealPresence Desktop video collaboration software, the second one will fail to register H.323 with the duplicate alias error.

Related Links

[Configure H.323 Settings \(Standalone Mode Only\)](#) on page 13