



USER'S GUIDE

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RealPresence[®] CloudAXIS[™] Suite



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About This Guide

This user guide shows you how to create and participate in recordable online web conference meetings from the Services Portal in the Polycom® RealPresence® CloudAXIS™ Suite.

This section contains common terms, descriptions of writing conventions, and a description of the user guide contents.

Conventions Used in this Guide

This user guide contains terms, graphical elements, and typographic conventions. Familiarizing yourself with these terms, elements, and conventions will help you perform video conferencing tasks.

Terms and Writing Conventions



As you read this guide, you will notice the same terms and conventions are used repeatedly. Make sure you familiarize yourself with these terms and conventions so you understand how to perform video conferencing tasks.






- **Attendee** An attendee refers to anyone participating in a CloudAXIS meeting.
- **Presenter** Presenters are granted special privileges, including the ability to share content, assign presenter rights, and end a meeting. The meeting creator is automatically given presenter rights, and more than one participant can be granted presenter rights during a meeting.
- **Participant** Participants receive audio and video experience and can view content.
- **Meeting** Meetings are active web conferences with a presenter and one or more participants.
- **Content Share** Content share displays the presenter's full desktop to everyone in the meeting. Only participants with presenter rights can share content.

Information Elements

The icons described in the following table are used to alert you to various types of important information in this guide

Icons Used in this Guide

<i>Name</i>	<i>Icon</i>	<i>Description</i>
Note		The Note icon highlights information of interest or important information needed to be successful in accomplishing a procedure or to understand a concept.
Caution		The Caution icon highlights information you need to know to avoid a hazard that could potentially impact device performance, application functionality, or successful feature configuration.

<i>Name</i>	<i>Icon</i>	<i>Description</i>
Web Info		The Web Info icon highlights supplementary information available online such as documents or downloads on support.polycom.com or other locations.
Timesaver		The Timesaver icon highlights a faster or alternative method for accomplishing a method or operation.
Power Tip		The Power Tip icon faster, alternative procedures for advanced administrators already familiar with the techniques being discussed.
Troubleshooting		The Troubleshooting icon highlights information that may help you solve a relevant problem or to refer you to other relevant troubleshooting resources.
Settings		The Settings icon highlights settings you may need to choose for a specific behavior, to enable a specific feature, or to access customization options.

Typographic Conventions

A few typographic conventions, listed next, are used in this guide to distinguish types of in-text information.

Typographic Conventions

<i>Convention</i>	<i>Description</i>
Bold	Highlights interface items such as menus, soft keys, file names, and directories. Also used to represent menu selections and text entry to the User Interface.
<i>Italics</i>	Used to emphasize text, to show example values or inputs, and to show titles of reference documents available from the Polycom Support Web site and other reference sites.
Blue Text	Used for cross references to other sections within this document. If you click text in this style, you will be taken to another part of this document.
<code>Courier</code>	Used for code fragments and parameter names.

Get Started

The CloudAXIS Services Portal enables you to create and participate in recordable online video conference meetings. Depending on the organization's policy, you can also invite contacts on Facebook or Google Talk to join the meetings. Before you get started using the portal, be sure your system meets the basic requirements listed in this chapter.

This chapter introduces these basic requirements and is divided into the following sections:

- [Software Requirements](#)
- [Hardware Requirements](#)
- [Bandwidth, Video Format, and Resolution](#)
- [Language Packs](#)

See the remainder of this user guide for information about creating and participating in meetings.

This section shows you the minimum system, hardware, browser, software, network, and bandwidth requirements. Confirm that your system meets requirements listed in this chapter before using the portal. If you experience issues with the requirements, see [Troubleshoot Issues](#).

Software Requirements

For computers and laptop devices using CloudAXIS, the Services Portal supports operating systems including Windows XP, Vista, Windows 7, or Windows 8 for PCs. For Apple Macs, the portal requires Snow Leopard, Lion, or Mountain Lion.

Tablets or phones must be capable of running the Polycom RealPresence Mobile application. Refer to the latest release notes for Polycom RealPresence Mobile at www.support.polycom.com for a list of compatible devices.

CloudAXIS installs two plug-ins that enable video and social features:

- **CloudAXIS Client Plug-in** Enables SIP/HTTPS audio/video services and is downloaded when you access CloudAXIS from a device for the first time.
- **CloudAXIS Social Plug-in** Enables access to Facebook and Google Talk contact lists and is downloaded when you access social connectors from a device for the first time.

Use one of the following browsers to schedule or attend a CloudAXIS meeting.

- Microsoft Internet Explorer v8.0 or later
- Mozilla Firefox v14.0 or later
- Google Chrome v11.0 or later
- Apple Safari v5.0.6 or later

Hardware Requirements

A computer using the Polycom RealPresence CloudAXIS Suite requires hardware outlined in the following table.

Hardware Requirements

<i>Component</i>	<i>Description</i>
Processor	Processor Intel Core i5, 2.5 GHz or larger
RAM	2 GB
Video memory	256 MB or more
Hard drive space	200 MB
Camera	Integrated or external
Audio devices	Standard PC97 audio devices
Monitor	Recommended: 16:9, 1920x1080 Minimum: 1024x768

Bandwidth, Video Format, and Resolution

The Polycom RealPresence CloudAXIS Suite supports the bandwidth, video format, and pixel resolution outlined in the following table.

Supported Bandwidth, Video Format, and Resolution

<i>Bandwidth</i>	<i>Video Format</i>	<i>Pixel Resolution</i>
64 kbps–511 kbps	QVGA	320x240
512 kbps–1023 kbps	VGA	640x480
1024 kbps–1920 kbps	720p (HD)	1280x720

NOTE: Bandwidth is regulated by the RealPresence DMA.

Language Packs

Go to **Language > View Supported Languages** to view a list of languages supported in your Experience Portal.

To set your browser to display your desired language, see the language download instructions for the browser you are using.

Create and Manage Meetings

The Services Portal allows you to set up meetings that start immediately or meetings that are scheduled to occur at a later time. To create meetings, you must have a user or admin account on the Services Portal. With a valid web address and login credentials, you can log in to the portal and select the type of meeting you want to create.

- If you choose to start a meeting immediately, a meeting interface opens in your web browser and enables you to start inviting and interacting with participants.
- If you want to schedule a meeting to occur at a later time, enter the date, time, and other meeting parameters, and invite participants. The portal adds the scheduled meeting to a calendar and sends an email with a web URL link to the invited attendees. At the scheduled meeting time, attendees open the web URL to join the meeting.

The portal allows users to attend meetings, share desktop content, manage video and audio privacy, and chat online with other meeting attendees. For information on using the portal features, see [Participate in Meetings](#).



Note: End User License Agreement (EULA)

The CloudAXIS Social and Client Plug-ins require acceptance of a EULA before you can continue using the software. View the EULA for your product at <http://support.polycom.com/PolycomService/home/home.htm>

The following sections show you how to create and manage meetings in your organization's CloudAXIS environment. Topics include:

- [Open the Portal User Interface](#)
- [Manage Your Meetings](#)
- [Manage Contacts](#)
- [Manage Your Personal Profile](#)

Open the Portal User Interface

Log in to the Services Portal to create, schedule, join, and manage your meetings.

To log in to the Services Portal:

- 1 Obtain user or admin account login credentials from your CloudAXIS administrator.
- 2 Start a web browser, and enter the fully qualified domain name (FQDN) of the Services Portal to open the login screen.
- 3 On the Polycom RealPresence CloudAXIS login page, enter your login credentials in the **USERNAME** and **PASSWORD** fields to open the user interface.

Manage Your Meetings

You can start a meeting immediately or schedule one to begin at any time in the future. The Services Portal user interface also allows you to change the date, time, and other details of any meeting you have scheduled.

Schedule a Future Meeting

To schedule a meeting to start at a later date:

- 1 Log in to the Services Portal with the user account credentials obtained from your CloudAXIS administrator.
- 2 Select the **Schedule** tab to open the **Schedule a Meeting** screen.
- 3 In the **Schedule a Meeting** screen, enter the meeting information, as outlined in the following table.

CloudAXIS Schedule a Meeting Screen

<i>Field</i>	<i>Description</i>
Meeting Name	(Optional) Enter a name describing the purpose of your meeting.
Agenda	(Optional) Enter a description of the topics to be covered in the meeting. Information entered here is sent to all the invited participants.
Date and Time	Click inside the text box to display a calendar that you can use to choose the day. Use the Hour and Minute sliders to schedule the start time. When you are finished, click Done .
Duration	Click inside the text box, and then use the Hour and Minute sliders to set the meeting duration. Then click Done .
Use Personal VMR	(Optional) If you want to conduct the meeting using your personal VMR (virtual meeting room) number, select the Use Personal VMR check box.
Invite People	Use one of the following procedures to enter the e-mail addresses of the people that you are inviting to the meeting. <ul style="list-style-type: none"> • Enter each e-mail address individually, separating each address with a semicolon (;). • Click ADD FROM CONTACTS to select contacts from your address book or enterprise directory from the Select Attendees screen. • Select From Address Book (direct address book search) and click Search to find your contacts from your local address book. Select the checkbox for each contact you want to include. Then click INVITE TO MEETING. For information about your address book, see Manage Contacts. • Select From Enterprise Users to search the active directory that you are connected to, and then click SEARCH to find your contacts. Select the checkbox for each contact you want to include. Then click INVITE TO MEETING.

<i>Field</i>	<i>Description</i>
Meeting Access	<p>(Optional) Select this check box to require user ID and password authentication for meeting attendees. Active Directory users are always required to enter their username and password credentials. When this checkbox is selected, local users are also required to enter their user ID and password.</p> <p>Please note:</p> <ul style="list-style-type: none"> • Select Only Enterprise Users to allow only attendees who are authenticated members of your organization. • Select All Users to allow both enterprise and guest attendees.
Meeting Passcode	<p>To require a passcode for users to enter a meeting, enter a passcode in this text box. The passcode must be numerical and can be as long as 10 characters. If an administrator has made a passcode mandatory, you must set a passcode for all scheduled and ad hoc meetings.</p> <p>Note that to ensure security of enterprise meetings, passcodes are not sent to users in the meeting invitation. You must communicate the passcode to the participants in a separate, preferably secure, communication.</p>

- 4 Click **SCHEDULE** to display the **Confirm Details** screen, similar to the one shown next.

Confirm Meeting Details

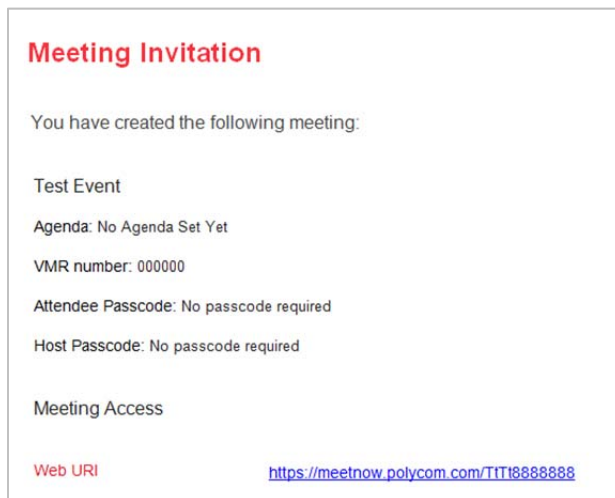
Confirm Details

Meeting Name	Event
Agenda	No Agenda Set Yet
Date and Time	Thu February 7, 2013 @ 11:46 am
Duration	01:00 Hrs

CONFIRM **EDIT** **CANCEL**

- 5 Verify the meeting details, and then click **CONFIRM**. Each invited participant receives a Meeting Invitation in an e-mail, and you receive confirmation that the meeting has been created, as shown next.

View the Meeting Invitation Details

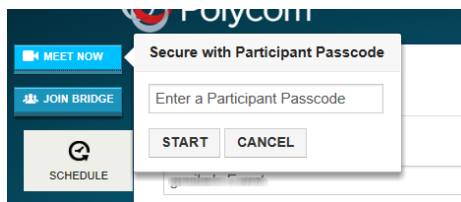


Start a Meeting Now

You can use the Meet Now option in the Services Portal to begin a meeting immediately.

To start a meeting immediately:

- 1 Log in to the Services Portal using the fully qualified domain name (FQDN) and user account credentials supplied by your CloudAXIS administrator.
- 2 On the Welcome screen, click **Meet Now**.
- 3 Do one of the following:
 - If a **Secure with Participant Passcode** dialog appears, enter a passcode that participants will use when they join the meeting.



- If the Welcome screen appears, select your video pre preferences and start the meeting. Then you can invite participants. See [Invite Participants While a Meeting is in Progress](#).

View Your Scheduled Meetings

You can view and sort through your scheduled meetings from the Calendar tab on the Services Portal.

To view your scheduled meetings:

- 1 Log in to the Services Portal using the fully qualified domain name (FQDN) and user account credentials supplied by your CloudAXIS administrator.
- 2 Select the **Calendar** tab.

- 3 In the **Calendar** screen, select one of the following options:
 - **Today** Displays all meetings you have scheduled for the current day. Click **Prev** or **Next** to navigate through your list of scheduled meetings for that day.
 - **Weekly** Displays your scheduled meetings per week. Click **Prev** or **Next** to navigate through your list of scheduled meetings per week.
 - **Monthly** Displays your scheduled meetings per month. Click **Prev** or **Next** to navigate through your list of scheduled meetings per month.

Start a Scheduled Meeting

After a meeting is scheduled, the portal sends each attendant an e-mail containing a web URL. Participants use the web URL to join the meeting. Meeting participants can interact with each other and share content only after a presenter has logged in to the meeting.

The meeting creator is automatically given presenter rights and can join the meeting directly from the portal or from the web URL sent in the e-mail notification. The meeting creator also can give a participant a special passcode to enter the meeting as a presenter.

This section explains how the meeting creator joins the meeting from the portal.


To join the meeting from the portal:

- 1 Log in to the portal using the fully qualified domain name (FQDN) supplied by your organization's CloudAXIS administrator.
- 2 Click the **Calendar** tab, and then select **Today** to locate the meeting.
- 3 Click **Host**. (Note that the **Host** option appears five minutes before the meeting is scheduled to start. The meeting creator, however, cannot log in until the time the meeting is scheduled.)
- 4 In the video preference screen, select your video preferences, and then click **Join**. See [Select Video Preferences](#) to help you determine which options to select.

Edit Details for a Scheduled Meeting

Scheduled meetings can be edited or deleted only by the person who set them up. When a meeting is edited, all invited participants receive a notification specifying the change. This section shows you how to edit and delete your meetings.

To edit details of a meeting you have previously scheduled:

- 1 Log in to the Services Portal using the fully qualified domain name (FQDN) and user account credentials supplied by your CloudAXIS administrator.
- 2 Click the **Calendar** tab.
- 3 Locate the meeting in your calendar as described in [View Your Scheduled Meetings](#).
- 4 Click the schedule  icon to open the **Schedule a Meeting** screen, shown next.

Edit a scheduled meeting

SCHEDULE A MEETING

Meeting Name

(Max 250 characters)

Date and Time

Agenda

No Agenda Set Yet

4983 characters remaining

Duration

Use Personal VMR

ADD FROM CONTACTS

Invite People

Please enter a semi-colon separated list of users. (E.g. person1-email@domain.com; person2-email@domain.com;...)

Meeting Access

All Users (Enterprise / Guest) ▼

Meeting Passcode

SCHEDULE

DISCARD

- 5 Click in the fields you want to edit, and change the text to reflect your desired changes.
- 6 When your changes are complete, click **Schedule**.
- 7 In the **Confirm Details** screen, verify the meeting details and click **Confirm**.
Each invited participant receives the updated meeting details in an e-mail.



Note: Host passcode responsibility

For security reasons, e-mail invites do not include the passcode set for the meeting. The Host must communicate the passcode to the participants in another, preferably secure, way.

Delete a Scheduled Meeting

You can delete a meeting that you have previously scheduled in the Services Portal. When you delete a meeting, all participants receive confirmation that the meeting has been cancelled.



Note: Deleting meetings

Only meetings that are scheduled for a date and time in the future can be deleted from the calendar. Meetings that are in progress or have been completed cannot be deleted from the calendar.

To delete your scheduled meeting:

- 1 Log in to the Services Portal using the fully qualified domain name (FQDN) and user account credentials supplied by your CloudAXIS administrator.
- 2 Click the **Calendar** tab.
- 3 Locate the meeting in your calendar as described in [View Your Scheduled Meetings](#).
- 4 Click the delete button **X** next to the meeting to delete the meeting and notify invitees that the meeting has been cancelled.

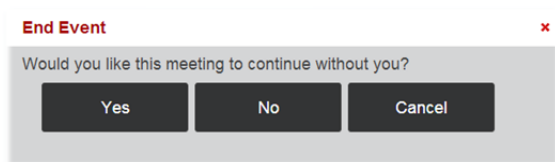
End a Meeting

Only a presenter can end a meeting. When a presenter ends the meeting, all attendees are automatically signed out.

To end a meeting:

- 1 Click the End Event icon  to open the **End Event** screen, as shown.

End a meeting



- 2 Click **Yes** if you want the meeting to continue without you; click **No** to end the meeting now.

Manage Contacts

You can store participant contact information in the portal Address Book for future invitations. This section shows you how to access the Address Book and add, edit, and delete contacts.

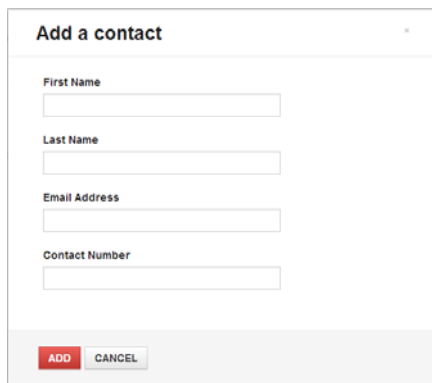
Add a contact

You can add any contact with a valid email address to the address book.

To add a contact:

- 1 Log in to the Services Portal using the fully qualified domain name (FQDN) and user account credentials supplied by your CloudAXIS administrator.
- 2 Click the **Address Book** tab to display the **Contacts** screen.
- 3 Choose **Add a Contact** to display the **Add a Contact** dialog, as shown.

Add-a-contact dialog




The screenshot shows a dialog box titled "Add a contact" with a close button (X) in the top right corner. It contains four text input fields: "First Name", "Last Name", "Email Address", and "Contact Number". At the bottom, there are two buttons: "ADD" (highlighted in red) and "CANCEL".

- 4 Enter the First Name, Last Name, Email Address, and phone number of the contact in the appropriate text boxes. Then click **ADD** to add the contact to the Address Book.

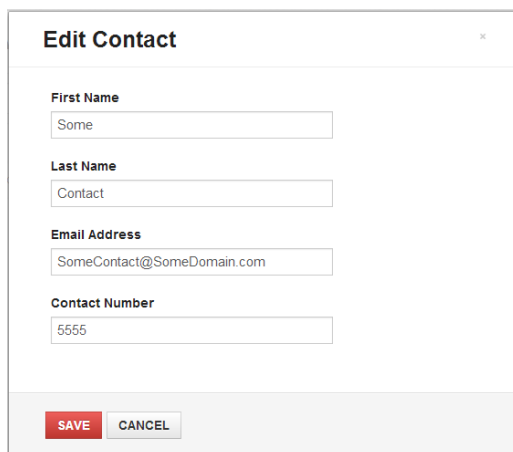
Edit a Contact

You can change any information saved in connection with an address-book contact, including their first name, last name, email address, or phone number.

To edit a contact:

- 1 Log in to the Services Portal using the fully qualified domain name (FQDN) and user account credentials supplied by your CloudAXIS administrator.
- 2 Click the **Address Book** tab to display the **Contacts** screen.
- 3 To search for the contact you want to edit, enter the contact name in the **Search Contacts** text box and click **Enter**, or use the scroll bar.
- 4 Click  next to the contact to open the **Edit Contact** screen, shown next.

Edit contact screen



The screenshot shows a dialog box titled "Edit Contact" with a close button (X) in the top right corner. It contains four text input fields with pre-filled values: "First Name" (Some), "Last Name" (Contact), "Email Address" (SomeContact@SomeDomain.com), and "Contact Number" (5555). At the bottom, there are two buttons: "SAVE" (highlighted in red) and "CANCEL".

- 5 Click in the text boxes to edit the information you want to change. Then click **SAVE**.

Delete a Contact


At any time, you can delete a contact that you want to remove from the address book.

To delete a contact:

- 1 Log in to the Services Portal using the fully qualified domain name (FQDN) and user account credentials supplied by your CloudAXIS administrator.
- 2 Click the **Address Book** tab to display the **Contacts** screen.
- 3 In the **Search Contacts** text box, enter the name of the person whose contact information you want to edit, and then click **Enter**. You also can use the scroll bar to look for the name.
- 4 Click **X** next to the contact name you want to delete.
- 5 In the **Delete this Contact?** Dialog, click **DELETE**.

Manage Your Personal Profile

This section shows you how to manage and change details in your Services Portal personal profile. The fields in the **Edit Personal Details** screen contain information that most frequently changes over a period of time for a user.

- 1 Log in to the Services Portal using the fully qualified domain name (FQDN) and user account credentials supplied by your CloudAXIS administrator.
- 2 Click the Personal Details icon  at the top right of the welcome screen to display the **Edit Personal Details** dialog.
- 3 Click in the appropriate text box to edit the information you want to change.
- 4 Confirm that your changes are correct, and then click **UPDATE**.



Note: Personal details and Active Directory

You cannot edit personal details if your CloudAXIS system uses Active Directory (AD) network authentication. Ask your system administrator how to change your contact information in your Active Directory profile if you need to make changes.

Participate in Meetings

The meeting creator logs in to the portal, invites participants, enters the meeting as a presenter, and assigns presenter privileges to participants. Presenters and participants view the meetings through the portal interface screen, which opens in a web browser and plays the audio and video streams for conference interaction.

The presenter and participant portal interfaces offer similar options, which include the ability for users to control their personal audio and video privacy, record the meeting, and participate in a group chat. The presenter can enable other presenters to assign presenter rights to participants, invite other participants while the meeting is in session, and end the meeting.

The next sections show you how to use the portal meeting interface in detail, including performing the following tasks:

- [Join a Meeting](#)
- [Select Video Preferences](#)
- [Share Content](#)
- [Manage Presenter Rights](#)
- [Record a Meeting](#)
- [Retrieve a Recording of a Meeting](#)
- [Invite Participants During a Meeting](#)
- [Control the Display Screen](#)
- [Manage Privacy Settings](#)
- [Change Hardware Settings](#)
- [Chat with Other Meeting Participants](#)
- [Use the DTMF Keypad](#)
- [Leave a Meeting](#)



Note: RealPresence Mobile users

If you are participating from a tablet or phone device using the RealPresence Mobile (RPM) application, see the [RPM support site](#) for useful information on using the application.

Join a Meeting

To join a meeting that you created, see [Start a Scheduled Meeting](#). If a meeting is in progress or just getting started, you can join it from the portal or from the URL supplied in the meeting invitation.

**Note: The Presenter must start the meeting before participants can interact with each other**

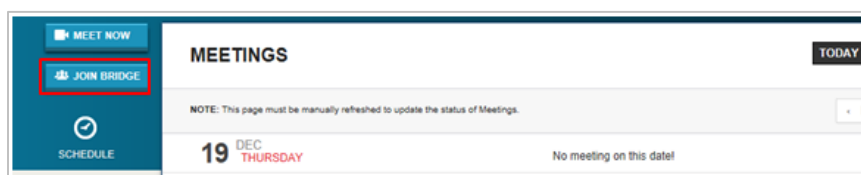
All meetings require the presenter to be logged in before the session can start; without the presenter, participants cannot see or interact with each other.

Join a Meeting from the Services Portal

If you are logged in to the portal, you can click the **Join Bridge** button join a meeting that is in progress.

To join a meeting from the Services Portal:

- 1 Log in to the Services Portal with the user account credentials obtained from your CloudAXIS administrator.
- 2 Click **Join Bridge** as shown next.



- 3 In the **Meeting ID** text box on the welcome screen, enter the Virtual Meeting Room (VMR) number assigned to the meeting.
- 4 In the **Passcode** text box, enter the meeting passcode if one is required.
- 5 In the video preference screen, select from the available video preferences. For help making selections, see [Select Video Preferences](#).
- 6 After selecting your video preferences, click **Join** to enter the meeting.

**Note: Join Bridge options**

The **Join Bridge** option button is displayed only if the CloudAXIS administrator has enabled it in your environment.

Join a Meeting from a Web URL

If you are not logged in to the Services Portal, you can join a meeting as a participant by using a web URL that appears in a chat message, calendar invitation, or e-mail that was sent when the meeting was created.

To join a meeting from a web URL:

- 1 From a PC running a compatible Windows OS, a Mac running a compatible Mac OS, or a mobile device supported by the RealPresence Mobile application, click the web URL associated with the meeting. You can also paste the web URL into the address bar of your web browser.

- 2 In the login screen, if required, enter the passcode given to you to enter the meeting.
- 3 When prompted, enter your e-mail address or network credentials, and then click **Sign In**.
- 4 In the video preference screen, select from the available video preferences. For help making selections, see [Select Video Preferences](#).
- 5 After selecting your video preferences, click **Join** to enter the meeting.

To join the conference from a mobile device:

- » Click **Launch Real Presence Mobile** from a device that has the RealPresence Mobile application. The application opens and dials into the conference automatically. If the RealPresence application is not installed, you are directed to the appropriate application store to install RealPresence Mobile.

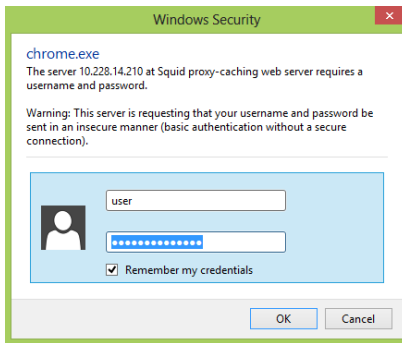


In a restrictive firewall environment, you might be able to join video conferences only in Limited Experience Mode. In this situation, after you click **Join**, you may be prompted to enter proxy credentials. Contact your system administrator to obtain them.

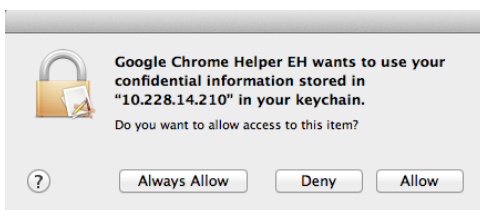
When you have joined a meeting in Limited Experience Mode, you will not be able to show or view shared content, and your session may be automatically adjusted to audio-only mode if network conditions necessitate it.

To join a meeting in an environment that requires proxy authentication:

- » From a Windows client, enter your proxy credentials in the dialog, and click **OK**.



- » From a Mac client, you can click **Always Allow** or **Allow** to retrieve previously entered proxy credentials from your system keychain.



Select Video Preferences

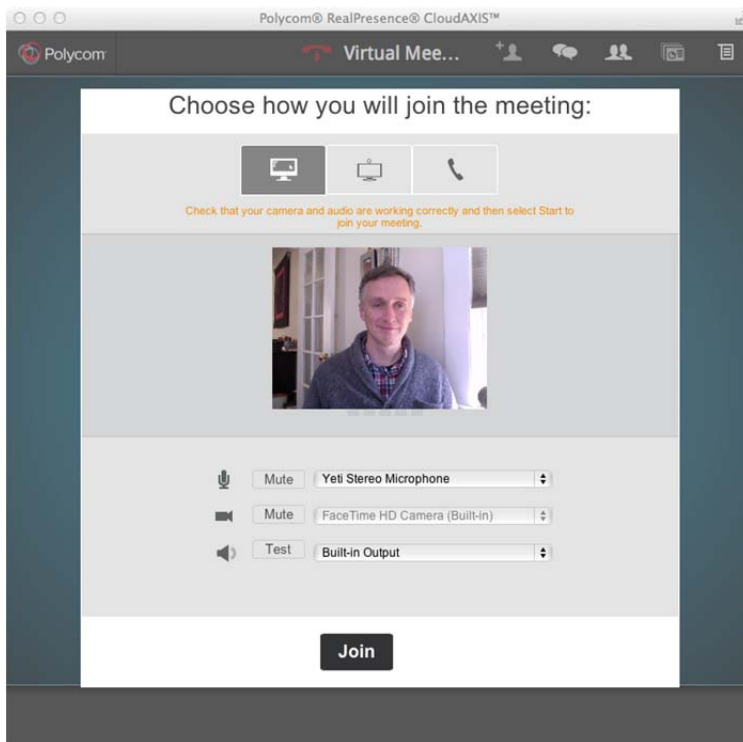
The video preference screen, shown next, displays video options you must choose before you enter a meeting. This screen opens in one of three ways:

- After a meeting creator clicks **Meet Now** in the Services Portal (See [Start a Scheduled Meeting](#)).
- When any participant joins a scheduled meeting from the portal.
- When a participant joins a meeting from an invitation delivered in an instant message or signs in to a meeting from an e-mailed URL.




To select video preferences before joining a meeting:

- » Select video preferences from the three options as shown in the CloudAXIS video preference screen and described in the following table.

CloudAXIS video preference screen



Video preference selections

Icon	Description
	<p>Click this icon to participate in the meeting from a device such as a PC or laptop. Other options include:</p> <p>Microphone The microphone options include a Mute button and a drop-down menu to select the microphone you want to use.</p> <p>Camera The camera options include a stop video display button to turn off your video camera and a drop-down menu to select the camera you want to use.</p> <p>Speaker The speaker options include a Test button to test your speakers and a drop-down menu to select the speakers you want to use.</p>
	<p>Click this option to access such features as group chat and roster while using a different device for video streams (such as a Polycom VVX® or HDX®). When this option is selected, you must choose either SIP or H.323 as your connection protocol. After you click this option, the interface to the meeting is launched. Click OK, I am in when you have successfully entered the meeting.</p>
	<p>Click this option to access features such as group chat and roster while using a phone instead of your camera and microphone. Click this option to reveal a phone number you must call to join the meeting. Click OK, I am in when you have successfully entered the meeting.</p>


Share Content

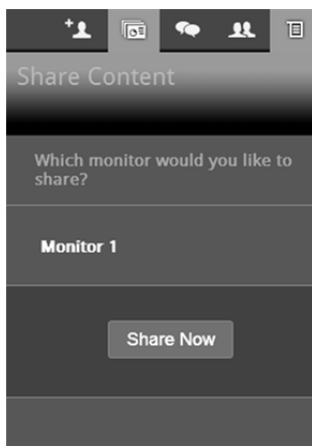
To enhance the collaboration experience, the CloudAXIS meeting environment allows users to share documents, presentations, and other content with other meeting participants.

Show Desktop Content to Other Meeting Participants

Only participants designated as presenters can share desktop content during a meeting. To learn how to assign presenter rights, see [Assign Presenter Rights](#)**Error! Not a valid bookmark self-reference.**. To learn how to request presenter rights, see [Request Presenter Rights](#).

To share content with other meeting participants:




- 1 On the portal interface screen, click the content icon  to display your **Share Content** options, shown next.



- 2 Select the monitor you want use (Example: **Monitor 1**).
- 3 Click **Share Now** to share your desktop in the meeting. The **Share Now** button changes to **Stop Sharing** and three icons appear at the top of your desktop, shown next. These icons control your microphone, video stream, and desktop sharing.



The red desktop icon indicates that your desktop is currently being shared with other meeting attendees

- 4 Do one or more of the following:
 - Click the microphone icon  to toggle your audio stream on or off.
 - Click the video icon  to toggle your video stream on or off.
 - Click the activated desktop icon  to stop sharing content from the desktop.



Settings: Content sharing in Limited Experience Mode

In Limited Experience Mode, content sharing is disabled, and the user cannot share or receive content. Limited Experience mode users see a tooltip notification of this restriction when they hover the cursor over the **Share Content** option.

View Shared Content

When a participant initiates content share, the content on the participant's screen becomes visible on the portal interface screen. Participants can control whether the content is viewable on their own screens.

To toggle the content share display on and off:

- » On the portal interface screen, click **View Content**.

Assign, Request, and Approve Presenter Rights

To share content in a CloudAXIS meeting, a participant must be granted presenter rights by someone who currently has presenter rights. The meeting creator automatically has presenter rights and can assign them to anyone who requests them. If you are attending a meeting and want to share content with other participants, you can request presenter rights from any presenter.

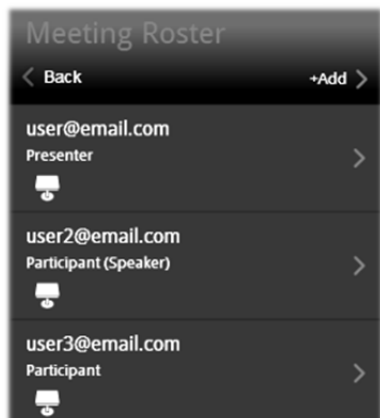
Assign Presenter Rights


Presenters assign presenter rights to other participants so that participants can share desktop content during a meeting. See [Request Presenter Rights](#) to learn how a participant can request presenter rights and share content during a meeting.

To assign presenter rights:

- 1 Click the roster icon  to open the **Meeting Roster** that lists name cards for each attendee, as shown next.

Meeting Roster screen





- 2 Locate the participant who will receive presenter rights, and then click the share icon  next to the participant's name.

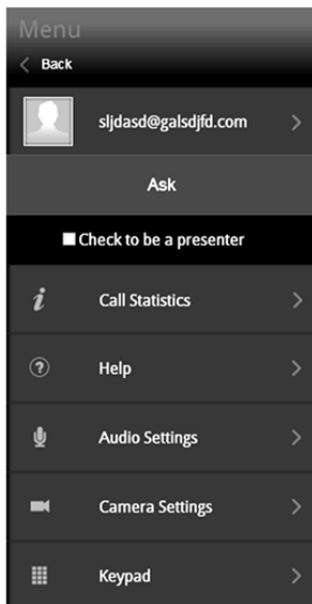
Request Presenter Rights

To share desktop content, meeting participants must be given presenter rights by a current presenter.

For instructions on how to share content during a meeting, see [Share Your Content](#).

To request presenter rights:

- 1 On the portal interface screen, click the menu icon  to display the main **Menu**, as shown next. (Note that instead of the main Menu, a previous menu selection may appear. If you do not see the main Menu options, click the Back button .)



- 2 Select the **Check to be a presenter** check box.
- 3 Click **Ask** from the **Main** menu. The request is sent to the presenter.
See [Assign](#), [Request](#), and [Approve Presenter Rights](#)

To share content in a CloudAXIS meeting, a participant must be granted presenter rights by someone who currently has presenter rights. The meeting creator automatically has presenter rights and can assign them to anyone who requests them. If you are attending a meeting and want to share content with other participants, you can request presenter rights from any presenter.

Assign Presenter Rights to learn how a presenter assigns these rights.



Approve Presenter Rights

Only presenters can receive and approve requests for presenter rights, which allow participants to share desktop content during a meeting. When participants request presenter rights, a blue bubble appears next to their names in the roster, along with a sequential number for each request.

This section shows you how to approve a participant's request for presenter rights if you are a presenter.

For information on how to request presenter rights, see [Request Presenter Rights](#).

To approve presenter rights:

- 1 Click the attendee icon . The **Meeting Roster** displays the name card for each attendee in the meeting. The name cards of participants who have requested presenter rights flash off and on.
- 2 Click the contact icon  associated with the flashing name card of the user for whom you want to approve presenter rights.

Record a Meeting


Only a presenter can record a meeting. A meeting recording includes all of the video, audio, group chat, and shared content associated with the meeting. When a recording is started, a message notifies all meeting attendees that they are being recorded.

See your RSS administrator to confirm that your system allows the recording of meetings.

To record a meeting:

- » Click the record button .

To stop recording a meeting:

- » Do one of the following:
 - Click an active record button to stop recording.
 - Log out of the meeting, close the browser, or click the hang-up button  (see [End a Meeting](#)) if you are the presenter.

Retrieve a Recording of a Meeting

To obtain a copy of a recorded meeting, contact your RSS administrator.

Invite Participants While a Meeting is in Progress

You can invite users to a meeting by e-mail message or by social connector contact lists, if social contacts have been enabled in your CloudAXIS environment. Only PC users can send meeting invitations while meetings are in session.


**Note: Meeting invitations on Mac computers**

Mac computer users cannot send invitations to meetings that are already in session.

Invite Participants with an E-mail Message

Presenters using a PC can send e-mail invitations to participants while a meeting is in session.

To invite participants from the portal interface screen:

- 1 Click the contacts icon  to open a new e-mail message from your default e-mail service. The email automatically includes a web URL that recipients can click to join the meeting.
- 2 In the **To** field, enter the e-mail addresses of the participants you want to invite, and then send the e-mail.



Invite Participants from a Social Connector Contact List

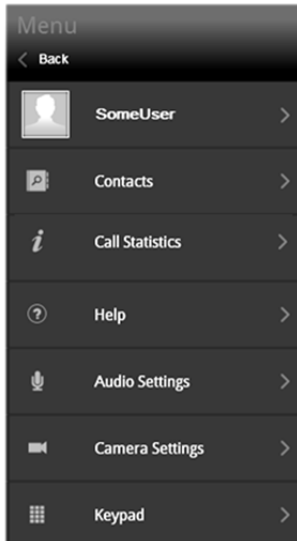
If your CloudAXIS administrator has enabled social contacts in the CloudAXIS environment, presenters can invite participants from their Google Talk and Facebook contact lists while a meeting is in session.

**Note: HTTP forward proxy and social contacts**

If your environment uses an HTTP proxy that requires authentication, you will be prompted to enter proxy credentials (username and password) when you attempt to access social contacts. See your administrator for more information.


To invite participants from a social connector contact list:

- 1 From the portal interface screen, click the menu button  to display the **Menu** bar, as shown.
(Note that a previous menu selection may appear in place of the regular menu. If you do not see the portal menu options, click the back button .)




- 2 Click **Contacts** to open the Contacts screen. Then add contacts from either Facebook or Google.


To add contacts from your Facebook account:

- 1 Click **Add Facebook Contacts**.
- 2 Sign in at the prompt with your Facebook credentials.
- 3 Click Log In (first-time access only).
- 4 Remove any unwanted preferences; keep Access Facebook Chat.
- 5 Click Allow; then click Show Contacts. Your available contacts appear in list.
- 6 Click the plus icon **+** next to each contact you want to invite.
- 7 Click the social contacts icon  next to the search bar to return to the social contacts options.

To add contacts from your Google Talk account:

- 1 Click Add Google Talk Contacts.
- 2 Sign in at the prompt with your Google Talk credentials.
- 3 Click Show Contacts to display a list of your available contacts.
- 4 Click the plus icon **+** for each contact you want to invite.
- 5 Click the social contacts icon  next to the search bar to return to the social contacts options.

Control the Display Screen

The portal displays a video stream of all attendees who enter the meeting with a functional camera on their computer or device. The video stream for attendees without cameras is replaced by a privacy placeholder, which is also shown when an attendee clicks the video icon  (see [Hide Your Video Stream](#)). Video also allows for the sharing of content among meeting participants.

A user's portal interface screen provides the following viewing control options:

- **View Self** Toggles your own video stream display in your interface screen.
- **View Main Video** Toggles the video stream display of all other meeting attendees in your interface screen.
- **View Content** Toggles the video stream display of shared content in your interface screen.
- **Full Screen** Toggles the display size of the video streams in your interface screen. This option increases the size of your interface screen, including any content being shared.

The CloudAXIS web client supports two styles of video layout: AVC and SVC. The capabilities and settings of the multipoint control unit (MCU) that is hosting the conference determine whether AVC or SVC layout is used for a given conference.

In the AVC layout, images of the other participants in the conference are rendered in a single video pane. In the SVC layout, the image of each participant is rendered in a separate video pane. In SVC mode, you can click on a person's image to zoom in on it and hide all the others and click the image again to restore the full layout.




Manage Privacy Settings

You can activate and deactivate the portal privacy settings to control audio and video privacy. These settings can be used together to enable both audio and video privacy or separately to enable audio-only or video-only privacy.

Hide Your Video Stream

You can turn on your video privacy settings to hide your video stream. After turning on video privacy, you can still view other participants who choose to be viewed, but they cannot view you. Use Hide when conducting meetings that are classified or include sensitive information that is best not shared over video.



To turn on your video privacy:

- 1 On the portal interface screen, click the video icon . The icon becomes inactive , indicating that your video stream is hidden from other meeting participants.
- 2 To restore your video stream, click . When your camera is reactivated, other meeting attendees can see your video stream in their portal interface screens.

Mute and Unmute Your Microphone

When your microphone is muted, you can still hear other participants, but they cannot hear you. Use muting to prevent annoying other participants with unnecessary noise or conversation taking place at your location.

To mute your microphone:

- 1 On the portal interface screen, click the microphone icon . The icon becomes inactive , indicating that your microphone is muted.

- 2 To unmute your microphone, click the muted-microphone icon .



Change Hardware Settings

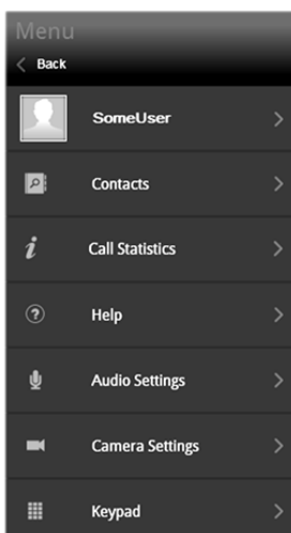
You can adjust settings to change the audio and video input and output of your computer for CloudAXIS meetings.

Change Your Camera

You can use an alternate camera that is attached to and recognized by your computer.

To change your camera:

- 1 On the portal interface screen, click the menu icon  to display the main **Menu**, shown next.
(Note that instead of the main Menu, a previous menu selection may appear. If you do not see the main Menu options, click the back button .)





- 2 Select **Camera Settings** from the **Main** menu to open the **Camera Devices** screen.
- 3 From the **Camera** drop-down menu, select a different camera to display your video stream.

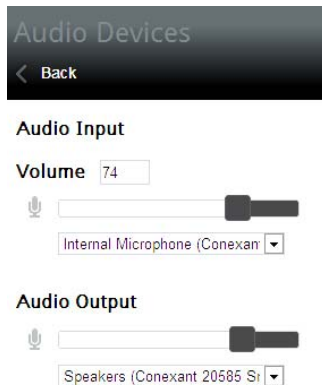
Adjust Your Microphone and Speakers

This section shows you how to adjust your microphone and speakers to improve the audio quality of a meeting for yourself and the other participants.

To adjust your microphone settings:

- 1 On the portal interface screen, click the menu icon  to display the main **Menu**.
(Note that instead of the main Menu, a previous menu selection may appear. If you do not see the main Menu options, click the back button .)

- 2 Select **Audio Settings** to open the **Audio Devices** screen, as shown next.




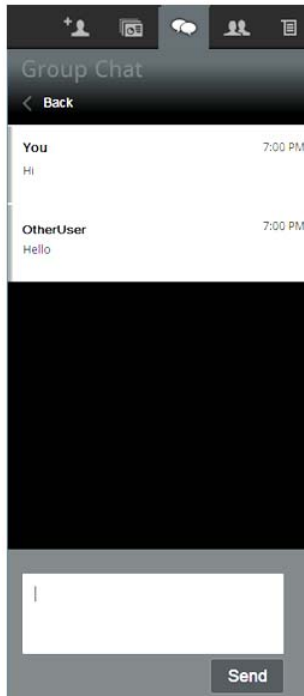
- 3 In the **Audio Devices** menu, change microphone options in the **Audio Input** section, and change the speaker options in the **Audio Output** section:
 - o **Audio Input** options:
 - » To select a different microphone, use the **Audio Input** drop-down menu.
 - » To change the volume, click the volume slider and move it to the right to increase the volume or the left to decrease the volume.
 - o **Audio Output** options:
 - » To select different speakers, select an option from the **Audio Output** drop-down menu. Click **Test** to test your newly selected speakers.
 - » To change the volume, click the volume slider and move it to the left to increase the volume or the right to decrease the volume.

Chat with Other Meeting Participants

Use group chat for text-based discussions with other participants during a meeting. All meeting attendees can view and participate in the chat while the meeting is in progress.

To open the group chat:



- 1 On the portal interface screen, click the chat icon .
- 2 In the **Group Chat** box, shown next, type a message in the text box at the bottom; then click **Send** to send your message.



Use the DTMF Keypad

A dual-tone multi-frequency (DTMF) keypad is available for entering DTMF commands.

To use the DTMF keypad:


- 1 On the portal interface screen, click the menu icon  to display your portal's **Main** menu.
(Note that a previous menu selection may appear. If you do not see the main Menu options, click the back button .)
- 2 On the Main menu, select **Keypad**.
- 3 The **DTMF keypad** appears, as shown next. You can now enter DTMF commands.



Leave a Meeting

Participants can leave a meeting at any time.

To leave a meeting:

- » Do one of the following:
 - Close your browser window.
 - Click **Sign Out**.
 - Click the hang-up button .

To learn how a presenter ends a meeting, see [End a Meeting](#).

Troubleshoot Issues

This section provides troubleshooting procedures that can assist you with solving such typical conferencing problems as video, audio, and loading-screen errors. If you are experiencing problems, begin by confirming the basic requirements listed in [Minimum Requirements](#). If all requirements are met, see the section in this chapter that best matches the issue you are experiencing.

This section contains troubleshooting information on the following issues:

- [Unable to Create Meetings](#)
- [Unable to Launch the Welcome Screen](#)
- [Unable to Add an Active Directory User](#)
- [Unable to Host or Join Meetings](#)
- [Unable to Send E-mail Notifications](#)
- [Receiving “Unable to Create a Conference with a Personal VMR” Message](#)
- [Receiving “External Server Not Set” Message](#)
- [Receiving a Blue Video Screen](#)
- [Login Fields Do Not Appear](#)
- [Experiencing Issues with Internet Explorer](#)
- [Receiving the Camera Silhouette Image](#)
- [Forgot and Change Password Requests](#)
- [Resolving Audio Issues](#)
- [Experiencing Echoes During the Meeting](#)
- [Experiencing Low Audio from a Participant](#)
- [Resolving Miscellaneous Audio Issues](#)
- [Unable to Share or View Content or Experiencing Poor Audio or Video Quality](#)

Unable to Create Meetings

If you are unable to create meetings, have your administrator confirm the settings outlined in the troubleshooting section of the *RealPresence CloudAXIS Suite Administrators' Guide*. This document is available on the Polycom support Site at www.support.polycom.com.

Unable to Launch the Welcome Screen

When you enter a meeting, the welcome screen shows video options (see [Select Video Preferences](#)). If you are unable to launch the welcome screen after creating a meeting, have your administrator confirm the settings outlined in the troubleshooting section of the *RealPresence CloudAXIS Suite Administrators' Guide*.

Unable to Add an Active Directory User

If you are unable to add an Active Directory user, have your administrator confirm the settings outlined in the troubleshooting section of the *RealPresence CloudAXIS Suite Administrators' Guide*.

Unable to Host or Join Meetings

If you are seeing the error message “Video resources are not available” when you try to host or join a meeting, contact your administrator.

Unable to Send E-mail Notifications

If you are unable to send e-mail notifications, have your administrator confirm the settings outlined in the troubleshooting section of the *RealPresence CloudAXIS Suite Administrators' Guide*.

Receive “Unable to Create a Conference with a Personal VMR” Message

If you receive the “Unable to Create a Conference with a Personal VMR” message, have your administrator confirm the settings outlined in the troubleshooting section of the *RealPresence CloudAXIS Suite Administrators' Guide*.

Receive “External Server Not Set” Message

If you receive the “External Server Not Set” message after clicking **Meet Now**, have your administrator confirm the settings outlined in the troubleshooting section of the *RealPresence CloudAXIS Suite Administrators' Guide*.

Receive a Blue Video Screen

If a blue video screen appears in place of your video stream, your camera is being used by another application. To correct this problem, close the other application that is using the camera, and then reenter the meeting.

Login Fields Do Not Appear

If the Username and Password fields do not appear in the Welcome to CloudAXIS screen, be sure JavaScript is running on your computer. See <http://enable-javascript.com/> for further details.

Experiencing Issues with Internet Explorer

If scheduled meetings are not displayed in the Calendar, newly created contacts are not displayed in the Address Book, or a newly created user is not displayed in User Management when the portal is displayed in Internet Explorer, tap **F12**, select **Cache**, and then select **Always Refresh from Server**.

Receiving the Camera Silhouette Image

This silhouette indicates that another application is using the camera. Close the application using the camera and try again.

Forgot Password and Change Password Requests

Contact your administrator if you have forgotten your password or want to change it.

Resolving Audio Issues

This message identifies audio issues that may occur when participating in a meeting using the portal.

Experiencing Echoes While a Meeting is in Progress

This issue is typically caused by a high volume setting. Try setting the speaker volume to 50 percent for all participants in the conference.

Experiencing Low Audio from a Participant

You may experience low audio when the participant with low volume first joins the meeting. It is usually caused by the participant's low microphone volume. The participant should increase the microphone gain/boost level. Follow these steps to increase the levels.

To increase the microphone gain/boost level:

- 1 Click **Start**.
- 2 Select **Control Panel**.
- 3 Click **Hardware and Sound**.
- 4 Click **Sound**.
- 5 Click the **Recording** tab.
- 6 Double-click the selected microphone.
- 7 Click the **Levels** tab.
- 8 Increase the **Microphone Boost**.
- 9 Increase the **Microphone Level**.
- 10 Click **OK** until all screens are closed.

Resolving Miscellaneous Audio Issues

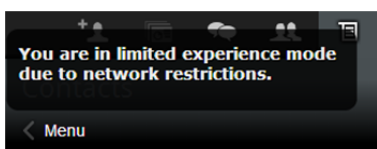
Starting with Windows Vista, Microsoft introduced a process called `audiodg.exe` to perform audio enhancements. Depending on the enabled enhancements, `audiodg.exe` can use a significant amount of CPU and cause a drop in quality. Polycom includes all of the required enhancements in the audio library; disabling the `audiodg.exe` process and using these enhancements may resolve an audio issue.

To disable Windows audio enhancements in Windows 7:

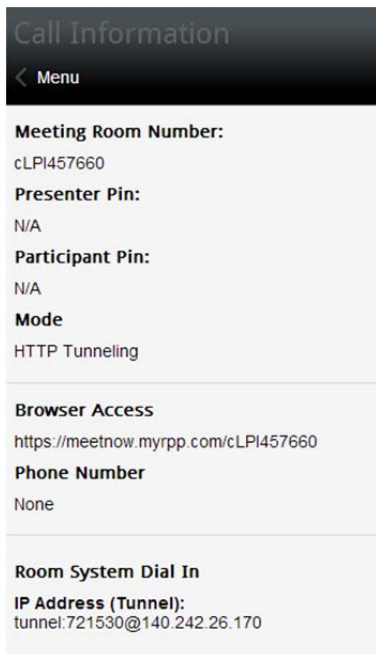
- 1 Right-click the speaker icon in the notification area of the taskbar.
- 2 In the **Playback** tab, select **Playback Devices** from the pop-up menu. A list of devices should appear on the screen.
- 3 Double-click the device with a green checkmark. The properties window will open.
- 4 Click the **Enhancements** tab at the top.
- 5 Check the **Disable all enhancements** check box.
- 6 Click **OK** to save your changes and close the window.
- 7 Click **OK** to close the **Playback Devices** window.

Unable to Share or View Content or Experiencing Poor Audio or Video Quality

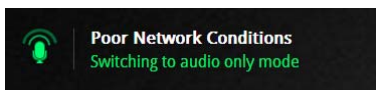
In a restrictive firewall environment, the user might be able to join video conferences only in Limited Experience Mode. Joining in Limited Experience Mode prevents the user from sharing and receiving content to and from other participants in the call. If your call joins in Limited Experience Mode, the following notice appears on screen.



When connecting to a meeting in Limited Experience Mode, you also see the following call information on the Meeting page, where the Mode is displayed as HTTPS Tunneling.



Participating in a meeting in Limited Experience mode can also affect the quality of the meeting experience; video quality could be affected with high latency and low bitrate when connecting in slow network conditions. If poor network conditions persist, the user may be dropped to audio-only mode. If the user drops to audio-only mode, the **View Self**, **Main Video**, and **Content** options will be disabled on the portal interface and the following notice will appear on screen:



The user should try allowing UDP egress/ingress traffic to the SIP host in the firewall settings to decrease the chances of joining in Limited Experience Mode.

Get Help

Related Documents

For more information about installing, configuring, and administering Polycom products, refer to Documents and Downloads at [Polycom Support](#).

The Polycom Community

The [Polycom Community](#) gives you access to the latest developer and support information. Participate in discussion forums to share ideas and solve problems with your colleagues. To register with the Polycom Community, simply create a Polycom online account. When logged in, you can access Polycom support personnel and participate in developer and support forums to find the latest information on hardware, software, and development topics.

Learn, Share, Connect
The Polycom Community

Community Home Register · Sign In · Help · Contact Us

Community Homepage

Hello and Welcome to the Polycom Community!
We've created this community site so you can connect and interact with your colleagues and industry experts to exchange ideas, post questions, answers and share information. Come join the discussions! Happy Posting!

Support Community

- Voice
- PSTN
- VoIP
- SpectraLink
- DECT

Audio / Video

- Video Endpoints
- Telepresence
- Integrated Audio
- RealPresence Mobile

Developer Community

Click on one of the Forum links below to sign in or register and accept our SDK Agreement.

- Polycom Infrastructure Forum
- Polycom End Points Forum

Top Kudoed Posts

Re: Updated 4000 - now can't access?	2
Re: Updated 4000 - now can't access?	2
Re: Telepresence M100 not working	2
[FAQ] VoIP frequently asked questions	2
Re: Browser Environment error for RMX	1

[View All](#)