

# Quick Tips for Polycom® RealPresence® CloudAXIS® Suite

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## Access the Web Portal

You can log into the Web Portal to create, schedule, join, and manage your meetings.

### To access the Web Portal:

- 1 Obtain the URL and login credentials from your administrator.
- 2 Open a web browser, and enter the URL into the address bar.
- 3 If prompted, enter your login credentials.
- 4 Click **LOGIN**.

The Web Portal home page is displayed.

## Start a Meeting Now

You can start a meeting immediately and send meeting invitations to contacts.

### To start a meeting immediately:

- 1 Click **Meet Now**.
- 2 Complete the required and optional fields.
- 3 Select any of the **Meeting options** and enter the required values.
- 4 Click **Start**.

## Schedule a Meeting

You can schedule meetings and send meeting invitations to contacts.

### To schedule a meeting:

- 1 Click **Schedule Meeting**.
- 2 Enter the required and optional meeting information.

3 Select any of the **Meeting options** and enter the required values.

4 Click **Schedule**.

## Join Meetings

You can join meetings using the URL link in a meeting invitation, from the Meeting Portal, or from the Web Portal.

### To join a meeting from the Web Portal:

- 1 In the Web Portal, click **Join Meeting**.
- 2 On the **Join Meeting** screen, enter the **VMR** and **Passcode** (if applicable) provided in the meeting invitation, and click **Start**.

### To join a scheduled meeting from the Web Portal:

- 1 In the Web Portal, locate the meeting on the home page or from the **Calendar**, and click the meeting.
- 2 Click the **Web URL** or click **JOIN**.


### To join a meeting from a web URL:

- 1 Click the web URL in the meeting invite.
- 2 On the login page, enter your network username and password, and click **JOIN THE MEETING**.
- 3 If you're accessing the meeting on a tablet or mobile device, click **Launch Real Presence Mobile** if you have the RealPresence Mobile application installed.

## Set Audio and Video Preferences

When you access the Meeting Portal, you can choose audio and video options before you enter a meeting.

To select audio and video preferences before joining a meeting:

- 1 When you join a meeting, click .
- 2 On the **Audio/Video Settings** screen, choose your **Microphone**, **Speaker**, and **Camera** settings.
- 3 Move the slider for **Call Quality** to the left or right. The default is set to High.

## Disable Audio, Video, and Content

You can choose to disable audio, video, and content before you join a meeting. When you disable these components, you only have access to the Roster and Chat features.

To disable audio, video, and content before joining a meeting:

- » Click to uncheck the **Audio, Video & Content** checkbox.

## Adjust Audio and Video

You can adjust audio and video settings during meetings you are currently attending.

- 1 During a meeting, click **Settings**.
- 2 Click the drop-down menus to select a **Microphone**, **Speaker**, or **Camera**.

## Control Audio and Video

During meetings, you can mute your microphone, speakers, and video individually from the Meeting screen.

### To mute or unmute your video:

- » Click  or .

### To mute or unmute audio:

- » Click  or .


### To mute or unmute your speakers:

- » Click  or .


## Mute Meeting Attendees

Chairpersons can mute all meeting attendees or individual attendees.

### To mute all meeting attendees:


- » Click **Roster**, click , and confirm you want to mute all attendees.

### To mute individual attendees:

- » Click **Roster**, click an attendee, and click .

## Drop Attendees


Chairpersons can choose to remove attendees from a meeting.

- » Click **Roster**, click an attendee, and click .

## Promote or Demote Attendees

Chairpersons can either promote participants to chairpersons and guests to participants or chairperson, or demote chairpersons to participants or guests and participants to guests.

### To promote or demote meeting attendees:

- 1 Click **Roster** and click an attendee.
- 2 Click  and click either **Chairperson**, **Participant**, or **Guest**.

## Chat with Meeting Attendees

You can send chat messages to other attendees during a meeting, and all meeting attendees can view and participate in the chat while the meeting is in progress.

### To send group chat messages:

- 1 On the Meeting Portal, click **Chat**.
- 2 In the chat field, type a message.
- 3 Press **Shift + Enter** on your keyboard to move to the next line within the message.
- 4 Press **Enter** to send the message.

## Share Content

Chairpersons and participants can share desktop content during a meeting. Guest cannot share content.

### To share content during a meeting:

- » Click **Content**, select the desktop monitor you want to share, and click **Share**.

The Content Sharing toolbar displays, as shown next.



## Request Presentation Rights

If you do not have permission to share content, you need to request presentation rights.

### To request presentation rights:

- » Click the **Roster** and click **To share content, click to ask for Presentation Rights**.

## Control Layout of Content

Meeting attendees receiving content can control the layout of the content and people in the meeting.

### To control the layout of content and people in the meeting:

- 1 During a meeting with shared content, click **Layouts**.
- 2 Choose one of the layouts.


## Record a Meeting

Only chairpersons can record a meeting.

### To record a meeting:

- » Click .


### To stop recording a meeting:

- » Click  to stop recording.

## End Meetings

Only a chairperson can end a meeting for all. Participants and guests can leave a meeting.

### To end a meeting:

- » Click  and select one of the available options:
  - Return to the meeting.
  - Exit the meeting.
  - End the meeting for all.

## Invite Contacts during a Meeting

You can invite contacts to a meeting in progress by email or instant messaging.

### To invite participants to a live meeting:

- 1 Click **Add** to open the meeting details pane.
- 2 Click **COPY TO CLIPBOARD**.
- 3 Send the meeting details to a contact.