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Polycom® RealPresence® Desktop
Modes of Operation

RealPresence Desktop has three modes of operation:

- In standalone mode, RealPresence Desktop 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.

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

- In managed mode, RealPresence Desktop registers with a Polycom provisioning server like a RealPresence Resource Manager system. The Polycom provisioning server configures RealPresence Desktop automatically. It also provides access to a centralized directory server. In managed mode, the Polycom provisioning server manages licensing of RealPresence Desktop, so you do not need to purchase an individual license.

- In Cloud service mode, a Service Provider system configures RealPresence Desktop 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

Topics:

▪ Get Started with RealPresence Desktop 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 application, you have the following options based on the mode of operation:

▪ Select Individual when using RealPresence Desktop in standalone mode.
▪ Select Enterprise when using RealPresence Desktop in managed mode.
▪ Select Cloud when you are in a Cloud service environment.

Get Started with RealPresence Desktop in Standalone Mode

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

Procedure

1. Start RealPresence Desktop and select Individual on the Login page. then select Enter.
2. Do one of the following:
   ▪ Select Trial to use the RealPresence Desktop 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 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. LDAP search feature is only supported under the managed mode.

Procedure

1. Start RealPresence Desktop 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.
   If you select the Sign in using network login credentials check box, RealPresence Desktop will use your Windows login credentials to sign in.

4. Select Sign In. RealPresence Desktop 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, the later RealPresence Desktop 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.
<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Number</td>
<td>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.</td>
</tr>
<tr>
<td>Provisioning</td>
<td>Provisioning server address.</td>
</tr>
<tr>
<td>H.323</td>
<td>H.323 gatekeeper.</td>
</tr>
<tr>
<td>SIP</td>
<td>SIP configuration information.</td>
</tr>
<tr>
<td>Network</td>
<td>IP address the far end can use to call you.</td>
</tr>
<tr>
<td>XMPP</td>
<td>IP address of the Extensible Messaging and Presence Protocol (XMPP) server.</td>
</tr>
</tbody>
</table>
Startup Options

Topics:

- Remember My Startup Choice
- Set Your Startup Preference

By default, the RealPresence Desktop 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 remember your startup option. You can also change the settings later.

**Remember My Startup Choice**

The first time you start up the RealPresence Desktop, you can let the application 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 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 **Set Your Startup Preference**.
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 Automatically When Your System Powers up
▪ Answer Incoming Calls Automatically
▪ Open Links Using RealPresence Desktop
▪ Configure Call Rate
▪ Configure Call QoS
▪ Configure H.323 Settings (Standalone Mode Only)
▪ Configure SIP Settings (Standalone Mode Only)
▪ Configure Audio Devices
▪ Enhancing My Audio Experience
▪ Enable Polycom Acoustic Fence for USB Headsets
▪ Enable Polycom NoiseBlock
▪ Enable Mute Reminder
▪ Configure Camera
▪ Configuring Network Settings
▪ Set Closed Captioning
▪ Enable Automatic Face Brightness Adjustment
▪ Set My Default Call Type
▪ Display Test Features

RealPresence Desktop application setting options vary depending on your mode of operation. In standalone mode, you need to configure RealPresence Desktop manually. In managed mode and cloud service mode, a provisioning server configures most of the RealPresence Desktop 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 ![Select](select_icon.png).

2. Select **Profile**.

3. Select ![Select](select_icon.png) and browse to select a picture.

4. When the photo appears in the preview window, drag to position it, or select ![Zoom In](zoom_in_icon.png) to zoom in or ![Zoom Out](zoom_out_icon.png) 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 ![Select](select_icon.png).

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 Automatically When Your System Powers up
You can choose to start RealPresence Desktop 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 General > 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 20

Open Links Using RealPresence Desktop
You can set RealPresence Desktop as the default program to open Callto, H.323, or SIP links.

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

Note: Ensure the links are not used by other applications such as Microsoft Lync. Otherwise, restart RealPresence Desktop 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 is 256 kbps. RealPresence Desktop 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 37

Configure Call QoS

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

On Windows systems, the QoS system level value has a higher priority than the QoS setting in RealPresence Desktop. For example, if you set the QoS value using Windows Group Policy for RealPresence Desktop, RealPresence Desktop will use this value by default and ignore the QoS settings in RealPresence Desktop.

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

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.
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. If you have only one audio input or output device, they are used by default.

Procedure

1. Select ⌁.
2. Select Audio Device.
3. Select a microphone from the Audio input device (microphone) drop-down list.
4. Select a speaker from the Audio output device (speakers) drop-down list.
5. Select OK to save your settings.

Related Links
Prevent RealPresence Desktop to Take Exclusive Control of the Microphone on page 38
Select Audio and Video Preferences During a Meeting on page 23
Configure Camera on page 15

Enhancing My Audio Experience

Your system audio enhancement features may interfere with Polycom Acoustic Echo Cancellation technology which is adopted by RealPresence Desktop. We recommend you to turn off these system audio enhancement features to have a better audio experience.

You can do the following:

- Disable all enhancements. To do this, go to Windows Control Panel > Sound > Speaker > Enhancements tab.
- Remove Conexant smart audio processing by uninstalling Conexant Smart Audio. To do this, go to Windows Control Panel > Programs and Features and uninstall the application.

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 Audio 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 35
Using Polycom SmartPairing on page 31

Enable Mute Reminder

When Mute Reminder is enabled, if you speak with your microphone muted, a “You are muted” dialog opens to remind you to unmute your microphone. This feature works only when you use the in-call tool bar to mute. The feature does not work when you use your PC’s microphone controls to mute.

Procedure

1. Select.
2. Select Audio Device > Mute Reminder.
3. Select OK to save your settings.

Related Links
Adjust Your Speaker Volume on page 22

Configure Camera

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

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 23

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 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 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.

Set Closed Captioning
You can enable closed captioning to display text transcriptions of audio during meetings that include Polycom® RealPresence® Group Series systems. The text displays for a while and then disappears automatically.

Note: This feature is available only in H.323 and SIP AVC calls and in Latin languages that are supported in the user interface.

Note: This feature is not available when the RealPresence Desktop is sharing content.

Procedure
1. Select General > Advanced, select or disable Enable Closed Caption, then select OK.

Enable Automatic Face Brightness Adjustment
Adjust your video brightness automatically to ensure proper face brightness.

Procedure
1. 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 General > 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 General > Display Test Features.
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
▪ Call Icons
▪ View Recent Calls
▪ Change the Video Layout

Using RealPresence Desktop, 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
Call Management

- 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 **E**.
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 **E**.
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 **General > Auto-answer incoming calls** is enabled, you are prompted when there are incoming calls. You can answer or reject the call.
Reject an Incoming Call

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

Procedure « Select Decline.

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 application.

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 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/unmute 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 🔴

Related Links
Enable Mute Reminder on page 15
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:
   ▪ Audio input device (microphone)
   ▪ Audio output device (speakers)
   ▪ Audio 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.
Call Icons
The following table explains call icons.

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>📞</td>
<td>Incoming calls</td>
</tr>
<tr>
<td>📞</td>
<td>Outgoing calls</td>
</tr>
<tr>
<td>📞</td>
<td>Missed calls</td>
</tr>
<tr>
<td>📞</td>
<td>Number of audio-only participants.</td>
</tr>
<tr>
<td>📞</td>
<td>Number of video enabled participants.</td>
</tr>
</tbody>
</table>

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 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.
   - 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.
   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 Add to Favorites List.
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 **.</i>**
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 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 application and import it into another RealPresence Desktop application.

**Procedure**

1. Log into RealPresence Desktop.
2. Click or tap **</i> 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 application and import the profile file into your RealPresence Desktop.
Procedure

1. Log into RealPresence Desktop.
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 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.
   You can refresh the running application list by clicking or tapping 🔄 on the right of Share Application.

Related Links
Configure Call Rate on page 12
I Cannot Find the Content Button on page 37
Share Your Monitor or Application with the Paired System on page 31

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 35

**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:** 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 38

### 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

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**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 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 form the paired device.
   You can also enter a DTMF passcode using your keyboard without showing the DTMF keypad during a call.
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 ![Contact Icon](image)
3. Select ![Contact Icon](image) 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 ![Contact Icon](image) from the in-call toolbar.
2. Select ![Contact Icon](image) to select or search for a contact and type your message.
3. Select **Send Message** or press **ENTER** to send your message.
With Polycom® MusicMode™ technology, RealPresence Desktop 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.

Procedure

1. Go to Audio Device > Audio input 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 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 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 the sampling rate of the PC microphones is higher than 44.1 kHz and clear the Enable audio enhancements check box under the Advanced tab of Internal Microphone Properties.
  ◦ If you use Smart Audio, ensure that you disable Smart Audio.

▪ When there are several HDX or RealPresence Group Series systems nearby that are all configured to support ultrasound-based auto detection, your RealPresence Desktop 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 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 to Take Exclusive Control of the Microphone

When you start RealPresence Desktop, the microphone is used only by RealPresence Desktop; 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 fails with H.323 registration, you will see an alert on the bottom right of the GUI. The following operation may cause H.323 registration failure.

- When you sign into different RealPresence Desktop 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 instance.
- When the XMPP service stops working, you need to use different user IDs to sign in different RealPresence Desktop instances. If you use the same user ID to sign into more than one RealPresence Desktop, 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