Trademark Information
POLYCOM® and the names and marks associated with Polycom's products are trademarks and/or service marks of Polycom, Inc., and are registered and/or common law marks in the United States and various other countries. All other trademarks are the property of their respective owners.

Patent Information
The accompanying product may be protected by one or more U.S. and foreign patents and/or pending patent applications held by Polycom, Inc.
Contents

RealPresence Desktop Modes of Operation .................................................. 4
Configure RealPresence Desktop ............................................................. 4
  Use Automatic Setup to Configure RealPresence Desktop ....................... 5
  Set up RealPresence Desktop Manually ................................................ 6
Manage Calls ............................................................................................. 9
  Use the In-call ToolBar ......................................................................... 9
  View Recent Calls ................................................................................ 10
  Change the Video Layout ..................................................................... 11
Manage Contacts ....................................................................................... 11
Share Content .......................................................................................... 12
  Maximize and Restore Your View ........................................................ 13
Enable and Use SmartPairing ................................................................... 13
Use Instant Messaging and Presence ...................................................... 15
  Use Chat to Send an Instant Message .................................................. 15
  Set Presence-Related Parameters on RealPresence Resource Manager ... 16
Track Problems ......................................................................................... 16
  View Log Files to Track Problems ....................................................... 16
  No device can be connected when using SmartPairing ....................... 17
RealPresence Desktop Modes of Operation

You can use RealPresence Desktop in standalone mode or managed mode.

- **Standalone mode** provides direct access to the configuration and settings of RealPresence Desktop. It does not require registration to a Polycom provisioning server (such as Polycom Converged Management Application™ (CMA®) 4000/5000 or Polycom RealPresence Resource Manager). It supports registration and calling with a H.323 gatekeeper and/or a SIP server. You must purchase a license and enter licensing information manually to use this application beyond the 30-day trial period.

- **Managed mode** provides the benefits of centralized management including centralized management of configuration, automatic distribution of runtime licenses, and access to a centralized directory server. In managed mode, you must register to a Polycom provisioning server (a Polycom Converged Management Application (CMA) 4000/5000 or Polycom RealPresence Resource Manager). The Polycom provisioning server configures RealPresence Desktop automatically. You do not need to purchase a RealPresence Desktop license when you are using the product in managed mode (licensing is controlled from the Polycom provisioning server).

Configure RealPresence Desktop

The following figures show the RealPresence Desktop main window and in-call toolbar. See Use the In-call ToolBar for details.

**Figure: RealPresence Desktop for Windows main window**
Use Automatic Setup to Configure RealPresence Desktop

In managed mode, you can configure the options listed in the following procedure. To configure RealPresence Desktop (optional): The Polycom provisioning server configures other RealPresence Desktop options automatically. You need to use your company account to log into RealPresence Desktop.

To enable RealPresence Desktop to discover the provisioning server:

1. Select the Enterprise Sign-In page and click Enter.
2. Enter your e-mail address (usually your corporate e-mail address) on the Sign In page, and then click Next.
3. Enter your User Name and Password.
   If you select the Sign in using network login credentials check box, RealPresence Desktop will use your Window login credentials to sign in.
   If a server name does not appear in the Server field, the application cannot find a provisioning server. Contact your IT administrator for the information to enter in the Server field.
4. Click Sign In. RealPresence Desktop will discover the provisioning server automatically.

To configure RealPresence Desktop (optional):

1. Click Settings after you sign in.
2. Click General and configure the following settings:
   - Display Name: In the managed mode, displays your login name to the far end no matter what your display name is.
   - Automatically start when the system starts: Specifies whether to start RealPresence Desktop automatically when you start your computer.
   - Auto-answer incoming calls: Specifies whether to answer incoming calls automatically.
   - Audio mute auto-answered calls: Allows the system to answer calls without turning on the microphone.
   - Video mute auto-answered calls: Allows the system to answer calls without turning on the camera.
Set RealPresence Desktop as the default program for the following links:
- Callto
- H.323
- SIP

It specifies whether the RealPresence Desktop system should open automatically when you click these link types.

3 Click **Call Rate** and select your preferred call speed (up to 1920 kbps). Following are the recommended call rates:
- For household users, select 384 kbps.
- For enterprise networks, choose 512 kbps.

The call rate impacts both incoming and outgoing calls. It 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.

<table>
<thead>
<tr>
<th>Minimum call rate limitation</th>
</tr>
</thead>
<tbody>
<tr>
<td>The lowest selectable call rate for RealPresence Desktop is 256 kbps. 128 kbps is not selectable from RealPresence Desktop. RealPresence Desktop can participate in 128 kbps calls, but only if the far end or the gatekeeper impose this rate.</td>
</tr>
</tbody>
</table>

4 To specify your audio devices, select **Audio Device** from the menu, and then configure the following options:
- **Audio input device (microphone)** Select a microphone that you use during a call.
- **Audio output device (speakers)** Select a speaker that you use during a call.
- **Enable Keyboard Noise Suppression** Select this check box to mask the keyboard and mouse noise.

5 To adjust your camera and video devices settings, select **Camera** from the menu, and then configure the options displayed.

6 Click **SmartPairing** to enable or disable SmartPairing.
- **Enable SmartPairing** Select this check box to enable SmartPairing.
- **Auto Detection** If **Auto Detection** is turned on, IP addresses of nearby Polycom HDX or RealPresence Group Series system that have been detected will be listed.

7 Click **Test Features** to configure the USB Headset Noise Suppression feature.

<table>
<thead>
<tr>
<th>Enable USB Headset Noise Suppression</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select this check box to mask the background noise. The password is 456.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Limitation on this feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>This feature only works when you are using a USB headset and RealPresence Desktop can detect the second microphone.</td>
</tr>
</tbody>
</table>

8 Click **OK** to save the settings.

**Set up RealPresence Desktop Manually**

In standalone mode, you need to import a license to activate RealPresence Desktop and configure the application manually. When you purchase RealPresence Desktop from an authorized reseller of Polycom, you will receive either a physical or electronic document. On the document, you will see a license number.
and directions for authorizing the license through Polycom Support web page. Following the authorization process, you will be authorized to use RealPresence Desktop for as long as the service and support are in effect. RealPresence Desktop will operate identically to the way it would as it is provisioned with a CMA or RealPresence Resource Manager. However, in standalone mode, RealPresence Desktop does not provide encryption, provisioning, monitoring, or Active Directory Services. You may need to contact your IT administrator for the information to enter during the setup procedure.

To configure RealPresence Desktop manually:

1. After you launch RealPresence Desktop, click **Enter** to enter as **Individual Account**.
2. Choose one of the following:
   - Click **Trial** to use the RealPresence Desktop application as a trial.
   - Click **Activate** to activate the application. Then import your license, or enter your license and activation key.
3. **Click** **Settings**.
4. Click **General** and configure the following settings:
   - **Display Name** Enter the name to display to the far end during a call.
   - **Automatically start when the system starts** Start RealPresence Desktop automatically when you start your computer.
   - **Auto-answer incoming calls** Answer incoming calls automatically.
   - **Audio mute auto-answered calls** Answer calls without turning on the microphone.
   - **Video mute auto-answered calls** Answer calls without turning on the camera.
   - Set RealPresence Desktop as the default program for the following links:
     - Callto
     - H.323
     - SIP
   It specifies whether the RealPresence Desktop system should open automatically when you click these link types.
5. **Click** **Call Rate** and select your preferred call speed (up to 1920 kbps).
   - For household users, select **384 kbps**.
   - For enterprise networks, choose **512 kbps**.
   The call rate impacts both incoming and outgoing calls. It 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.
6. If desired, enable H.323. Click **H.323** to configure the following options.
   - **Enable H.323 Calls** Enable or disables H.323 calls.
   - **Gatekeeper Registration** Enable or disable registering your system with a gatekeeper.
   - **Gatekeeper Address** Enter the IP address or FQDN of the gatekeeper.
   - **H.323 Alias** Enter the name to display to the far site during calls.
   - **H.323 Extension** Enter the name that gatekeepers use to identify this system. Your organization’s dialing plan may define the names you can use for enterprise net.
7. If desired, enable SIP. Click **SIP** to configure the following options:
- **Enable SIP Calls** Display the configuration settings for SIP calls.
- **SIP Registration** Enable or disable registering your system with a SIP server.
- **SIP Proxy Server** Enter the IP address or FQDN of the SIP proxy server.
- **SIP Domain** Enter the domain name for authentication with a SIP registrar server:
  - If you use a Polycom DMA server as the SIP server, leave this field empty.
  - If you use a third-party SIP server, enter the domain name for authentication with the registrar server.
- **SIP User Name** Enter the user name for authentication with a registrar server.
- **Authorization Name** Enter the name to use for authorization when registering with a SIP registrar server.
- **SIP Password** Enter the password for authentication with a registrar server.
- **Transport Protocol** Choose the protocol that the system uses for SIP signaling:
  - TCP  Reliable transport
  - UDP  Best-effort transport
  - TLS  Encrypted transport

8 To specify your audio devices, select **Audio Device** from the menu, and then configure the following options:
- **Audio input device (microphone)** Select a microphone that you use during a call.
- **Audio output device (speakers)** Select a speaker that you use during a call.
- **Enable Keyboard Noise Suppression** Select this check box to mask the keyboard and other non-speech noise when you are not talking.

9 To adjust your camera and video devices settings, select **Camera** from the menu, and then configure the options displayed.

10 Click **Network** to configure NAT.
- **Media Ports** Specify the media transmission range to allocate to UDP ports. You can specify only the starting port. The valid value is from 0 to 65515. The end ports are populated automatically. Click the **Reset** button to set the ports to the default values, which are 3230 and 3250.
- **H.323 TCP Ports** Specify the H.245 signal traffic range to allocate to TCP ports. You can specify only the starting port. The valid value is from 0 to 65515. The end ports are populated automatically. Click the **Reset** button to set the ports to the default values, which are 3230 and 3250.
- **Use NAT** After you enable the NAT option, you must specify a public NAT address. Do one of the following to specify a public NAT address:
  - **Auto detect public (WAN) address** Select this check box to enable RealPresence Desktop detect a public address automatically.
  - **Manually input public (WAN) address** If you choose this option, you must type a public address in this field.

11 Click **SmartPairing** to enable or disable SmartPairing.
- **Enable SmartPairing** Select this check box to enable SmartPairing.
- **Auto Detection** If **Auto Detection** is turned on, IP addresses of nearby Polycom HDX or RealPresence Group Series system that have been detected will be listed.
12 Click OK to save the settings.

Manage Calls
You can simply use the RealPresence Desktop application to make, answer, reject, or end calls.

To place a call by entering a number:

1. Choose one of the following:
   - On the dialpad, click the numbers to enter the contact number to call.
   - Using your keyboard, enter the number.
   You can use any of the following formats:
   - 2555: SIP user name, E.164 extension for H.323
   - stereo.polycom.com: FQDN name
   - user@domain.com: SIP_username@domain.com
   - 10.11.12.13##1234:signaling IP##conference ID for H.323
   - 1234@10.11.12.13: SIP user name@IP address
   - 10.11.12.13: IP address
2. Click Call to start the call.

To place a call from the corporate directory:

1. Click .
2. Enter the name or part of the name that you want to call, and then press Enter.
3. Double-click the contact name from the search list.
4. Click Call besides the applicable device name of the contact to start the call.

To answer a Call
   » Click Answer.

Use the In-call ToolBar
During a call, you will see the in-call toolbar on the bottom of the screen. See Figure: RealPresence Desktop for Windows in-call toolbar on page 5 for the in-call toolbar example picture. Use the in-call toolbar to access
additional features of the RealPresence Desktop application, for example, to switch cameras or mute your audio.

Table: In-call Toolbar

<table>
<thead>
<tr>
<th>Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🌐</td>
<td>Network connection status.</td>
</tr>
<tr>
<td>📹</td>
<td>Hide or display local self-view.</td>
</tr>
<tr>
<td>�建</td>
<td>Encryption status.</td>
</tr>
<tr>
<td>🎥</td>
<td>Mute or unmute your video.</td>
</tr>
<tr>
<td>🎧</td>
<td>Mute or unmute your microphone.</td>
</tr>
<tr>
<td>🎯</td>
<td>Mute or unmute your speaker.</td>
</tr>
<tr>
<td>🔊</td>
<td>Adjust the volume.</td>
</tr>
<tr>
<td>⌨️</td>
<td>Share content.</td>
</tr>
<tr>
<td>📜</td>
<td>Enter a number or password.</td>
</tr>
<tr>
<td>📸</td>
<td>Control the far-end camera.</td>
</tr>
<tr>
<td>🛠️</td>
<td>Change call settings.</td>
</tr>
<tr>
<td>🎥</td>
<td>Maximize or restore the screen.</td>
</tr>
<tr>
<td>🗑️</td>
<td>Hang up from a call.</td>
</tr>
<tr>
<td>📮</td>
<td>Click the Chat tab to start a Chat session with another person.</td>
</tr>
</tbody>
</table>

To change device settings during a call:

» During a call, click 🎧 to switch your audio and video devices.

View Recent Calls

The RealPresence Desktop application stores details about the most recent calls placed and received.
To view information about recent calls:

1. Click 📆.
2. Click the call that you want to review.

Change the Video Layout

You can change the video layout in a call hosted by the Polycom RMX® system.

To change the video layout:

1. Connect to the Polycom RMX virtual meeting room.
2. Click 📈.
3. To display the layout options, click the asterisk (*) two times.
4. Select the number that corresponds to the layout that you want to use.
5. To return to the call, click 📈.

Manage Contacts

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.

To add a new contact manually to your local address book:

1. Click 📍, and then click 📐.
2. Enter the contact's Last Name and/or First Name.
3. (Optional) Enter identifying information about the contact:
   - Last Name
   - First Name
   - Title
   - Department
   - Location
   - Phone
   - E-mail
4. Click Add a device.
5. Enter the Device Name and Device Type.
6. Complete at least one of the following fields:
   - IP Address  IP address of the contact’s endpoint.
Online Help

- **H.323 Extension**  Number that gatekeepers use to identify this system. Your organization's dialing plan may define the numbers you can use.
- **H.323 Name**  Name that gatekeepers use to identify this system. Your organization's dialing plan may define the names you can use.
- **SIP URI**  SIP URI of the system.

7  Click **Save**.

**To add a contact from a corporate directory to your local address book:**

1  Click 
2  Enter the contact name or part of that name, and then press **Enter**.
3  From the search results, select the contact name.
4  Click **Add to Contacts**.

**To search for a contact:**

1  Click 
2  Enter the contact name or part of the name that you want to call, and then press **Enter**.
3  Click the contact name.
4  Click **Call** next to the applicable device name of the contact to start the call.

**To delete a contact:**

1  Click 
2  Select the contact that you want to delete.
3  Click **Delete**.

**Share Content**

You can share content during a call or share content on a paired Polycom HDX or RealPresence Group Series system. See **Enable and Use SmartPairing** on page 13 for details on sharing content on a paired device.

**To share content during a call:**

1  Click 
2  Choose one of the following
   - To share your desktop, select an option under **Share Monitor**.
   - To share a running application, select an option under **Share Application**.

**To stop sharing content from Monitor 1 or an application:**

»  Click **Stop**.
Maximize and Restore Your View

To toggle between maximizing and restoring the video and content windows:

» Double-click within the window area.

Enable and Use SmartPairing

You can pair your device with a Polycom HDX or RealPresence Group Series system and then do one of the following:

- **Share your monitor or application with the paired system**  You can share your monitor or application with paired Polycom HDX or RealPresence Group Series system.
- **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.

Before using this feature, you first need to enable SmartPairing on your RealPresence Desktop.

**To enable SmartPairing:**

1. Click **Settings**.
2. Click **SmartPairing**.
3. Select the **Enable SmartPairing** check box.

   If **Auto Detection** is turned on, IP addresses of nearby Polycom HDX or RealPresence Group Series systems that have been detected will be listed.

**To share your content with the Polycom HDX or RealPresence Group Series System:**

1. Click **SmartPairing**.
2. Click **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. Click **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**.
To stop sharing content:
   » Click Stop Sharing.

To control calls on the Paired Polycom HDX or RealPresence Group Series System:

1. From the menu bar at the top right of the application, click .
2. Click 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. Click Pair. The following figure shows an example interface of paired HDX system.

Figure: SmartPairing

5. Use the following options to control calls on the paired device.
   - **Content**  Click this button to share your content with the paired device. You can select either a monitor or an application to share.
   - **Place a call**  Click this button and enter a desired number on the right soft keypad to place a call on the paired device.
   - **Mute**  Mute or unmute the call.
   - **Volume**  Adjust the call volume.
   - **DTMF**  Open the DTMF keypad.
   - **Hang up**  End the call form the paired device.

6. Click the Unpair button to end the control.
Use Instant Messaging and Presence

After you log on to the RealPresence Desktop and register to CMA successfully, you can view your name and set your presence status. After you add other people in your contacts and they accept your invitation, you will also view other people's status. The following 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 RealPresence Desktop.
- **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 does not log into RealPresence Desktop, his or her status appears as **Offline**.
- **Unknown**  RealPresence Desktop 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 from the RealPresence Desktop address book, the status of your end points is unknown. Other people who have added you to their contacts can see your correct status.

### Limitations on this Feature

- The instant messaging and presence feature is compatible with devices running the CMA Desktop application.
- The instant messaging and presence feature works properly on RealPresence Resource Manager 8.0 or higher and CMA 6.2.5 or higher.
- The instant messaging and presence feature is only available in managed mode.
- Only Polycom Video Border Proxy™ (VBP®) ST series and RealPresence Access Director™ support fire wall NAT.
- The instant messaging and presence feature can be enabled or disabled together only for RealPresence Desktop 3.1.

Use Chat to Send an Instant Message

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

**To send an instant message:**

1. From the top menu, click the **Chat** tab.
2. Click **Chat**.
3. Select or search a contact and type your message.
4. Click **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 RealPresence Desktop.

**To send an instant message during a video call:**

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

**Set Presence-Related Parameters on RealPresence Resource Manager**

The administrator can set the following parameters on RealPresence Resource Manager:

- **Allow IM/Chat**  
  Allow the IM feature on RealPresence Desktop. The default value is true.
- **Auto Accept Invitation**  
  Allow people to add you to their contact lists without your verification. The default value is false.
- **Allow IM Storage**  
  Allow RealPresence Desktop to save your instant messages on your local computer. The default value is true.

**To set the value of these parameters:**

1. Log into RealPresence Resource Manager.
2. Go to the Provisioning Profiles page. You can open this page by choosing **ENDPOINT > Dynamic Management > Provisioning Profiles** from the top menu.
3. Select **Default Admin Config Provisioning Profile** from the Profile Name column.
4. Click **Edit Default** from the ACTIONS panel on the left. You will see the Edit Profile dialog.
5. Click **Software Endpoint Settings** on the left. You will see the above parameters.
6. Click **OK** to save the changes.

**Track Problems**

**View Log Files to Track Problems**

Viewing the log file is helpful in determining the causes and solutions for problems. Before you open log files, you must exit RealPresence Desktop. You can find the log files from the following locations:

- Windows 7 and 8: C:\Users\yourAlias\AppData\Roaming\RealPresence Desktop\log.
- Windows XP: C:\Documents and Settings\User\ApplicationData\RealPresence Desktop\log.

**To collect and e-mail the log file:**

1. Click on the application's title bar.
2. Click **Log Collector**.
3. Enter the recipient's e-mail address.
4. Click **Send**.

**To exit RealPresence Desktop:**

1. Click on the application's title bar.
2. Select an option from the menu.
   - Select **Close** to keep the application running in the system tray.
Select **Exit** to shut down the application.

**No device can be connected when using SmartPairing**

If no room system is 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 44.1KHZ and deselect 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.