Polycom® RealPresence® Desktop for Mac® OS X
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RealPresence Desktop Modes of Operation

RealPresence Desktop has two 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 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 RealPresence Desktop 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.

About the RealPresence Desktop Application

Before you begin configuring RealPresence Desktop, get familiar with the application’s user interface. The following illustrations show the RealPresence Desktop main window and in-call toolbar.

RealPresence Desktop for Mac main window
RealPresence Desktop for Mac in-call toolbar

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Get Started with RealPresence Desktop

When first signing into RealPresence Desktop, you have two options based on the mode of operation:

- Choose Enterprise Sign-In when using RealPresence Desktop in managed mode
- Choose Individual Account when using RealPresence Desktop in standalone mode

Get Started with RealPresence Desktop in Standalone Mode

When you purchase RealPresence Desktop from an authorized Polycom reseller, you will receive either a physical or electronic document that includes a license number and directions for authorizing the license through the Polycom Support web page.

Following authorization, you can use RealPresence Desktop for as long as the service and support are in effect. RealPresence Desktop operates in managed mode as it operates in managed mode; however, in
standalone mode, RealPresence Desktop does not have access to provisioning, monitoring, or Active Directory services. You may need to contact your IT administrator for information about these services during the setup procedure.

To get started with RealPresence Desktop in standalone mode:

1. Start RealPresence Desktop and in the Individual Account box click Enter.
2. Choose one of the following:
   - Click Trial to use the RealPresence Desktop application as a trial.
   - Click 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.

To enable RealPresence Desktop to discover the provisioning server:

1. Start RealPresence Desktop and in the Enterprise Sign-In box 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 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 into the Server field.
4. Click Sign In. RealPresence Desktop will discover the provisioning server automatically.

Perform Initial Configuration of RealPresence Desktop

To perform the initial configuration of RealPresence Desktop:

1. Once signed in, click .
2. Go to Settings > Profile to configure and enable the profile photo and virtual business card features.
   - If not in Managed mode, enter the profile information to display on your virtual business card.
   - Click and browse to and select a profile photo.
   - Check Virtual Business Card and Profile Photo and then click OK.
3. Go to Settings > General and configure the following settings:
   - Display Name  The name that will be displayed to the far end during a call.

Login tip
When the XMPP service stops working, if you sign into more than one Polycom® RealPresence® Desktop, the later Polycom® RealPresence® Desktop will fail to register H.323 because of a duplicate alias error.
In managed mode, your login name will be displayed to the far end, not your display name.
In standalone mode, enter the name you want displayed to the far end during a call.

- **Automatically start when the system starts**  Specifies whether or not to start RealPresence Desktop automatically when you start your computer.
- **Auto-answer incoming calls**  Specifies whether or not to answer incoming calls automatically.
  - **Audio mute auto-answered calls**  Enables the system to answer calls without turning on the microphone.
  - **Video mute auto-answered calls**  Enables 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

These settings specify whether the RealPresence Desktop system should open automatically when you click these link types. Ensure the links are not used by other applications such as Lync, otherwise, restart RealPresence Desktop to register these links again to take effect.

4  Go to **Settings > Call Rate** to 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. 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 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 impose this rate.

5  Also on the **Call Rate** tab, chose one of the following items:

- **Never Use QoS**  Disable QoS on Polycom® RealPresence® Desktop.
- **Let Provisioning Server Control QoS**  Let Polycom® RealPresence® Desktop use the QoS value set on the provisioning server.

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

6  In standalone mode only:

- Go to **Settings > H.323** to configure the following options.
  - **Enable H.323 Calls**  Enables or disables H.323 calls.
  - **Gatekeeper Registration**  Enables or disables 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.
- Go to **Settings > SIP** to configure the following options:
  - **Enable SIP Calls**  Displays the configuration settings for SIP calls.
SIP Registration Enables or disables 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 SIP registrar server.
SIP User Name Enter the user name for authentication with a registrar server.
Authorization Name Enter the name to use for authorization when registering with a SIP registrar server.
Password Enter the password for authentication with a registrar server.
Transport Protocol Choose the protocol that the system uses for SIP signaling: Options include: TCP Reliable transport, UDP Best-effort transport and TLS Encrypted transport.

To specify audio input and output devices, go to Settings > Device, and configure the following options:

- **Camera** Select a camera to use for calls.
- **Microphone** Select a microphone to use for calls.
- **Speaker** Select a speaker to use for calls.
- **USB Headset Acoustic Fence** Select this option to enable Polycom Acoustic Fence™ which masks background noise during calls.

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

- **Enable NoiseBlock** Select this option to mask percussive sound (such as tapping and hands clapping) when no one is talking in a meeting.

In standalone mode only, go to Settings > 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.

**Media port for SIP and H.323 calls**
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.

- **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 by doing 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.
9 Go to **Settings > SmartPairing** to enable or disable SmartPairing™.
   - **Enable SmartPairing**  Select this option to enable SmartPairing.
   - **Auto Detection**  If **Auto Detection** is enabled, the IP addresses of nearby Polycom HDX or RealPresence Group Series systems that have been detected will be listed.

10 Go to **Settings > Test Features** and enter the password 456 to try the following test feature:
   - **Automatic Face Brightness Adjustment**  Enable this feature to adjusts video brightness by detecting the lighting of your face.

   ![Video overexposure]

   In some light environments, your RealPresence Desktop video may be overexposed when you turn on this feature.

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

**Manage Calls**

Use the RealPresence Desktop application to make, answer, reject, or end calls.

- **Intermittent voice in a call**

  When two people talk at the same time from different far ends in a meeting, their voices are intermittent.

To place a call by entering a number:

1. On the dialpad or your keyboard, enter the phone 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 by selecting a number from the corporate directory:

1. Click **A**.
2. Enter part or all of name of the person to call, and then press **Enter**.
3. Click 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.

To answer a call:

   » Click **Answer**.
Call 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 click the Call User button, you can select from the list of devices to place your call.

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 Mac in-call toolbar" for the in-call toolbar picture. Use the in-call toolbar to access additional features of the RealPresence Desktop application (for example, to switch cameras or mute your audio).

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 favorite 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 and First Name
   - Title
   - Department
   - Location
   - Phone
   - E-mail
4. Click Add a device.
5. Enter the Device Name and select the device from the Device Type drop-down list.
6. Complete at least one of the following fields:
   - IP Address IP address of the contact’s endpoint.
   - H.323 Alias Number that gatekeepers use to identify this system. Your organization's dialing plan may define the numbers you can use.
     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 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 twice. This contact will be added to your Favorites list.
To add a contact from a corporate directory to your local address book:

1. Click .
2. Enter part or all of name of the person to call, and then press Enter.
3. From the search results, select the contact name.
4. Click Save to Favorites.

To search for a contact:

1. Click .
2. Enter part or all of name of the person to call, and then press Enter.
   Only the people and endpoints that can be called from RealPresence Desktop are returned.
   After you enter a part of a key word for LDAP or local search, all the mapping results will be returned
   and listed after a short time.
3. Click the contact name. You can select from the list of the devices belonging to this contact to place
   your call.

To delete a contact:

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

To view organization hierarchy:

1. Click .
2. Click the Organization tab to see 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.

Share Content

You can share content during a call or on a paired Polycom HDX or RealPresence Group Series system.
See Enable and Use SmartPairing 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 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 RealPresence Desktop application.

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

Before using this feature, you must first 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.

   **Mac noise reduction may impact auto detection.**

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

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.

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 to enter a password.
You can also enter a DTMF password using your keyboard without showing the DTMF keypad during a call.
This feature works only when the Polycom® RealPresence® Desktop DTMF keypad is not shown. When you open the DTMF keypad, you can use the keypad only to enter the password.

Hang up  End the call from 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 to 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 endpoints 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 available only in managed mode.
- Only Polycom Video Border Proxy™ (VBP®) ST series and RealPresence Access Director™ support firewall NAT.
- The instant messaging and presence feature can be enabled or disabled together.

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 .
2  Click to select or search for a contact and type your message.
3. 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.

When you chat with a person in your contacts list, RealPresence Desktop enables you use video call at the same time. You can click the **Call** button to make calls directly to the person whom you are chatting with.

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

1. Click **** from the in-call toolbar.
2. Click **+** to select or search for a contact and type your message.
3. 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.

**Import and Export User Profile**

This feature is available in both managed mode and standalone mode. RealPresence Desktop supports the same file formats as Polycom CMA Desktop and Telepresence m100 supports. With this feature, you can
import user data of RealPresence Desktop, Polycom CMA Desktop or Telepresence m100. You also can export the user data to another Polycom® RealPresence® Desktop system.

**User data import and export**

- The user data configured on CMA Desktop and Telepresence m100 that also works on Polycom® RealPresence® Desktop can be imported (for example, auto-answered incoming calls, specified sign-in server, SIP registration settings).
- Some CMA Desktop and Telepresence m100 user data cannot be imported to RealPresence Desktop. For example, group in local contact, auto sign in, chat state, presence auto accept invitation, and configured on CMA Desktop cannot be imported.
- For Polycom® RealPresence® Desktop, LDAP contacts saved in the local contacts and local contacts can be imported and exported. Test features are also exported and imported.
- Dialing preferences cannot be imported and exported.

**To export user profile:**

1. Log into Polycom® RealPresence® Desktop.
2. Click *RealPresence Desktop* on the top left menu of Mac.
3. Click *Export User Profile* as shown in the next figure.
   ![Export User Profile](image)
4. Specify the file name and save the file.
5. Select the user data that you want to export.
6. Click OK to export the data.

**To import user profile:**

1. Log into Polycom® RealPresence® Desktop.
2. Click *RealPresence Desktop* on the top left menu of Mac.
3. Click *Import User Profile*.
4. Select the file containing user data. The file can be a file exported from Polycom® RealPresence® Desktop, Polycom CMA Desktop, or Telepresence m100 from another PC.
5. Select the user data that you want to import from the file.
6. Click OK to import the data. After the data is imported successfully, Polycom® RealPresence® Desktop will restart to apply the changes.

**Enable or Disable Virtual Business Card**

**To enable or disable the virtual business card feature:**

1. Click ✉️.
2. Go to Settings > Profile.
3. To enable the virtual business card feature when in managed mode, simply check the Virtual Business Card option and click OK. Your profile information comes from the provisioning server.
4. To enable the virtual business card feature when in standalone mode, enter your name, title, and location, check the Virtual Business Card option and click OK.

Enable or Disable Profile Photo

To enable or disable the profile photo feature:

1. Click 📷.
2. Go to Settings > Profile.
3. Click 📷 and browse to and select a profile photo.
4. Check Profile Photo and then click OK.

Troubleshooting

This section describes the problems you may encounter and offers possible solutions.

View Log Files to Track Problems

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

- Mac: /Users/username/Library/Application Support/Polycom RealPresence Desktop

To collect and e-mail the log file:

1. Click Help on the application's title bar.
2. Click Send Log.

To exit RealPresence Desktop:

1. Click Polycom RealPresence Desktop on the application's title bar.
2. Select an option from the menu.
   - Select Hide RealPresenceDesktop to keep the application running in the system tray.
   - Select Quit RealPresenceDesktop to shut down the application.

SmartPairing Detection Issues

You may come across the following problems when using SmartPairing:

- If no device can be detected, check the following:
  - Ensure that SmartPairing and Telnet are enabled on the Group Series and HDX system.
  - ensure that Ambient noise reduction is disabled under System Preferences > Sound.
- When there are several HDX or RealPresence Group Series systems nearby that are all configured to support ultrasound-based auto detection, your RealPresence Desktop application may fail to detect them all, or may return the 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 password for remote access on HDX, Polycom® RealPresence® Desktop cannot pair with this HDX.

**Polycom® RealPresence® Desktop Fails with H.323 Registration**

If Polycom® 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 using the same user account, the second RealPresence Desktop 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 the second RealPresence Desktop.

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