RealPresence® CloudAXIS™ Suite

RealPresence® CloudAXIS™ Suite

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Contents

About This Guide

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

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

Conventions Used in this Guide

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

Terms and Writing Conventions

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

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

Information Elements

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

Icons Used in this Guide

Name	Icon	Description
Note		The Note icon highlights information of interest or important information needed to be successful in accomplishing a procedure or to understand a concept.

Name	Icon	Description
Administrator Tip		The Administrator Tip icon highlights techniques, shortcuts, or productivity related tips.
Caution		The Caution icon highlights information you need to know to avoid a hazard that could potentially impact device performance, application functionality, or successful feature configuration.
Warning		The Warning icon highlights an action you must perform (or avoid) to prevent issues that may cause you to lose information or your configuration setup, and/or affect phone or network performance.
Web Info		The Web Info icon highlights supplementary information available online such as documents or downloads on support.polycom.com or other locations.
Timesaver		The Timesaver icon highlights a faster or alternative method for accomplishing a method or operation.
Power Tip		The Power Tip icon faster, alternative procedures for advanced administrators already familiar with the techniques being discussed.
Troubleshooting		The Troubleshooting icon highlights information that may help you solve a relevant problem or to refer you to other relevant troubleshooting resources.
Settings		The Settings icon highlights settings you may need to choose for a specific behavior, to enable a specific feature, or to access customization options.

Typographic Conventions

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

Typographic Conventions

Convention	Description
Bold	Highlights interface items such as menus, soft keys, file names, and directories. Also used to represent menu selections and text entry to the phone.
Italics	Used to emphasize text, to show example values or inputs, and to show titles of reference documents available from the Polycom Support Web site and other reference sites.

Convention	Description
Underlined Blue	Used for URL links to external Web pages or documents. If you click on text in this style, you will be linked to an external document or Web page.
Blue Text	Used for cross references to other sections within this document. If you click on text in this style, you will be taken to another part of this document.
Fixed-width-font	Used for code fragments and parameter names.

What's in This Guide?

This user guide is organized into four chapters. The first chapter, *Getting Started,* provides a list of requirements needed for the portal to run properly. Chapter two gives an overview of the portal including how to create, join, view, leave, and manage meetings. Chapter three shows you how to participate in meetings. The final chapter contains a list of troubleshooting steps.

- **Chapter 1: Getting Started**   This chapter gives you the minimum system requirements needed for using a browser to create and participate in online conference meetings.

- **Chapter 2: Creating and Managing Your Meetings**   This chapter shows you how to use CloudAXIS to create, schedule, and manage your meetings.

- **Chapter 3: Participating in Meetings**   This chapter shows you how to join, participate in, and leave a meeting.

- **Chapter 4: Troubleshooting**   This chapter shows you solutions to issues you may experience when using CloudAXIS.

- **Chapter 5: Getting Help**   This chapter shows you where to find support documents.

- **Chapter 6: End-User License Agreement**   This chapter shows you the Polycom end-user license agreement details.

Chapter 1: Getting Started

The CloudAXIS portal enables you to create and participate in recordable online video conference meetings. Depending on the organization's policy, you can also invite contacts on Skype™, Facebook, and/or Google Talk™ to join the meetings. Before you get started with using the portal, be sure you meet the requirements listed in this chapter.

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

- Minimum Software Requirements
- Minimum Software Component Requirements
- Minimum Browser Requirements
- Supported Bandwidth, Video Format, and Resolutions
- Minimum Hardware Requirements

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

Learning the Minimum Requirements

This section shows you the minimum system, hardware, browser, software, network, and bandwidth requirements. You must confirm the requirements listed in this chapter before using the portal. If you experience issues while meeting the requirements, see Troubleshooting.

Minimum Software Requirements

The portal requires Windows XP, Vista, Windows 7, or Windows 8 for PCs

If you are using a tablet or phone device, it must be capable of running the Polycom® RealPresence® Mobile application. Refer to the release notes for Polycom RealPresence Mobile for details of compatible devices.

> **Note: Mac OS**
>
> Mac OS is not currently supported.

Minimum Software Component Requirements

CloudAXIS installs two small plug-ins to enable video and social features: The CloudAXIS Client Plug-in and the CloudAXIS Social Plug-in. The CloudAXIS Client Plug-in enables SIP

audio/video services and is downloaded when accessing CloudAXIS from a device for the first time. The CloudAXIS Social Plug-in enables access to Skype™, Facebook, and Google Talk™ contact lists and is downloaded when accessing social connectors from a device for the first time.

Minimum Browser Requirements

You must meet the following browser requirements to access a meeting.

- IE 8 or later
- Firefox 3.5 or later
- Chrome 11 or later

Supported Bandwidth, Video Format, and Resolutions

The Polycom® RealPresence® CloudAXIS™ Suite supports the bandwidth, video format, and resolutions outlined in the table below.

Table 1: Supported Bandwidth, Video Format, and Resolutions

Bandwidth	Video Format	Resolutions
64 kbps - 511 kbps	QVGA	320x240
512 kbps - 1023	VGA	640x480
1024 kbps - 1920 kbps	720p (HD)	1280x720

Minimum Hardware Requirements

The portal in the Polycom® RealPresence® CloudAXIS™ Suite require the following hardware.

Table 2: Hardware Requirements

Component	Description
Processor	Processor Intel Core i5, 2.5GB or more
RAM	4 GB
Video memory	256 MB or more
Hard drive space	200 MB
Camera	Integrated or external
Audio devices	Standard PC97 audio devices

Component	Description
Monitor	Recommended: 16:9, 1920 x 1080
	Minimum: 1024x768

Chapter 2: Creating and Managing Your Meetings

The portal gives you two options for creating online video conference meetings: meetings that start immediately and meetings scheduled for a later time. To create meetings, you must have a user or admin account. Log in to the portal with your user or admin credentials and select the type of meeting you want to create. Selecting a meeting that starts immediately launches a meeting in your web browser for inviting and interacting with participants. When selecting the scheduled meeting option, enter the meeting parameters and invite participants. When finished, the portal adds the scheduled meeting to a calendar. When the meeting is scheduled, the portal sends an email with a web URL link to the invited attendees. The attendees access the web URL to join the meeting. Note that the meetings are supported on Windows-based machines only and cannot be accessed from a Mac.

The portal enables features such as content share, video privacy, and group chat. For information on using the portal features, see Participating in Meetings.

The following sections of this chapter describe the steps for accessing the portal, creating a meeting that starts immediately, scheduling a meeting for a later time, logging on to your meetings, managing your meetings, and managing your list of contacts for inviting participants:

- Accessing the Portal
- Creating Meetings
- Viewing Your Scheduled Meetings
- Starting Your Scheduled Meetings
- Managing Your Scheduled Meetings
- Managing Your Address Book

Accessing the Portal

Accessing the portal requires obtaining user or admin account login credentials from your CloudAXIS administrator. To log in, enter your login credentials in the CloudAXIS login page. When logged in, you are able to create, schedule, join, and manage your meetings.

> **Note: Portal Access**
>
> Meetings are supported on Windows-based machines only and cannot be accessed from a Mac.

Creating Meetings

This section shows you how to schedule a meeting for a later date and how to start a meeting immediately.

Scheduling a Meeting

To schedule a meeting, log in to the portal and follow the instructions outlined in this section.

1 Select **Schedule**, the *Schedule a Meeting* screen displays, shown next.

2 Enter the following in the *Schedule a Meeting* screen options:

○ **Meeting Name**   Enter the purpose of your meeting. For example, 'Engineering Initiatives Meeting'. This is optional.

○ **Agenda**   Enter a conference description. Information entered in the *Agenda* text box is sent to all the invited participants. This is optional.

- **Date and Time**   Click inside the text box to display a calendar. Use the calendar to schedule the day and use the *Hour* and *Minute* sliders to schedule the start time. When finished, click **Done**.

- **Duration**   Click inside the text box to display *Hour* and *Minute* siders. Use the *Duration's Hour* and *Minute* sliders to schedule the meeting duration. When finished, click **Done**.

- **Use Personal VMR**   Check the *Personal VMR* checkbox and enter your VMR number. This is optional. Note that if your personal VMR requires a passcode, you must select the enter the passcode in the *Attendee Passcode* and *Host Passcode* text boxes.

- **Invite People**   Enter email addresses using one or both of the following procedures:

  » Enter the each email address individually separated with a semicolon

  » Click **Add From Contacts** to select contacts in your address book. The *Select Attendees* screen displays, shown next. Use the search field to find your contacts. Check the box for each contact you want to include and select **Invite to Meeting**. For information about your address book, see Managing Your Address Book.

- **Require Authentication**   To require user ID and password authentication. Active Directory users are always required to enter their username and password credentials. When *Required Authentication* is selected, local users are also required to enter their user ID and password. This is optional.

- **Attendee Passcode**   To require a passcode to enter a meeting, enter a passcode in the *Attendee Passcode* text box. The passcode must be numeric; maximum of 10 characters.

- **Host Passcode**   To require a passcode to enter a meeting as a presenter, enter a passcode in the *Host Passcode* text box. An attendee who enters this passcode will enter the meeting as a presenter. Use this option to ensure security when accessing the meeting from a web URL instead of the portal. The passcode must be numeric with a maximum of 10 characters. This is optional.

3 Click **Schedule**. The *Confirm Details* screen displays, shown next.

Confirm Details

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

[CONFIRM] [EDIT] [CANCEL]

4 Verify the meeting details and click **Confirm**. Each invited participant will receive the *Meeting details* in an email, shown next.

Meeting Invitation

Event

Thursday, March 14, 2013 @ 12:06 AM (UTC TimeZone) for 1hour

Agenda: No Agenda Set Yet

VMR number: <someVMR>

Attendee Passcode: **No passcode required**

Host Passcode: **No passcode required**

Meeting Access

Web URI   https:/SomeURL

SJ SIP

    sip   sip:<SomeSip>

Starting a Meeting Immediately

To start a meeting immediately, log in to the portal and click **Meet Now**. The welcome screen displays with a selection of video preferences. After selecting your video preference, you can invite participants.

For help with selecting your video preferences, see Selecting Video Preferences. For help with inviting participants, see Inviting Participants during a Meeting.

Viewing Your Scheduled Meetings

Select the **Calendar** tab to view your scheduled meetings. When the *Calendar* screen opens, sort through your scheduled meetings by selecting one of the following options:

- **Today**   Displays all meetings you have scheduled for the current day. Select **Prev** or **Next** to navigate through your list of scheduled meetings for that day.

- **Weekly**   Displays your scheduled meetings per week. Select **Prev** or **Next** to navigate through your list of scheduled meetings per week.

- **Monthly**   Displays your scheduled meetings per month. Select **Prev** or **Next** to navigate through your list of scheduled meetings per month.

Starting Your Scheduled Meetings

When a meeting is scheduled, the portal sends each attendant an email containing a web URL. Participants use the web URL to access the meeting but are unable to interact with each other until a presenter has logged in. The presenter can be a participant given a special passcode to enter the meeting as a presenter or it can be the meeting's creator. The meeting's creator automatically has presenter rights and accesses the meeting directly from the portal or using the web URL sent in the email notification. This section explains how the meeting's creator accesses the meeting from the portal. Before you begin, log in to the portal.

To access the meeting from the portal:

1   Select **Calendar.**

2   Locate the meeting. To learn how to locate a meeting in your calendar, see Viewing Your Scheduled Meetings.

3   Select **Host**. The welcome screen displays with options for video preferences. See Selecting Video Preferences.

	Note: Host Option
	The **Host** option appears five minutes before the meeting is scheduled to start. However, the meeting's creator cannot log in until the time the meeting is scheduled.

Managing Your Scheduled Meetings

Scheduled meetings can be edited or deleted by the meeting's creator. When a meeting is edited, all invited participants receive a notification specifying the change. This section shows you how to edit and delete your meetings.

Editing your Scheduled Meetings

This section shows you how to edit a scheduled meeting.

To edit your scheduled meeting:

1 Click **Calendar**.

2 Locate the meeting in your calendar as described in Viewing Your Scheduled Meetings.

3 Click the meeting's ✍ icon. The *Schedule a Meeting* screen displays, shown next.

Schedule a Meeting

Meeting Name

Event

(Max 250 characters)

Date and Time

Agenda

No Agenda Set Yet

Duration

☐ **Use Personal VMR**

233 characters remaining

Invite People

ADD FROM CONTACTS

Please enter a semi-colon seperated list of users.

☐ **Require Authentication**

Attendee Passcode

Host Passcode

SCHEDULE   CANCEL

4 Change the fields you want to edit:

○ **Meeting Name**   Enter the purpose of your meeting. For example, 'Engineering Initiatives Meeting'. This is optional.

○ **Agenda**   Enter a conference description. Information entered in the *Agenda* text box is sent to all the invited participants. This is optional.

○ **Date and Time**   Click inside the text box to display a calendar. Use the calendar to schedule the day and use the *Hour* and *Minute* sliders to schedule the start time. When finished, click **Done**.

○ **Duration**   Click inside the text box to display *Hour* and *Minute* siders. Use the *Duration's Hour* and *Minute* sliders to schedule the meeting duration. When finished, click **Done**.

○ **Use Personal VMR**   Check the *Personal VMR* checkbox and enter your VMR number. This is optional. Note that if your personal VMR requires a passcode, you must select the enter the passcode in the *Attendee Passcode* and *Host Passcode* text boxes.

○ **Invite People**   Enter email addresses using one or both of the following procedures:

  » Enter the each email address individually separated with a semicolon

  » Click **Add From Contacts** to select contacts in your address book. The *Select Attendees* screen displays, shown next. Use the search field to find your contacts. Check the box for each contact you want to include and select **Invite to Meeting**. For information about your address book, see Managing Your Address Book.

○ **Require Authentication**   To require user ID and password authentication. Active Directory users are always required to enter their username and password credentials. When *Required Authentication* is selected, local users are also required to enter their user ID and password. This is optional.

○ **Attendee Passcode**   To require a passcode to enter a meeting, enter a passcode in the *Attendee Passcode* text box. The passcode must be numeric; maximum of 10 characters.

○ **Host Passcode**   To require a passcode to enter a meeting as a presenter, enter a passcode in the *Host Passcode* text box. An attendee who enters this passcode will enter the meeting as a presenter. Use this option to ensure security when accessing the meeting from a web URL instead of the portal. The passcode must be numeric with a maximum of 10 characters. This is optional.

5 Click **Schedule**. The *Confirm Details* screen displays, shown next.

Confirm Details

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

CONFIRM   EDIT   CANCEL

6 Verify the meeting details and click **Confirm**. Each invited participant will receive the *Meeting details* in an email, shown next.

Meeting Invitation

Event

Thursday, March 14, 2013 @ 12:06 AM (UTC TimeZone) for **1hour**

Agenda: No Agenda Set Yet

VMR number: <someVMR>

Attendee Passcode: **No passcode required**

Host Passcode: **No passcode required**

Meeting Access

Web URI   https:/SomeURL

SJ SIP
    sip   sip:<SomeSip>

Deleting your Scheduled Meetings

This section shows you how to delete a scheduled meeting.

	Note: Completed Meetings and Meetings in Progress
	Meetings that have already completed or are currently in progress cannot be deleted.

To delete your scheduled meeting:

1 Click **Calendar**.

1 Locate the meeting in your calendar as described in Viewing Your Scheduled Meetings.

2 Click the meeting's ✖ icon. The meeting is deleted.

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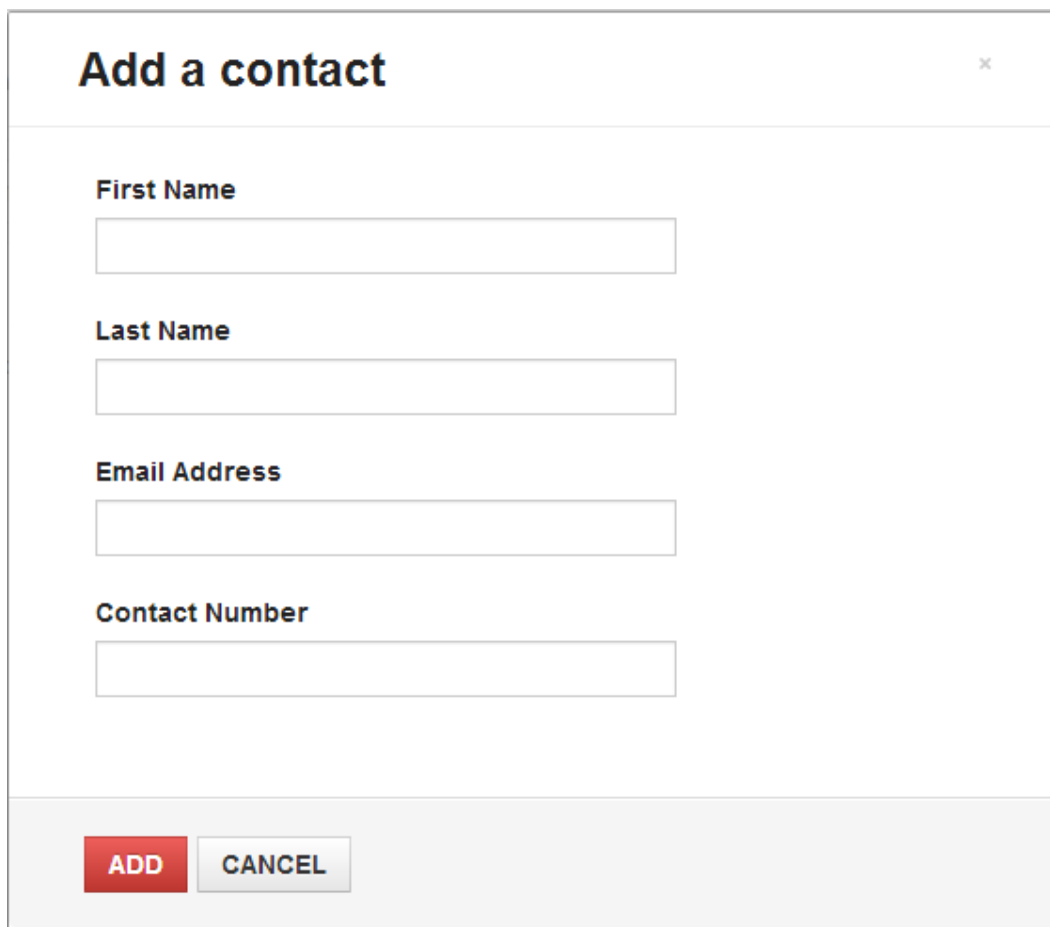
You can store participant contact information in the portal Address Book for future invitations. This section shows you how to access the Address Book and how to add, edit, and delete your contacts.

Adding Contacts

This section shows you how to add contacts to your address book.

To add a contact:

1 Select **Address Book**. The *Contacts* screen displays.

2 Click **Contacts** > **Add a Contact**. The *Add a Contact* screen displays, shown next.
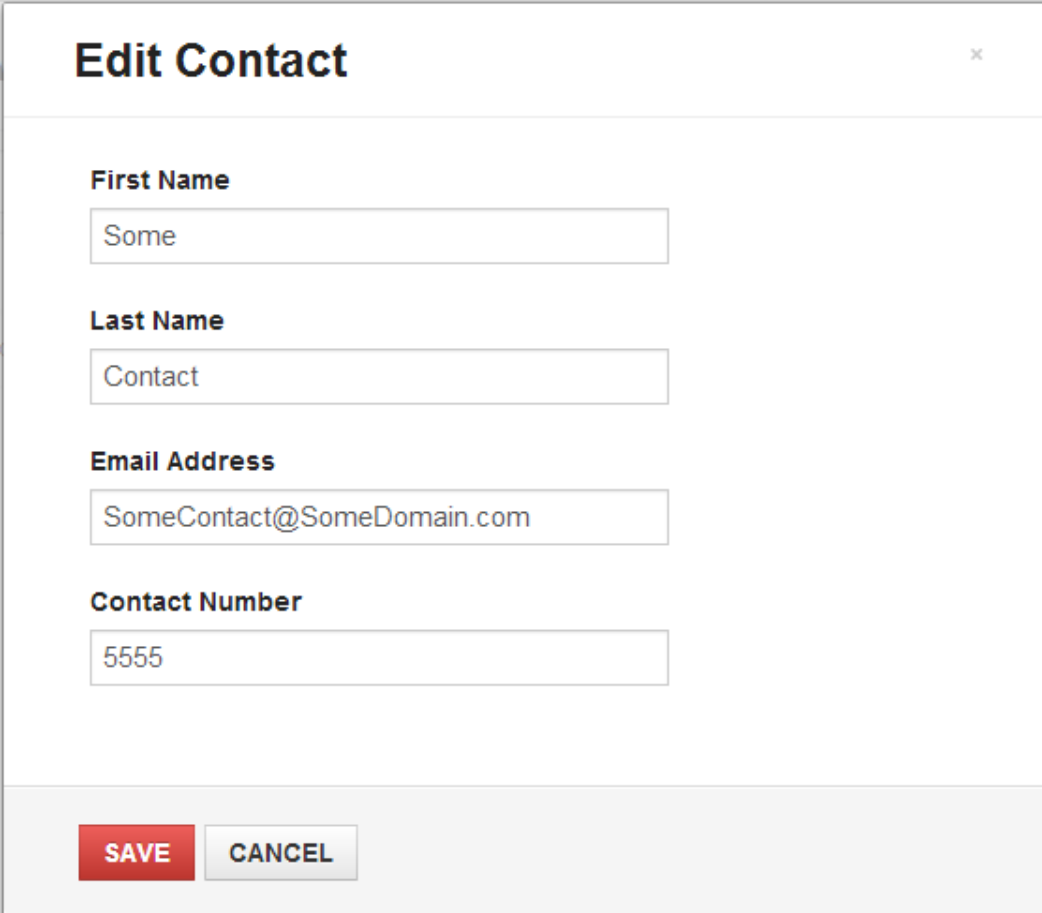
3 Enter the following in the *Add a contact* screen text boxes.

   ○ **First Name**   Enter the contact's first name.

   ○ **Last Name**   Enter the contact's last name.

   ○ **Email Address**   Enter the contact's email address.

   ○ **Contact Number**   Enter the contact's phone number.

4 Click **Add**.

Editing Contacts

This section shows you how to edit a contact in your address book.

To add edit a contact:

1 Click **Address Book**, the *Contacts* screen displays.

2 Search for the contact you want to edit. To search, enter the contact name in the *Search Contacts* text box and tap **Enter** or use the scroll bar.

3 Click on the contact's ☑ icon**,** the *Edit Contact* screen displays, shown next.

4 Edit any of the information in the following text boxes.
   ○ **First Name**   Edit the contact's first name.
   ○ **Last Name**   Edit the contact's last name.
   ○ **Email Address**   Edit the contact's email address.
   ○ **Contact Number**   Edit the contact's phone number.

5 Click **Save**.

Deleting Contacts

This section shows you how to delete contacts from your address book.

To delete a contact:

1 Select **Address Book**, the *Contacts* screen displays.

2 Search for the contact you want to edit. To search, enter the contact name in the *Search Contacts* text box and tap **Enter** or using the scroll bar.

3 Click the contact's ✖ icon. The *Delete this Contact?* screen displays, shown next.

Delete this Contact?   ×

Name

Email Address

DELETE   CANCEL
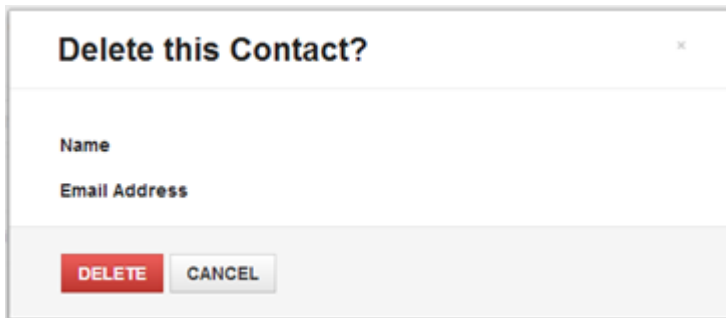
4 Confirm the contact and click **Delete**.

Chapter 3: Participating in Meetings

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

The presenter and participant portal interfaces have similar options such as controlling of their personal audio and video privacy, recording of the meeting, and participating in group chat. The presenter, however, also has special icons that are unavailable to participants. These icons enable presenters to assign presenter rights to participants, invite other participants while the meeting is in session, and end the meeting.

The following sections of this chapter show you how to use the portal meeting interface in detail:

- Joining a Meeting
- Meeting Experience Options
- Recording a Meeting
- Retrieving a Recording of a Meeting
- Assigning Presenter Rights
- Approving Presenter Rights
- Ending a Meeting
- Inviting Participants during a Meeting
- Controlling the Display Screen
- Leaving a Meeting
- Managing Privacy Settings
- Changing Your Camera
- Changing Your Microphone and Speakers
- Requesting Presenter Rights
- Sharing Your Content
- Viewing Shared Content
- Using Group Chat
- Accessing the DTMF Keypad

> **Note: RealPresence Mobile**
>
> If you are participating from a tablet or phone device using the RealPresence® Mobile (RPM) application, see the RPM support site for useful information on using the application.

Joining a Meeting

To join a meeting you created, see Starting Your Scheduled Meetings. If you are logged in to the portal, join a meeting you did not create by selecting **Join Bridge**, shown next. A welcome screen appears with text entry boxes for entering a meeting code and a passcode. Enter your VMR number in the *Meeting Code* text entry box and, if required, enter the passcode in the *Passcode* text entry box, then click **Join Bridge**.

If you are not logged in to the portal, join a meeting you did not create by accessing a web URL sent by the meeting's creator in a chat box or email. You can access the web URL from a PC running a compatible Windows OS or a mobile device supported by the RealPresence® Mobile application. You can select the web URL directly or, if on a PC, you can also paste the web URL in a web browser address bar. When accessed, the login screen displays. If the meeting is passcode required, enter the passcode specified in the emailed announcement using the DTMF pad, shown in Accessing the DTMF Keypad. After entering the passcode, or if a passcode is not required, a prompt displays to enter an email address. After entering your email address, click Sign In. Emails registered with the Active Directory are also prompted to enter network credentials. After signing in, the portal's video preference screen is displayed with a selection of video preferences. For help selecting your video preferences, see Selecting Video Preferences.

Figure 1: Join Bridge Option
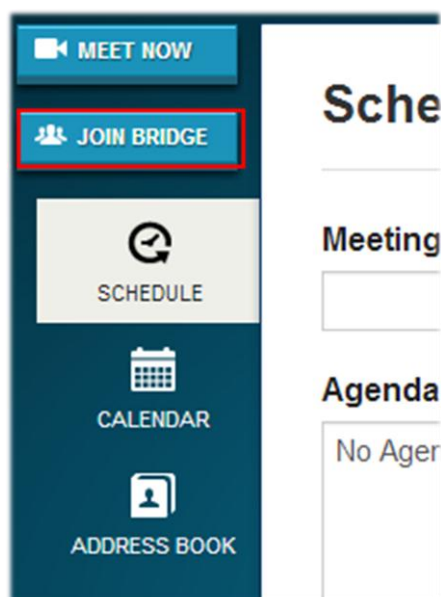
Selecting Video Preferences
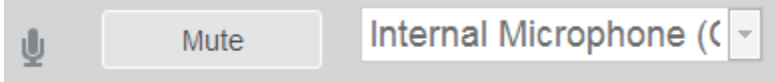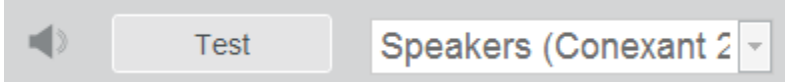
The video preference screen, shown next, displays video options for you to choose before entering a meeting. The meeting's creator enters the video preference screen when selecting the **Meet Now** option and when accessing a scheduled meeting from the portal. Participants enter the video preference screen after accessing an invitation through an instant message or after signing in from an emailed URL.

Figure 2: Portal Video Preference Screen
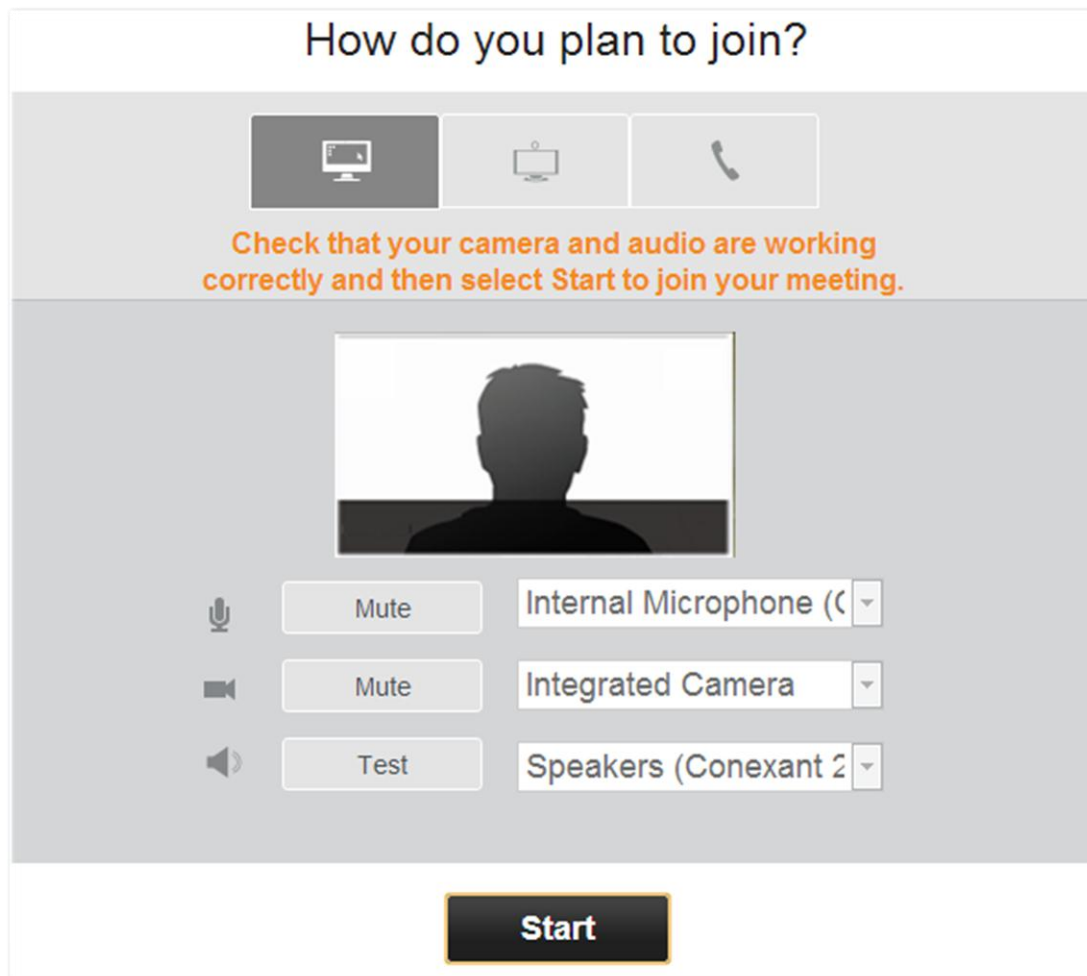
The portal's video preference screen displays three options for entering the meeting. Each option is described in the Video Preference Description Table. Select your preferred option and click **Start**. If you are selecting the meeting's **Start** button from a device running the RealPresence® Mobile application, the application launches automatically. If the RealPresence® application is not installed, you are directed to the appropriate application store to install RealPresence® Mobile.

Table 3: Video Preference Description Table

Icon	Description
	Select this icon to access and participate in the meeting from a device such as a laptop. This option gives you the following pre-meeting options: **Microphone** The microphone options, shown next, includes a Mute button to enter the meeting without an audio stream and a drop-down menu to select the microphone you want to use. **Camera** The camera options, shown next, include a video Mute button to enter the meeting without a video stream and a drop-down menu to select the camera you want to use. **Speaker** The speaker options, shown next, include a Test button to test your speakers and a drop-down menu to select the speakers you want to use.
	Select this option to access features such as group chat and roster while using a different device for video streams such as a Polycom VVX or HDX. When this option is selected, you must choose the protocol: SIP or H.323. When selected, the interface to the meeting is launched. Select **OK, I am in** when you have successfully entered the meeting.
	Select this option to access features such as group chat and roster while using a phone instead of your camera and microphone. Selecting this option gives you a phone number to call in. Select **OK, I am in** when you have successfully entered the meeting.

 Note: Event Viewing Requirement

All meetings require the presenter to be logged in before the meeting session can start; without the presenter, participants are unable to view or interact with each other.

Meeting Experience Options

Meetings are viewed in a screen that provides several video conference options. Some options are available to presenters only while others are available to both presenters and participants. This section shows you an example meeting experience screen with a table that shows you each button, tells you who can access the button, and gives you a description of the button's function.
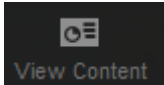
Figure 3: Meeting Experience Screen
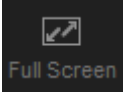
Figure 4: Meeting Experience Options

Icon	User Type	Description
	All attendees.	**Presenter** Ends the meeting. See Ending a Meeting.
		Participants Leave the meeting. See Leaving a Meeting.
	All attendees.	Records the meeting. Recording a Meeting.
	All attendees.	Accesses group chat. See Using Group Chat.

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Icon	User Type	Description
👥	All attendees.	Displays roster. When accessed by a participant, a list of meeting attendees is displayed. Presenters, however, can access selections to assign presenter rights, drop a participant from the meeting, and control the audio and video streams of any participant in the roster list. See also: • Assigning Presenter Rights • Approving Presenter Rights
📋	All attendees.	Opens up the menu with an option for presenters to access contact lists and for participants and presenters to access the following: • Call Info • Help, Audio • Settings • Camera Settings • Keypad • Video Stats. See also: • Inviting Participants during a Meeting • Changing Your Camera • Changing Your Microphone and Speakers • Requesting Presenter Rights

Icon	User Type	Description
	Presenters	Activates content share. This option is only available to presenters. For more information, see the following: • Assigning Presenter Rights • Approving Presenter Rights • Sharing Your Content
	All attendees	Opens your default email service and automatically enters the meeting details in the email body. See Inviting Participants with an Email.
View Self	All attendees	Toggles your own video stream display in your interface screen. For more display options, see Controlling the Display Screen.
View Main Video	All attendees	Toggles the video stream display of all other meeting attendees in your interface screen. For more display options, see Controlling the Display Screen.
View Content	All attendees	Toggles the video stream display of shared content in your interface screen. For more display options, see Controlling the Display Screen.
Mute Audio	All attendees	Mutes your audio stream. See Muting and Unmuting Your Microphone.
Audio Muted	All attendees	Reactivates muted audio stream. See Muting and Unmuting Your Microphone.
Mute Video	All attendees.	Deactivates your video stream. See Hiding and Displaying Your Video Stream.

Icon	User Type	Description
Video Muted	All attendees.	Reactivates a video stream. See Hiding and Displaying Your Video Stream.
Full Screen	All attendees.	Toggles the video display size. See Controlling the Display Screen.

Recording a Meeting

Any meeting attendee can record the meeting. When a meeting is recorded, all of the meeting's video, audio, group chat, and shared content is included. The recording begins when the ⊙ icon is selected. When recording is activated, a message is sent notifying all meeting attendees that they are being recorded.

Recording is stopped when any attendee reselects the ⊙ icon or when the presenter logs out of the meeting, closes the browser, or selects ▬ (see Ending a Meeting).

> **Note: Recording Meetings**
> See your RSS admin to confirm that meetings can be recorded.

Retrieving a Recording of a Meeting

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

Assigning Presenter Rights

Presenters assign presenter rights to other participants, enabling the participants to share content in a meeting. This section shows you how to assign presenter rights to a participant.

To assign presenter rights:

1 Click the 👥 icon. The roster displays a list of name cards for each attendee in the meeting, shown next.

25
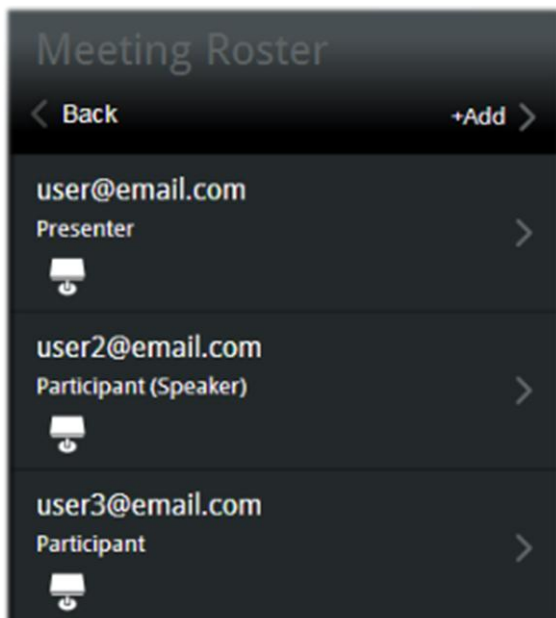
2 Locate the participant to receive presenter rights and select the participant's icon.

Approving Presenter Rights

When a participant requests presenter rights, a blue bubble appears in the roster icon with a number for each request, shown next.

Only presenters receive and approve presenter right requests, enabling the participant to share content in a meeting. This section shows you how to approve a participant's request for presenter rights.

To approve presenter rights:

1 Click the icon.

The roster displays the name card for each attendee in the meeting, shown next.
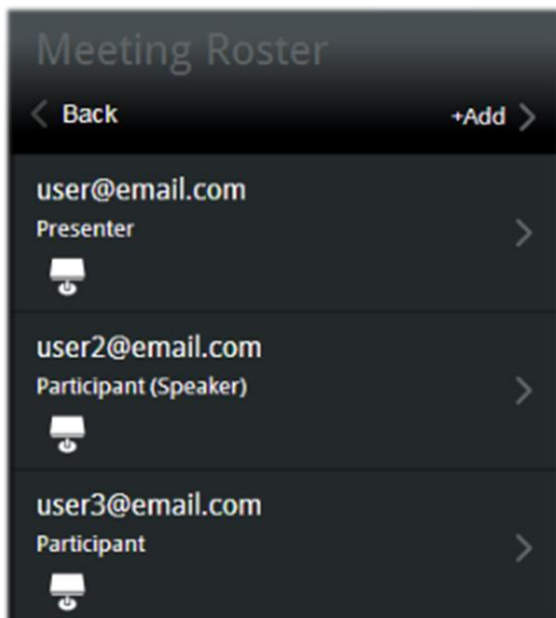
The name card of the participant who requested presenter rights flashes off and on.

2 Select the icon associated with the flashing name card.

Ending a Meeting

Only a presenter can end a meeting. The presenter ends the meeting by selecting the
icon. The *Meeting Place* confirmation screen appears, shown next.
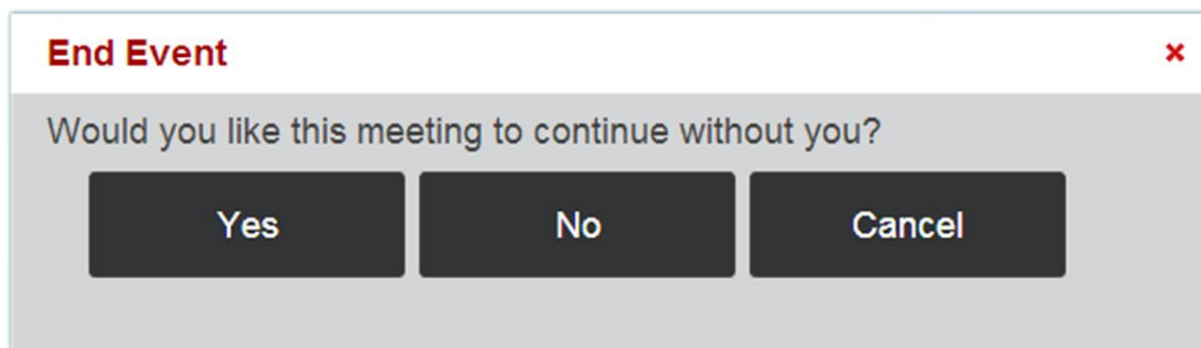
Select **Yes**.

Inviting Participants during a Meeting

The portal enables two ways of inviting users to a meeting: via social connector contact lists and
via email message.

Inviting Participants with an Email Message

The portal enables you to invite participants using your default email service. This section shows you how presenters send email invitations while a meeting is in session.

To invite participants from the portal interface screen, click the ✉ icon to open up a new email message from your default email service. The email auto-populates with a web URL to join the meeting. Enter the email addresses of the participants you want to invite then send the email.

The Inviting Participants from Your Social Connector Contact Lists
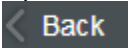
The portal enables you to invite participants from your Skype™, Google Talk™, and Facebook contact lists. Presenters use the social connector access to invite participants while a meeting is in session. This section shows you how presenters send meeting invitations while a meeting is in session.

To invite participants:

1 From the portal interface screen, click the 📋 icon to display the portal's menu, shown next.

> **Note: Menu Options**
>
> Instead of the portal's menu, a previous menu selection may appear. If you do not see the portal's menu options, select ‹ Back .
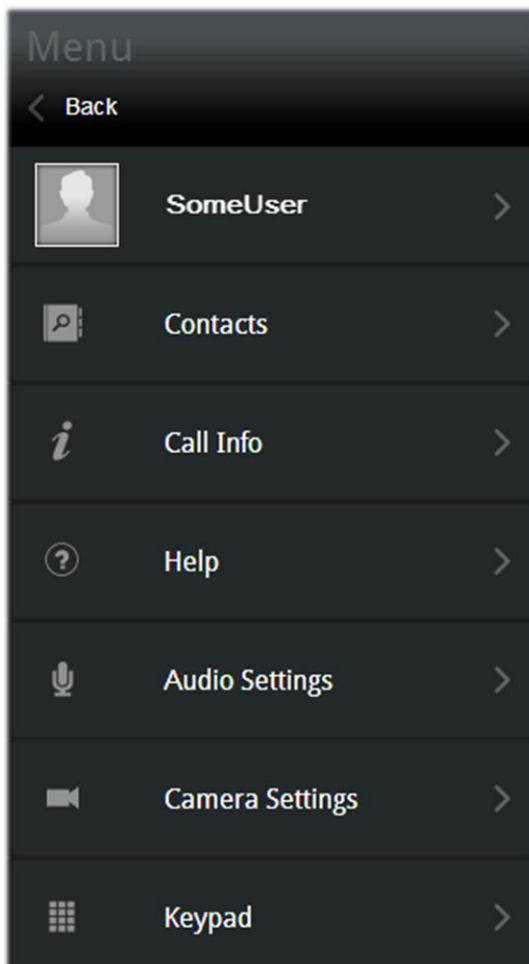
2 Click **Contacts >**. The *Contacts* screen is displayed with options for adding contacts from the following social connectors:

○ **Skype™**   To add contacts from your Skype™ account, you must have Skype™ installed and running on your device. While Skype™ is running:

1. Click **Add Skype Contacts.**

2. Allow <SomeBrowser>.exe to access Skype. Access is permitted one time for each browser.

3. Select **Allow.**

4. Click **Show Contacts**. Any contacts currently online are display in a list. Select the

icon for each contact you want to invite. Select the icon next to the search bar to return to the social contacts options.

○ **Facebook**   To add contacts from your Facebook account:

1. Click **Add Facebook Contacts.**

2. Sign in at the prompt with your Facebook credentials.

3. Click *Log In* (first time access only).

4. Remove unwanted preferences (keep *Access Facebook Chat*).

5. Click **Allow.**

6. Select **Show Contacts**. Your available contacts display in list. Select the ![icon] icon for each contact you want to invite. Select the ![icon] icon next to the search bar to return to the social contacts options.

○ **Google Talk™** To add contacts from your Google Talk™ account:

1. Click **Add Google Talk Contacts**

2. Sign in at the prompt with your Google Talk™ credentials.

3. Select **Show Contacts**. Your available contacts display in list. Select the ![icon] icon for each contact you want to invite. Select the ![icon] icon next to the search bar to return to the social contacts options.

Controlling the Display Screen

The portal displays a video stream for each attendee with a functional camera and any shared content. The video stream for attendees without cameras is replaced by a privacy placeholder, which is also shown when an attendee selects the ![icon] icon (see Hiding and Displaying Your Video Stream).

The portal interface provides the following viewing control options:

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

Leaving a Meeting

Participants leave a meeting by closing their browser window, signing out, selecting ![icon], or when the presenter ends the meeting. For how a presenter ends a meeting, see Ending a Meeting.

Managing Privacy Settings

This section shows you how to activate and deactivate the portal privacy settings. There are two types of privacy: audio and video. These can be used together to enable both audio and video privacy or separately to enable audio-only or video-only privacy.

Hiding and Displaying Your Video Stream

This section shows you how to turn on your video privacy settings to hide your video stream. After turning on your video privacy, you can view the other participants, but they are unable to view you.

To turn on your video privacy, click the icon in the portal interface screen. The icon

changes to . To restore your video stream, select the icon. When your camera is reactivated, your video image displays in each meeting attendee's portal interface screen.

Muting and Unmuting Your Microphone

This section shows you how to mute and unmute your microphone. When muted, you can still hear other participants, but they are unable to hear you.

To mute your microphone, click the icon in the portal interface screen. The icon changes to

. To restore your audio, select the icon.

Changing Your Camera

This section shows you how to change your camera.

To change your camera:

1 From the portal interface screen, click the icon to display your portal's main menu, shown next.

> Note: Menu Options
>
> Instead of the portal's main menu, a previous menu selection may appear. If you do not
>
> see the portal's main menu options, select Back .
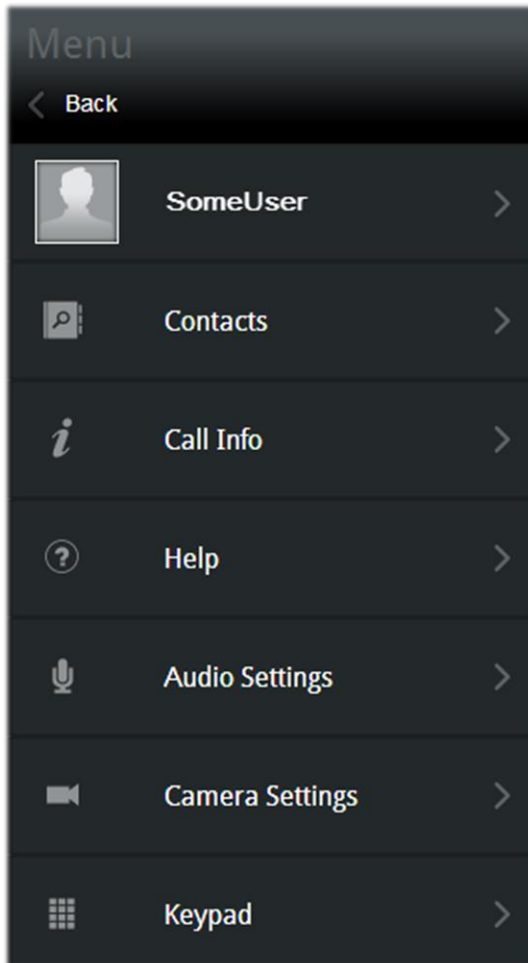
2 Select **Camera Settings >**. The Camera Devices screen appears.

3 Click the *Camera* drop-down menu to select a different camera. The newly selected camera displays the video stream.
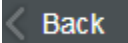
Changing Your Microphone and Speakers

This section shows you how to change your microphone and speakers.

To change your microphone:

1 From the portal interface screen, click the ▤ icon to display your portal's main menu, shown next.

> **Note: Menu Options**
>
> Instead of the portal's main menu, a previous menu selection may appear. If you do not see the portal's main menu options, select 〈 **Back** .
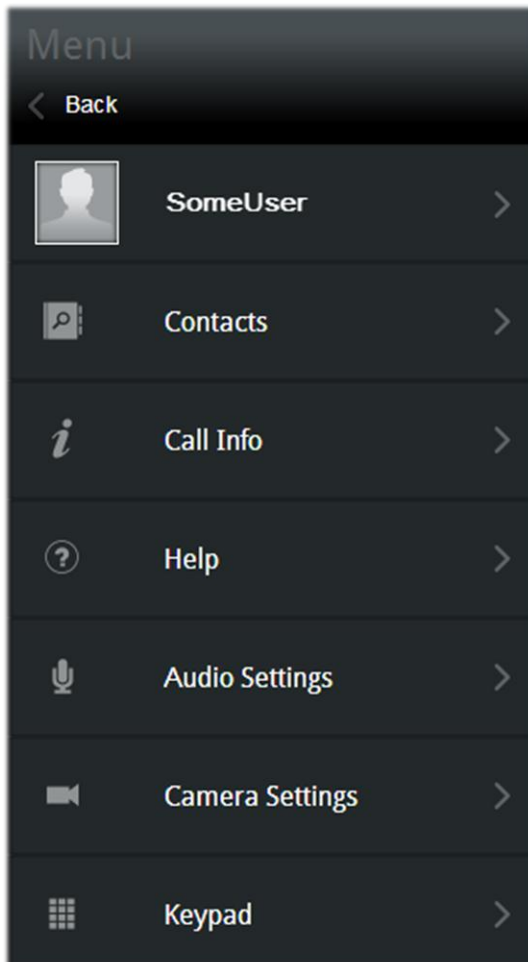
2 Select **Audio Settings >**. The *Audio Devices* screen appears, shown next.
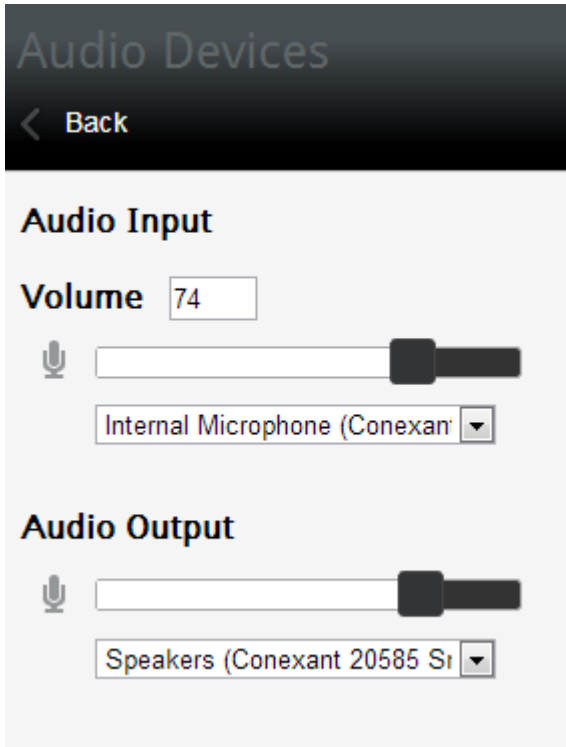
3 The *Audio Devices* screen displays microphone options in the *Audio Input* section and speaker options in the *Audio Output* section. See the following to change your microphone or speakers:

○ Audio Input options:

» To select a different microphone, click the *Audio Input* drop-down menu and select a microphone from the list.

» To change the volume, click the volume slider and move it to the left to increase the volume or the right to decrease the volume.

○ Audio Output options:

» To select different speakers, click the *Audio Output* drop-down menu and select your speakers from the list. Click **Test** to test your newly selected speakers.

» To change the volume, click the volume slider and move it to the left to increase the volume or the right to decrease the volume.
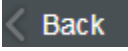
Requesting Presenter Rights

Participants can request presenter rights from a current presenter when they want to share content. This section explains how the request for presenter rights is made. For instructions on how to share content, see Sharing Your Content.

To request presenter rights:

1 Click the [icon] icon. The menu options appear, shown next

> **Note: Menu Options**
> Instead of the portal's main menu, a previous menu selection may appear. If you do not see the portal's main menu options, select [Back].
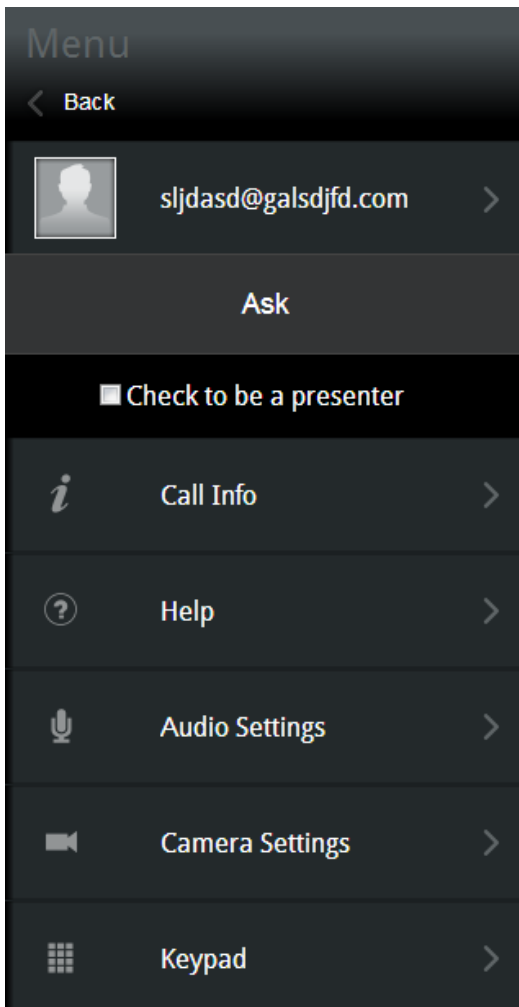
2 Select **Check to be a presenter**.

3 Click **Ask**. The request is sent to the meeting's presenter(s).

Sharing Your Content

When a participant becomes a presenter, they are able to share their desktop. This section shows you how to share your content after receiving presenter privileges. For assigning presenter rights, see Assigning Presenter Rights.

To share your content:

1 From the portal interface screen, click the ![icon] icon to display your share content options, shown next.
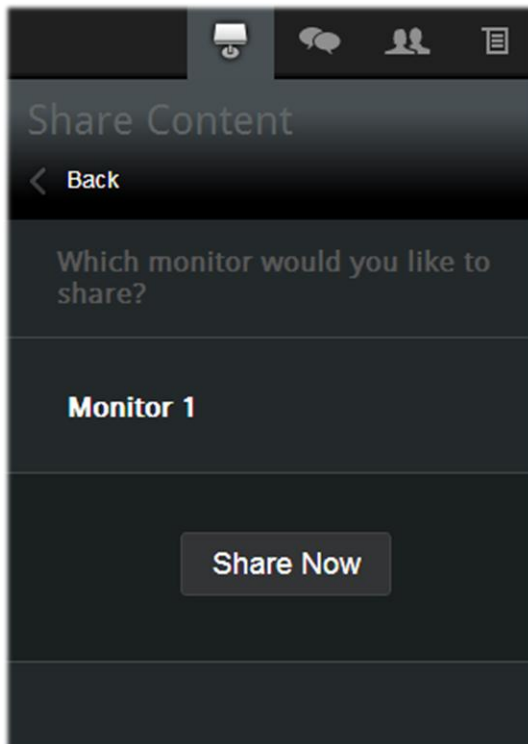
2 Select the monitor you want use (Example: **Monitor 1**).

3 Click **Share Now** to share your desktop in the meeting. The **Share Now** button changes to **Stop Sharing** and three icons appear at the top of your desktop, shown next.

Select the left icon to toggle your audio stream, the middle icon to toggle your video stream, and the right icon to stop the content share from the desktop.

4 To end the content share, select **Stop Sharing** in the portal

Viewing Shared Content

When an attendee initiates content share, the content is automatically visible in the portal interface screen. Selecting **View Content** toggles the content share display.

Using Group Chat

Use group chat for discussions during a meeting. All meeting attendees can view and participate in the chat while the meeting is in progress. To view the group chat, click the icon in your portal interface screen; a *Group Chat* box displays, shown next. Enter your text in the text box at the bottom and click **Send**.
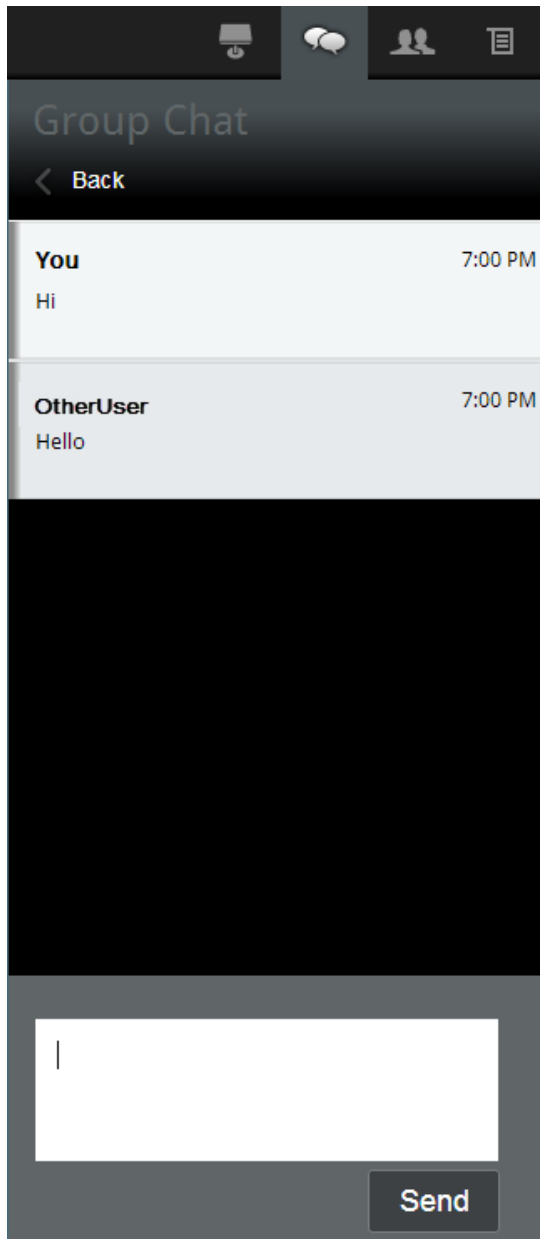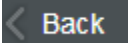
Accessing the DTMF Keypad

A DTMF keypad is available for entering DTMF commands.

To access the DTMF keypad

1 Click the ▤ icon to display your portal's main menu, shown next.

> **Note: Menu Options**
>
> Instead of the portal's main menu, a previous menu selection may appear. If you do not see the portal's main menu options, select ‹ Back .
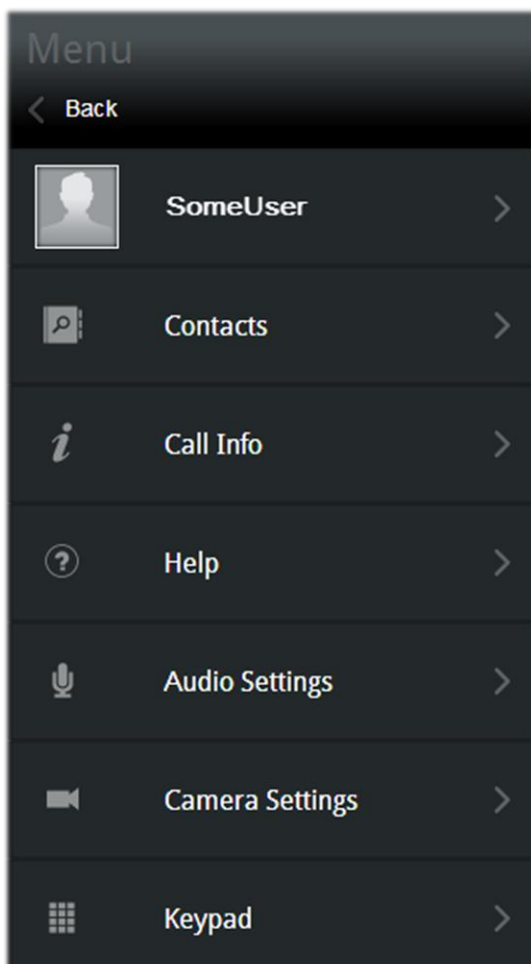
2 Select **Keypad >**. The DTMF keypad appears, shown next.

You can now enter DMTF commands.

Chapter 4: Troubleshooting

This chapter shows you troubleshooting procedures to assist with solving problems such as video, audio, and loading screen errors. If you are experiencing problems, begin with confirming the basic requirements listed in Learning the Minimum Requirements. If all of the requirements are met, search for the troubleshooting section in this chapter that best matches the issue you are experiencing.

This section contains troubleshooting for the following issues:

- Unable to Create Meetings
- Unable to Launch the Welcome Screen
- Unable to Add an Active Directory User
- Unable to Send Email Notifications
- Receiving "Unable to Create a Conference with a Personal VMR" Message
- Receiving "External Server Not Set" Message
- Receiving a Blue Video Screen
- Login Fields Do Not Appear
- Experiencing Issues with Internet Explorer
- Receiving the Camera Silhouette Image
- Forgot and Change Password Requests
- Resolving Audio Issues

Unable to Create Meetings

If you are unable to create meetings, have your administrator confirm the settings outlined in the troubleshooting section of the *RealPresence CloudAXIS Suite Administrators' Guide.*

Unable to Launch the Welcome Screen

When entering a meeting, the welcome screen launches with video options for entering the meeting (see Selecting Video Preferences). If you are unable to launch the welcome screen after creating a meeting, have your administrator confirm the settings outlined in the troubleshooting section of the *RealPresence CloudAXIS Suite Administrators' Guide.*

Unable to Add an Active Directory User

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

Unable to Send Email Notifications

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

Receiving "Unable to Create a Conference with a Personal VMR" Message

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

Receiving "External Server Not Set" Message

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

Receiving a Blue Video Screen

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

Login Fields Do Not Appear

If the Username and Password fields do not appear in the Welcome to CloudAXIS screen, be sure JavaScript is running.

Experiencing Issues with Internet Explorer

If scheduled meetings are not displayed in the *Calendar*, newly created contacts are not displayed in the *Address Book*, or a newly created user is not displayed in *User Management*

when the portal is displayed in Internet Explorer, tap **F12**, select **Cache**, and then **Always Refresh from server**.

Receiving the Camera Silhouette Image

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

Forgot and Change Password Requests

If you have forgotten your password or would like to change your password, contact your administrator.

Resolving Audio Issues

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

Experiencing Echoes during the Meeting

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

Experiencing Low Audio from a Participant

This error is typically noticeable when the participant with low volume first joins the meeting and is typically caused by the participant's microphone level. The participant should try increasing the microphone gain/boost level. Follow the steps below to increase the levels.

To increase the microphone gain/boost level:

1 Click **Start**.

2 Select **Control Panel**.

3 Click **Hardware and Sound**.

4 Click **Sound**.

5 Click the **Recording** tab.

6 Double-click the selected microphone.

7 Click **Levels** tab.

8 Increase the **Microphone Boost**.

9 Increase the **Microphone Level**.

10 Click **OK** until all screens are closed.

Resolving Miscellaneous Audio Issues

Starting with Vista, Windows introduced a process called audiodg.exe to perform audio enhancements. Depending on the enabled enhancements, audiodg.exe can take up a significant amount of CPU usage, which can cause a drop in quality. We have all the required enhancements in our audio library, so disabling the audiodg.exe process and using our enhancements may resolve the issue.

To disable Windows audio enhancements using Windows 7:

1 Right-click the speaker icon in the notification area of the taskbar.

2 In the Playback tab, select **Playback Devices** from the pop-up menu. A list of devices should appear on the screen.

3 Double-click the device with a green checkmark. The properties window should open.

4 Click the **Enhancements** tab at the top.

5 Click to place a checkmark in the **Disable all enhancements** checkbox.

6 Click **OK** to save your changes and close the window.

7 Click **OK** to close the *Playback Devices* window.

Chapter 5: Getting Help

Related Documents

For more information about installing, configuring, and administering Polycom products, refer to Documents and Downloads at Polycom Support.

The Polycom Community

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

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11. Miscellaneous

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11.2 **Entire Agreement**. This Agreement represents the complete agreement concerning the SOFTWARE PRODUCT and may be amended only by a writing executed by both parties. If any provision of this Agreement is held to be unenforceable, such provision shall be reformed only to the extent necessary to make it enforceable.

11.3 **Contact**. If you have any questions concerning this Agreement, or if you desire to contact POLYCOM for any reason, please contact the POLYCOM office serving your country.

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