USER GUIDE

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# Poly Trio Solution

**Getting Help**

For more information about installing, configuring, and administering Poly products or services, go to Poly Support.

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# Before You Begin

**Topics:**


- Audience, Purpose, and Required Skills
- Related Documentation


This *Poly Trio Solution User Guide* contains overview information for navigating and performing tasks with the following Poly Trio Solution products:

- Poly Trio 8300 system
- Poly Trio 8500 system
- Poly Trio 8800 system
- Poly Trio Visual+ content and video accessory
- Poly Trio VisualPro content and video accessory
- Polycom® RealPresence® Group Series video collaboration system

**Note:** The Poly Trio 8500 system, Poly Trio 8800 system, and Poly Trio Visual+ accessory are also known as Polycom Trio™ 8500 system, Polycom Trio™ 8800 system, Polycom Trio™ Visual+ accessory.

Older versions are known as Polycom RealPresence Trio 8500 system, Polycom RealPresence Trio 8500 system, and Polycom RealPresence Trio Visual+ accessory.

## Audience, Purpose, and Required Skills

This guide is intended for beginning users, as well as intermediate and advanced users, who want to learn more about the features available with Poly Trio.

## Related Documentation

To find all Poly partner solutions, see Strategic Global Partner Solutions.

For additional information about the Poly Trio systems, view the following documents on Polycom Support.

- Quick Tips—Provides a quick reference on how to use the system's most basic features.
- Setup Sheet—Describes the contents of your package, how to assemble the solution, and how to connect the system to the network.
- Administrator Guide—Provides detailed information about setting up your network and configuring features.
- Regulatory Notice—Provides information for all regulatory and safety guidance.

You can also view Feature Descriptions and Technical Notifications that describe workarounds to existing issues and provide expanded descriptions and examples for phone settings and features. You can find

these documents on the Polycom Profiled UC Software Features and Polycom Engineering Advisories and Technical Notifications support pages.

# Getting Started with Poly Trio

**Topics:**


- Product Overview of Poly Trio Systems
- Navigating Poly Trio
- Enter Information Using the Onscreen Keyboard
- Entering Information Using the Dial Pad


Before you use your phone, take a few moments to familiarize yourself with its features and user interface.

---

**Note:** As you read this guide, keep in mind that your system administrator configures certain features or your network environment may determine them. As a result, some features may not be enabled or may operate differently on your device. Additionally, the examples and graphics in this guide may not directly reflect available options or what your device screen displays.

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## Product Overview of Poly Trio Systems

The Poly Trio systems support audio-only conference calls with Open-SIP voice platforms along with point-to-point, bridge, and video calls.

The following are the features available on the Poly Trio systems.

### Poly Trio 8300 System Features and Capabilities

The Poly Trio 8300 system supports the following features:

- Placing, answering, and managing audio calls
- Initiating, joining, and managing audio conference calls
- Recording audio calls with USB flash drives
- Viewing and joining scheduled calendar meetings
- Managing contacts, call lists, and directories
- Adjusting call and system settings
- Pairing with Bluetooth-enabled devices
- Checking voicemail messages
- Connecting to a computer over USB
- Sharing content during video calls
- Placing, answering, and managing video calls
- Connecting to a wireless network
- Pairing with the Poly Trio Visual+ content and video accessory
- Pairing with the Poly RealPresence Group Series system

- Placing video calls with a Polycom EagleEye Mini USB camera, Polycom EagleEye Cube USB camera, Polycom Studio camera, or Logitech C930e webcam
- Adjusting the camera and setting camera presets for a connected USB camera

**Poly Trio 8500 System Features and Capabilities**

The Poly Trio 8500 system supports the following features:

- Placing, answering, and managing audio calls
- Initiating, joining, and managing audio conference calls
- Recording audio calls with USB flash drives
- Viewing and joining scheduled calendar meetings
- Managing contacts, call lists, and directories
- Adjusting call and system settings
- Pairing with Bluetooth-enabled devices
- Checking voicemail messages
- Connecting to a computer over USB
- Sharing content during video calls
- Placing, answering, and managing video calls
- Pairing with the Poly Trio Visual+ content and video accessory
- Pairing with the Poly Trio VisualPro content and video accessory
- Pairing with the Poly RealPresence Group Series system
- Placing video calls with a Polycom EagleEye Mini USB camera, Polycom EagleEye Cube USB camera, Polycom Studio camera, or Logitech C930e webcam
- Adjusting the camera and setting camera presets for a connected USB camera

**Poly Trio 8800 System Features and Capabilities**

The Poly Trio 8800 system supports the following features:

- Placing, answering, and managing audio calls
- Initiating, joining, and managing audio conference calls
- Recording audio calls with USB flash drives
- Viewing and joining scheduled calendar meetings
- Managing contacts, call lists, and directories
- Adjusting call and system settings
- Checking voicemail messages
- Connecting to a computer over USB
- Sharing content during video calls
- Sharing content with Apple AirPlay- or Miracast-certified devices
- Placing, answering, and managing video calls
- Pairing with Bluetooth- and Near Field Communication (NFC)-enabled devices
- Connecting to a wireless network
- Pairing with the Poly Trio Visual+ content and video accessory

- Pairing with the Poly Trio VisualPro content and video accessory
- Pairing with the Poly RealPresence Group Series system
- Placing video calls with a Polycom EagleEye Mini USB camera, Polycom EagleEye Cube USB camera, Polycom Studio camera, or Logitech C930e webcam
- Placing video calls with a Polycom EagleEye IV USB camera or Polycom EagleEye Director II camera
- Adjusting the camera and setting camera presets for a connected USB camera

# Poly Trio System Hardware Overview

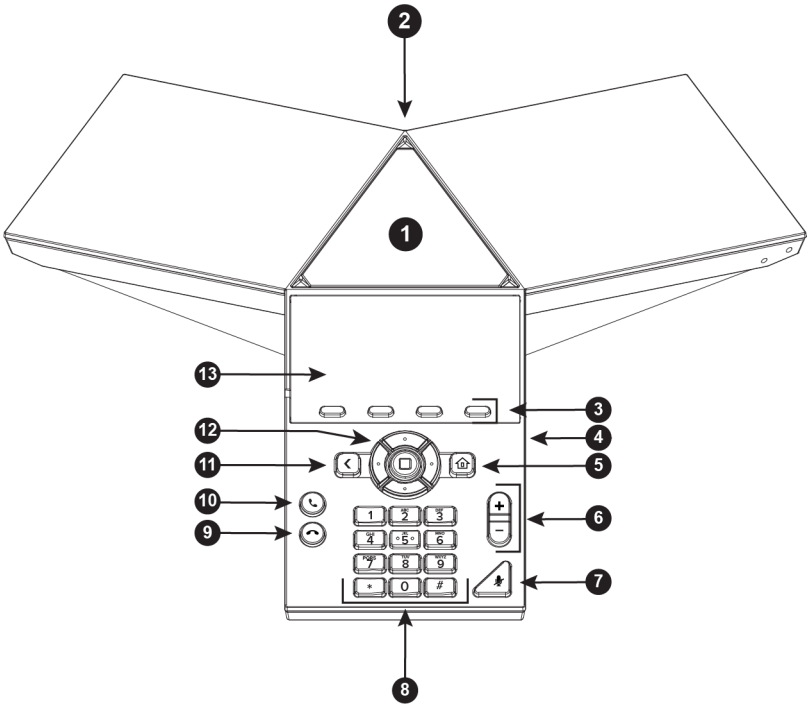
The following figures display the hardware features on the Poly Trio systems. The tables lists each numbered feature shown in its respective figure.

**Related Links**

Connecting a Device using a USB Cable on page 67
Features for Mobility-Impaired Users on page 79

## Poly Trio 8300 System

**Figure 1: Poly Trio 8300 System Hardware Features**



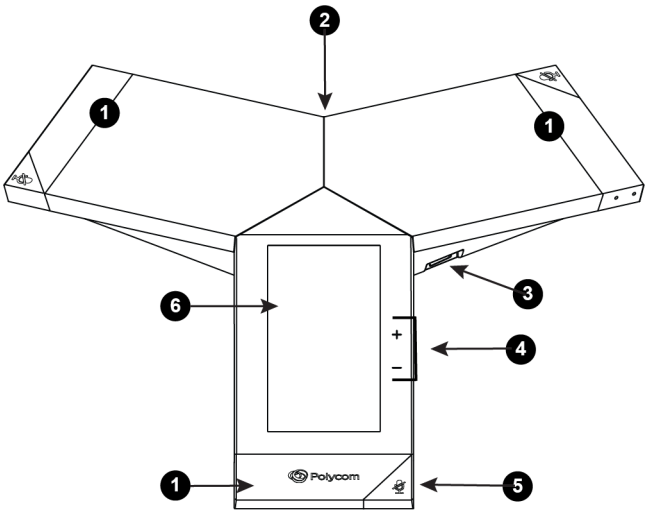

**Poly Trio 8300 System Hardware Feature Descriptions**

| Reference Number | Feature | Feature Description |
|---|---|---|
| 1 | Speaker and Microphones | Sends your audio to call participants and provides audio output for the ringer and speakerphone. |

| Reference Number | Feature | Feature Description |
|---|---|---|
| 2 | USB Device Port | Enables you to connect computer using a USB cable to use the system as a speakerphone for calls or to show content. |
| 3 | Soft keys | Enable you to select context sensitive keys that display along the bottom of the screen. |
| 4 | USB Host Port | Enables you to connect a USB flash drive to the system to record calls. |
| 5 | Home key | Displays the Home screen from other screens and displays the Lines and Calls screen from the Home screen. |
| 6 | Volume keys | Adjust the volume of the audio from the speakerphone and ringer. |
| 7 | Mute key | Mutes the microphones during calls and conferences. The key glows red when activated. |
| 8 | Dial pad | Enables you to enter numbers, letters, and special characters. You can also use the dial pad keys to select menu items that have index numbers. |
| 9 | Hang up | Ends an active call. |
| 10 | Accept call | Accepts an incoming call. |
| 11 | Back key | Enables you to return to the previous screen. |
| 12 | Navigation keys / Select key | Scrolls through information or options displayed on the phone's screen. Selects a field of displayed data. |
| 13 | Screen | Shows a monochromatic display that enables you to view menu options and data. |

## Poly Trio 8500 System

**Figure 2: Poly Trio 8500 System Hardware Features**

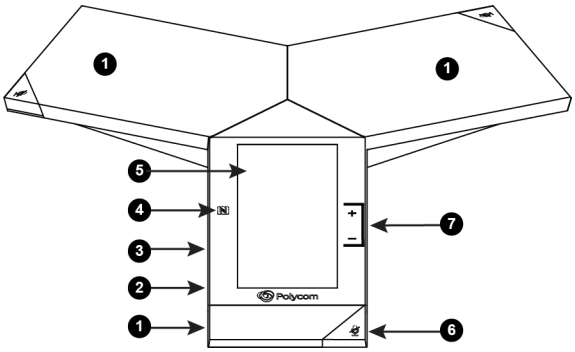



**Poly Trio 8500 System Hardware Feature Descriptions**

| Reference Number | Feature | Feature Description |
|---|---|---|
| 1 | Speaker and Microphones | Sends your audio to call participants and provides audio output for the ringer and speakerphone. |
| 2 | USB Host Port | Enables you to connect a USB flash drive to the system to record calls. |
| 3 | USB Device Port | Enables you to connect computer using a USB cable to use the system as a speakerphone for calls or to show content. |
| 4 | Volume keys | Adjust the volume of the audio from the speakerphone and ringer. |
| 5 | Mute key | Mutes the microphones during calls and conferences. The key glows red when activated. |
| 6 | Touchscreen | Enables you to select items and navigate menus on the touch-sensitive screen. |

## Poly Trio 8800 System

**Figure 3: Poly Trio 8800 System Hardware Features**




**Poly Trio 8800 System Hardware Feature Descriptions**

| Reference Number | Feature | Feature Description |
|---|---|---|
| 1 | Speaker and Microphones | Sends your audio to call participants and provides audio output for the ringer and speakerphone. |
| 2 | USB Host Port | Enables you to connect a USB flash drive to the system to record calls. |
| 3 | USB Device Port | Enables you to connect computer using a USB cable to use the system as a speakerphone for calls or to show content. |
| 4 | NFC | Enables you to connect a Bluetooth-capable mobile phone or tablet using Near Field Communication (NFC). |
| 5 | Touchscreen | Enables you to select items and navigate menus on the touch-sensitive screen. |
| 6 | Mute key | Mutes the microphones during calls and conferences. The key glows red when activated. |
| 7 | Volume keys | Adjust the volume of the audio from the speakerphone and ringer. |

# Navigating Poly Trio

The phone has icons, status indicators, and user screens to help you navigate and understand important information on the state of your phone.

## Accessing Screens on the Poly Trio System

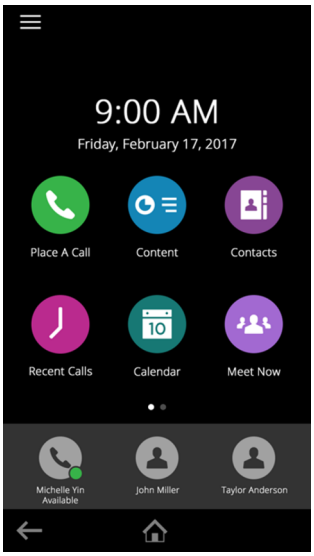
You can access the following screens on your phone:

- Home Screen—Displays your messages, settings, and information.
- Calls Screen—Displays all active and held calls on your line.
- Place a Call screen—Enables quick access to the dial pad, Recent Calls, Contacts, and Calendar.

### Access the Home Screen

The Home screen on Poly Trio system displays the icons you can select to access features, settings, and other information; additional registered lines; and favorites you can save to quickly call contacts.

**Figure 4: Home Screen**




**Procedure**

» Do one of the following:

- Select **Home** ⌂.
- Select **Menu** ≡ and select **Home** ⌂

### Expand or Contract the Home Screen

You can use the Page Indicator to control how many icons display on the Home screen.

The Page Indicator displays on the Home screen beneath the menu options and indicates the page you are currently viewing.

**Procedure**

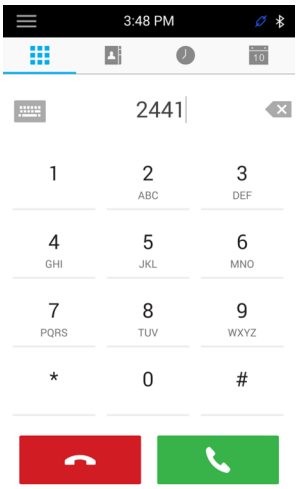
» On the Home Screen, press and hold the Page Indicator.

## Accessing the Place a Call Screen

The Place a Call screen on the Poly Trio system is displayed when you select Place a Call on the Home Screen or when the system is idle and not in use, if set by your system administrator.

From the Place a Call screen, you can access the dial pad, Contacts, Recent Calls, and the Calendar, as shown in the following figure.

**Figure 5: Place a Call screen**

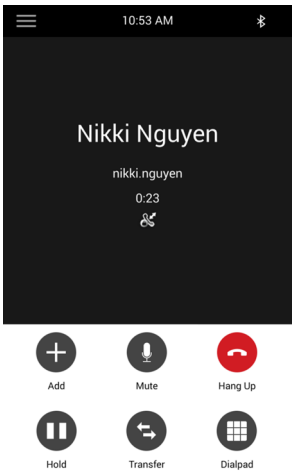



## Accessing the Calls Screen

The Calls screen on Poly Trio systems is displayed automatically when you place a call and you have an active call in progress.

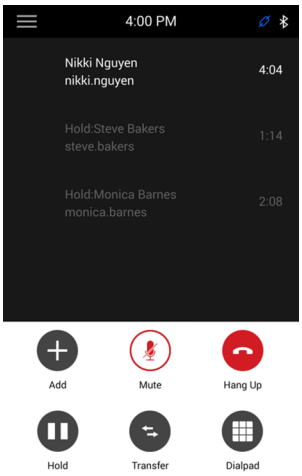
When you have an active call in progress, the name and number of the contact you are talking with and the duration of the call is displayed in the Calls screen, as shown next.

**Figure 6: Active call on the Calls screen**




You can also view active and held calls in progress on the system, as shown next. If the system has multiple lines, active and held calls display under the associated line.

**Figure 7: Multiple calls on the Calls screen**




## Icons and Status Indicators

The following table displays the icons and status indicators that display on Poly Trio systems.

**Icons and Status Indicators**

| Icon | Description | Icon | Description |
|---|---|---|---|
| | Registered Line | | Do Not Disturbed enabled |
| | Unregistered Line | | Call Forwarding enabled |
| | Active Call | | Wireless status<br>(Poly Trio 8800 system only) |
| | USB device attached | | Paired Device |
| | Missed Call | | Bluetooth |
| | Placed Call | | Received Call |

# Enter Information Using the Onscreen Keyboard

The onscreen keyboard available on the Poly Trio systems enable you to enter information into text fields using the touchscreen.

The onscreen keyboard displays on screen automatically when a text field is shown. When a text field requires only numbers, the onscreen keyboard displays only numbers.

The following icons also display on the keyboard:

- **Letters** ABC - Displays alphabetical letters

- **Uppercase** - Shifts to uppercase letters
- **Lowercase** - Shifts to lowercase letters
- **Numbers and Punctuation** - Displays numbers and punctuation marks
- **Special characters** - Displays special characters

**Procedure**

1. Select a text field.
2. Select each character you want to enter.

## Change the Phone Language and Keyboard Layouts

When you set the phone language and country, the phone uses the default keyboard layout for that language. For example, setting the phone language to French sets the phone to the AZERTY keyboard layout. You can enable multiple languages for the phone and switch between keyboard layouts.

**Procedure**

1. On the phone's keyboard, long-press and release the comma key and choose **Input Languages**.
2. Uncheck **Use System Language**.
3. Select one or more available languages and press the Back arrow. Each language you select is enabled along with its default keyboard layout.

   When you enable more than one language, a globe key displays on the phone keyboard.
4. Do one of the following:
   - Long-press the globe key to view and choose from a list of enabled languages. The phone uses the default keyboard layout for the language you choose.
   - Short-press the globe key to rotate through enabled languages. The space bar displays the current language and keyboard layout.

## Close the Onscreen Keyboard

When you are done entering information into a text field, or you want to exit the current screen and return to the previous screen, close the onscreen keyboard.

**Procedure**

» Select **Done**.

# Entering Information Using the Dial Pad

On the Poly Trio 8300 system, you can enter information and edit fields using the dial pad keys on the phone console.

Before you enter information into fields, you can choose how to enter the information using the following soft keys:

- Mode—Enables you to enter just numbers or text in title case, lowercase, or uppercase characters.
- Encoding—Enables you to enter alphanumeric and special characters as well as characters in special languages.

The following table lists the Mode and Encoding options for the dial pad and the onscreen keyboard.

**Mode and Encoding Options**

| Mode Options | Encoding Options |
|---|---|
| Abc (to capitalize the first letter only and use lowercase for the remaining letters) | Abc |
| ABC (to enter uppercase only) | ABC |
| abc (to enter lowercase only) | abc |
| 123 (to enter numbers only) | 123 |
| | ASCII (for regular text) |
| | Latin (to enter accented characters) |
| | Katakana (for Japanese characters) |
| | Unicode (to store characters as double bytes) |
| | Cyrillic (for Russian characters) |

The following table describes how to enter different types of data on your phone using the dial pad.

**Using the Dial Pad Keys to Enter Information**

| Task | Action |
|---|---|
| Enter numbers or characters in uppercase, lowercase, or title case mode | Select **Encoding** or **Mode**, and select **ABC,abc,** or **Abc**. |
| Enter only numbers | Select **Encoding** or **Mode**, and select **123**. |
| Enter text in another language | Select **Encoding**, and select one of the language options. |
| Enter a character | Press a dial pad key repeatedly to view the character options and stop when the character you want to enter is displayed in the field. Wait one second, and enter the next character. |
| Enter a number | Select **Encoding** or **Mode**, and select **123**, or press a dial pad key repeatedly to enter the number that displays on that key. |

| Task | Action |
|---|---|
| Enter a special character | Select **Encoding**, and select **Abc**, **ABC**, or **abc**. Press either the **1**, **0**, **asterisk**, *****, or **pound #** key one or more times to enter one of the following special characters:<br>• **1** key: ! \| ‘ ^ \ @ : 1<br>• ***** key: * - & % + ; ( )<br>• **0** key: / , _ $ ~ = ? 0<br>• **#** key: # > < { } [ ] “ ‘<br>You cannot access special characters when you are in numerical (123) mode. |
| Enter a space | Select **Encoding**, and select one of the alphabetic **Abc**, **ABC**, or **abc**. Press the **0** key.<br>You cannot enter a space when you are in numerical (123) mode. |
| Delete one or more characters | Use the arrow keys to position the cursor to the right of the character, or drag your finger across the characters until the cursor is positioned to the right of the character(s) you want to delete. Press the **Delete** key or press the **<<** soft key. |

# Logging Into and Locking the System

**Topics:**


- Logging in to Poly Trio
- Locking Poly Trio


You can log in to and lock a Poly Trio system with your user credentials provided by your system administrator.

## Logging in to Poly Trio

If your system administrator has set up user credentials for your phone, you can log in to a phone and access your contacts or favorites, settings, and calendar, if enabled.

You can view your personal settings from any phone or system within your organization. Contact your system administrator for your user credentials.

---

**Note:** Some of the features described in this section require access to the Basic settings menu. If your phone requires a password to access the Basic settings menu, contact your system administrator for assistance.

---

### Log In to a Phone

Depending on how your system administrator set up the User Login feature, you may need to log in to a Poly phone before you can use one.

By default, Poly devices do not require you to log in before you can use them. However, if you do not log in, you see the default profile. When you log in, you have full access to your personal settings and your directory. Any settings you change while logged in to a public phone are saved and displayed the next time you log in to any phone.

**Procedure**

1. Select **Login**.
2. Do one of the following:
   - If you see the **User Login** screen.
   - If you do not see the **User Login** screen, navigate to **Settings** > **Features** > **User Login** > **Log In**.
3. From the **User Login** screen, enter your user ID and password, and select **Log In**.

   When your login credentials are accepted, your personal profile displays. If your credentials are not accepted, a message indicating your log in failed is displayed, and the User Login screen is displayed again. Check with your system administrator to confirm your login credentials.

### Log Out of the Phone

After you finish using a public phone, make sure you log out to prevent access to your personal settings.

**Procedure**

1. Select **Log Out** or navigate to **Settings** > **Features** > **User Login** > **Log Out**.

   The Log Out screen is displayed with a confirmation message.
2. Select **Yes**.

   Your personal profile is no longer accessible, and either the User Login screen displays for the next user or the default profile displays.

## Change Your Login Password

You can change your login password from any phone on your network.

**Procedure**

1. Log in to a phone on your network.
2. Navigate to **Settings** > **Features** > **User Login** > **Change User Login Password**.
3. On the **Change User Login Password** screen, enter your old and new password information and select **Enter**.

   Your password is changed. The next time you log in to a phone, you need to enter your new password.

# Locking Poly Trio

If your system administrator has set up to system to lock when it is not in use, you will need to unlock it before you can use the system.

Your system administrator provides you with a user password that you can use to unlock .

When the system is locked, you can:

- Place outgoing calls to emergency and authorized numbers.
- Enter a password to answer incoming calls.

**Related Links**

Place a Call from a Locked Phone on page 26
Answer a Call on a Locked Phone on page 29

## Lock the Phone

When you lock the system, you can choose to enable one of the following options:

- Allowing ringing when locked—incoming calls ring on the system, and you can answer calls by entering a user password.

  If you set up the system to allow you to answer incoming calls when locked, you can answer calls by entering your user password.
- DND when locked—Do Not Disturb applies to all lines and the system does not ring for incoming calls.

**Procedure**

1. Navigate to **Settings** > **Basic** > **Lock Phone**.
2. On the Lock Phone screen, select a setting.
3. Select **Lock**.

## Unlock the Phone

Your system administrator provides you with a user password that you can use to unlock Poly Trio systems.

**Procedure**

1. Select **Unlock**.
2. Enter your user password, or guest PIN if signed in as a guest on a host phone, and select **Unlock**.

## Change Your User Password

You can change your user password at any time from the Advanced settings menu on Poly Trio.

The Advanced settings menu requires a password to access the menu options. Ask your system administrator for the password if you cannot access menu.

**Procedure**

1. Navigate to **Settings** > **Advanced**.
2. Enter your user password and select **Enter**.
3. On the **Advanced** screen, select **Change User Password**.
4. On the **Change User Password** screen, enter your old and new user password and select **Enter**.

# Audio Calls

**Topics:**


- Placing Audio Calls
- Redial a Number
- Answering Audio Calls
- Decline an Incoming Call
- End an Audio Call
- Holding and Resuming Calls
- Transferring Calls
- Forwarding Incoming Calls to a Contact
- Rejecting Calls with Do Not Disturb
- Managing Multiple Calls
- Mute the Microphones
- Unmute the Microphone


By default, the Poly Trio system has one registered line. You can manage a maximum of 12 active, incoming, or held audio calls at a time on the line. However, you can have only one active call in progress with numerous other incoming calls or calls on hold.

## Placing Audio Calls

You can place calls on Poly Trio in numerous ways, including local and international calls, calls from Recent Calls or directories, calls to contacts or favorites, or calls to authorized numbers on a locked phone.

### Place an Audio Call

You can call a contact using a number or IP address using the dialpad or onscreen keyboard.

**Procedure**

1. Select **Place a Call**.

   On the Poly Trio 8300 system, select **New Call** or simply begin dialing a number on the dial pad.
2. Enter your contact's number, or select the onscreen keyboard and enter an IP address.

   On the Poly Trio 8300 system, use the softkey function in the dial screen to set whether the number is a **Number** or a **URL**.
3. Select **Dial** .

**Related Links**

Place a Video Call on page 42

## Place an International Call

You can place calls to international phone numbers on Poly Trio.

**Procedure**

1. On the dial pad, quickly press the **star key *** twice.

   A plus sign + is displayed.
2. Enter the phone number with the country code and select **Dial** .

   The phone plays a tone and the call is answered automatically on the contact's phone.

## Place a Call from Recent Calls

You can place calls to contacts from the Recent Calls list, which contains calls that were recently placed, answered, or missed.

**Procedure**

1. Do one of the following:
   - From the Home screen, select **Recent Calls** .
   - From the Place a Call screen, select **Recent Calls** .
2. Select a contact.

   The call is placed automatically after you select a contact.

**Related Links**

Recent Calls on page 58

## Call a Favorite

Contacts you add as favorites display at the bottom of the Home screen with an avatar. You can place a call to favorites by selecting a favorite's avatar on the Home screen.

**Procedure**

» On the Home screen, tap a favorite.

  The call is placed to the favorite automatically.

## Place a Call over Bluetooth

When a Poly Trio system is paired and connected with a Bluetooth-enabled mobile phone or tablet, you can place a call on your device and use the system as a speakerphone for the call.

**Procedure**

1. Connect your device with the system over Bluetooth.
2. On your device, place a call to a contact and select **Poly Trio** as your audio source.

**Related Links**

Connecting Devices using Bluetooth on page 66

# Calling Contacts from the Directory

## Call a Contact from a Directory

You can place a call to a contact directly from your directory or you can select contacts in your directory to call from the Place a Call screen.

**Procedure**

1. Do one of the following:
   - Navigate to **Contacts** and select a directory.
   - Navigate to **Place a Call**, select **Contacts** , and select a directory.
2. Select a contact.
3. From the Details screen, select **Call** next to the number you want to call.

## Call a Contact from a Directory Search

You can search for and call contacts from the Search screen in your directory.

**Procedure**

1. Select **Contacts** and select a directory.
2. In the Search field, enter your contact's name.

   Results matching your search display automatically.
3. Select a contact.
4. From the Details screen, select **Call** next to the number you want to call.

# Place a Call from a Locked Phone

When the phone is locked, you can place outgoing calls only to emergency numbers, such as 911 and authorized numbers that your system administrator can set up. You cannot call any other numbers from a locked phone.

**Procedure**

1. Select **New Call**.
2. From the **Place an Authorized Call** screen, select a number and select **Dial**.

**Related Links**

Locking Poly Trio on page 22

# Placing Intercom Calls

The Intercom feature enables you to place a call to a contact that is answered automatically on the contact's phone as long as the contact is not in an active call.

If the contact is in an active call, the contact can choose to answer the intercom call, or the intercom call is answered automatically after the active call ends.

Check with your system administrator to find out if this feature is available on your phone.

**Related Links**

Answer an Intercom Call on page 29

### Place an Intercom Call

You can place an intercom call from Poly Trio to quickly relay a message to a contact.

---

**Tip:** Your system administrator can set up your phone to automatically call a specific contact when you select **Intercom**. If your phone is set up this way, select **Intercom** and wait for your contact to answer before speaking your message.

---

**Procedure**

1. Select **Intercom**.
2. Enter a number or select a contact.
3. Select **Dial** .

   The phone plays a tone and the call is answered automatically on the contact's phone.
4. After the call is answered, speak your message then select **Hang Up** .

### Place an Intercom Call During a Call

You can place an intercom call to another contact during an active call.

**Procedure**

1. Select **Hold** > **Intercom**.

   The active call is placed on hold and the dialpad is displayed.
2. Enter a number or select a contact.
3. Select **Dial** .

   The phone plays a tone and the call is answered automatically on the contact's phone.
4. After the call is answered, speak your message and select **Hang Up** .
5. Select **Resume** .

## Redial a Number

automatically keep a record of all calls placed. You can recall the last contact you called using Redial, if enabled by your system administrator.

**Procedure**

» Do one of the following:
   - Select **Redial**.
   - Select **Place a Call** > **Recent Calls** , and select the first number in the list.

# Answering Audio Calls

When you receive an incoming call on a Poly Trio, you can choose to answer the call in various ways, including answering calls automatically, in the Incoming Calls screen, in the Calls screen, and during a call.

## Answer an Incoming Call

When you receive an incoming call, the phone rings and an Incoming Call screen is displayed. In the Incoming Call screen, you can choose to answer or reject the incoming call.

**Figure 8: Incoming Call screen**

---

**Note:** Your system administrator can enable the screen to flash bright orange when you have an incoming call. The screen continues to flash until the Home or Calls screen displays the incoming call. For more information about this feature, contact your system administrator.

---

**Procedure**

» Select **Answer** .

If enabled, you can also answer calls with **Mute** buttons.

**Related Links**

Decline an Incoming Call on page 30

## Answer a Call When in a Call

When you're in an active call and an incoming call arrives on the same or a different line, a call waiting tone beeps, and the Incoming Call screen is displayed.

**Procedure**

» Select **Answer**.

This places the active call on hold, and the incoming call becomes active.

## Answer Calls Automatically

You can set up Poly Trio to automatically answer calls using the Auto Answer feature.

When enabled, the phone automatically answers all incoming calls using the speakerphone. Your system administrator sets how many times the phone rings before the call is automatically answered.

When Auto Answer is enabled and you receive an incoming call while in a call, the incoming call is not answered until you end or hold the current call.

**Procedure**

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Auto Answer**.
3. Select **Auto Answer SIP Calls** and select **Yes**.
4. Select **Microphone Mute** and choose **Yes** (the default setting) to mute the microphone for auto-answered calls.
5. Select **Video Mute** and select **Yes** to mute the video when video calls are auto-answered.
6. Select **Save**.

**Related Links**

Features for Vision-Impaired and Blind Users on page 79
Features for Mobility-Impaired Users on page 79

## Answer a Call on a Locked Phone

When you set up your phone to accept incoming calls when it is locked, you can answer the calls by entering a user password.

**Procedure**

1. On the Incoming Call screen, select **Answer**.
2. Enter your user password and select **Enter**.

   The call connects.

**Related Links**

Locking Poly Trio on page 22

## Answer an Intercom Call

When you receive an intercom call, the call is answered automatically using the speakerphone.

If the phone is set up to answer intercom calls with your microphone muted, you need to unmute your microphone before responding to the call.

**Procedure**

» After the call is answered, press **Mute** and reply.

**Related Links**

Placing Intercom Calls on page 26

# Decline an Incoming Call

You can decline an incoming call and send the call directly to voicemail.

Declined calls display in the Missed Calls list in Recent Calls. You cannot reject calls for shared lines.

**Procedure**

» In the **Incoming Call** screen, select **Decline**.

**Related Links**

Answer an Incoming Call on page 28

# End an Audio Call

You can end active calls at any time, however, you must resume held calls before you can end a call.

**Procedure**

» Do one of the following:

- Select **Hang Up**.
- On the Calls screen, select the call and select **Hang Up**.
- On the Calls screen, select a held call, select **Resume**, and select **Hang Up**.

# Holding and Resuming Calls

When you are in a call, you can place an active audio call on hold and resume the call.

When you place a call on hold, the Mute key indicators on the system and microphones are red. When you are placed on hold, the Mute key indicators on the system and microphones flash green.

## Hold a Call

You can place any active call on hold on Poly Trio.

**Procedure**

» During an active call, select **Hold**.

If you're in the Calls screen, select the call first.

The Resume icon is displayed.

## Resume a Call

You can view and resume all held calls on the phone.

**Procedure**

» Do one of the following:

- Select **Resume**.
- From the Calls screen, select the call and select **Resume**.

# Transferring Calls

You can transfer active or held calls to another person using the following transfer types:

- Blind transfer—Transfers the call directly to another line without speaking with the other party first.
- Consultative transfer—Enables you to speak with the other party before completing the transfer.

## Choose a Default Transfer Type

You can choose a default transfer type to use for all calls on Poly Trio.

When you choose a default transfer type, the phone uses the selected transfer type for all calls. Consultative is the default transfer type.

**Procedure**

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Default Transfer Type** and choose a transfer type.

   The selected transfer type is used for all calls.

## Transfer a Call

How you transfer a call varies depending on the default transfer type.

**Procedure**

» During a call, do one of the following:

- When the default type is Blind, select **Transfer** and dial a number or select a contact from Recent Calls or Contacts.
- When the default type is Consultative, select **Menu** ≡ and select **Transfer**. Dial a number or select a contact from Recent Calls or Contacts.

The call is transferred automatically.

## Transfer a Call using Consultative Transfer

How you transfer a call using Consultative Transfer varies depending on the default transfer type set on the phone.

**Procedure**

» During a call, do one of the following:

- If the default type is Consultative, select **Consult** and dial a number or select a contact from Recent Calls or Contacts. Select **Complete Transfer** after speaking with the contact.
- If the default type is Blind, select **Menu** ≡ and select **Consult**. Dial a number or select a contact from Recent Calls or Contacts and select **Complete Transfer** after speaking with the contact.

## Cancel a Transfer

If a contact does not answer the transfer or you want to remain speaking with the contact on your line, you can cancel the transfer before it is complete.

**Procedure**

» Select **Cancel**.

The call is not transferred and becomes active.

# Forwarding Incoming Calls to a Contact

You can choose to forward an incoming call to a contact or forward all incoming calls to one of your contacts.

## Forward an Incoming Call to a Contact

You can forward an incoming call directly to a contact without answering the call.

You cannot forward calls without answering on shared lines.

**Procedure**

1. In the **Incoming Call** screen, select **Menu** ≡ and select **Forward**.
2. From the **Call Forwarding** screen, enter the forwarding number, and select **Forward**.

## Forward All Incoming Calls to a Contact

You can set up your phone to forward all incoming calls to a contact using one of the following forwarding types:

- Always—Forwards all incoming calls.
- No Answer—Forwards all unanswered incoming calls.
- Busy—Forwards incoming calls when you're in a call.

For shared lines, you can only choose Always as your forwarding type; the other forwarding options are not available for shared lines.

**Procedure**

1. Select **Forward** or navigate to **Settings** > **Features** > **Forward**.
2. On the **Forwarding Type Select** screen, select a forwarding type.
3. Enter a contact's number or IP address, if enabled, and select **Enable**.
4. If you selected the **No Answer** option, enter the number of rings before the call is forwarded.

   The forwarding number or name of the contact you chose scrolls in the status bar. When you select **Always** as your forwarding option, the Forwarding icon is displayed on the line.

## Disable Call Forwarding

You can disable call forwarding when you no longer want to forward your calls.

**Procedure**

1. Navigate to **Settings** > **Features** > **Forward**.
2. On the **Forwarding Type Select** screen, select **Disable Call Forwarding**.

# Rejecting Calls with Do Not Disturb

Do Not Disturb (DND) enables you to set your phone to automatically reject calls when you don't want to be interrupted.

When you enable DND, you see the following:

- The DND icon displays in the status bar.
- When the phone is idle, the DND icon displays next to your phone line.
- When the administrator enables hybrid line registration on the phone, you can choose **All** to enable DND on all the registered lines.
- If you have new messages or you have enabled call forwarding, the messages or forwarding icon display instead of the DND icon.

---

**Note:** When you set your presence status to Do Not Disturb and enable DND on your phone, a message stating that your status is set to Do Not Disturb scrolls under the time display, and the DND icon does not display in the status bar.

---

## Enable Do Not Disturb

You can enable DND to prevent your phone from ringing and to send all incoming calls directly to voicemail. All calls you receive while DND is enabled are logged in the Recent Calls list.

Enabling DND on shared lines disables ringing only. A visual notification of the call still displays, and you have the option to answer or ignore the call.

**Procedure**

» Do one of the following:
  - Select **DND** on the Home screen, if enabled by your system administrator.
  - Navigate to **Settings** > **Features** > **Do Not Disturb**, and select **Enable**.

## Disable Do Not Disturb

You can disable DND when you are ready to resume receiving calls again.

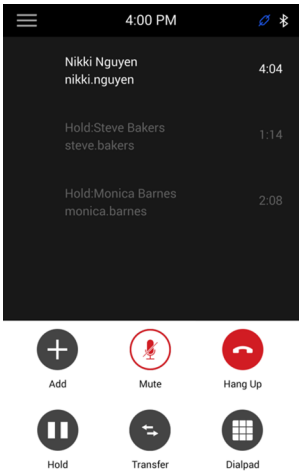
**Procedure**

» Navigate to **Settings** > **Features** > **Do Not Disturb** and select **Disable**.

# Managing Multiple Calls

You can manage multiple calls that are active, incoming, or held on the phone.

In the Calls screen, you can view active and held calls, including conference calls. The following figure shows an active call and a held call.




## Manage a Call from the Calls Screen

From the Calls screen, you can manage a call by holding, resuming, or transferring the call.

**Procedure**

1. Select a call.
2. Do one of the following:
   - Select **Hold** to place an active call on hold.
   - Select **Resume** to make a held call active.
   - Select **End Call** to end a call with a contact. You can end active calls only, so resume the held call first before ending it.
   - Select **Transfer** to send the call to another contact.

# Mute the Microphones

You can mute the microphone so other parties cannot hear you.

**Procedure**

» Do one of the following:
   - Select **Mute** .
   - Select the Mute key on the system.
   - Select the Mute key on the microphone.

# Unmute the Microphone

Unmute your audio when you are ready to speak and let your contacts hear you.

**Procedure**

» Do one of the following:
   - Select **Unmute** .

- Select the Mute key on the system.
- Select the Mute key on the microphone.

# Conference Calls

**Topics:**


- Tips for Conference Calls
- Initiating Conference Call
- Add Participants to a Conference Call
- End a Conference Call
- Hold a Conference Call
- Resume a Conference Call
- Mute a Conference Participant
- Remove a Conference Participant


You can initiate and manage up to 12 audio conference calls on a Poly Trio system and place video conference calls and view video streams for video-enabled participants.

## Tips for Conference Calls

When you are in a conference call, follow these tips:

- Mute your microphone when you are not speaking, especially in noisy environments.
- Avoid tapping or rustling papers near the microphone.
- Speak in your normal voice without shouting.

## Initiating Conference Call

You can initiate a conference call with up to four contacts, and you can hold, resume, or split a conference call.

While the system can manage up to 12 conference calls, you can have only one active conference call in progress with numerous other conference calls on hold.

If your system administrator enables the Conference Management feature on your phone, you can manage each participant in the call. With the Conference Management feature, you can mute, hold, and remove individual participants in a conference call.

### Initiate a Conference Call

You can initiate a conference by adding a contact during an active call and joining the contacts into a conference call.

**Procedure**

1. Call a contact.
2. After the contact answers, select **Add** ＋.

   On the Poly Trio 8300 systems, select **Confrnc**.

3. Enter another contact's number or select a contact from Contacts or Recent Calls.

   The contact is added to the conference call after answering.

### Merge Calls into a Conference Call

You can merge an active call and a held call to initiate a conference call.

**Procedure**

1. In the Calls screen, tap a held call.
2. Select **Merge** .

   The held call is merged with the active call and a conference call is initiated.

## Add Participants to a Conference Call

You can add up to four contacts to a conference call.

**Procedure**

1. During a conference call, select **Add Participants**.

   On Poly Trio 8300 systems, select **Invite**.
2. Enter a contact's number or select a contact from Contacts or Recent Calls and select **Dial**.

   The contact is added to the call after answering.

## End a Conference Call

By default, when you end a conference call, your connection to the call ends and the other participants in the conference remain in the call.

However, your system administrator can set up your phone so that all connections terminate when you end a conference call.

**Procedure**

» During a conference call, select **Hang Up** .

## Hold a Conference Call

When you place a conference call on hold, you place all conference participants on hold.

**Procedure**

» Select **Hold** .

## Resume a Conference Call

Resuming a held conference call enables all participants to hear the audio of everyone on the call.

**Procedure**

» Select **Resume.**

# Mute a Conference Participant

If your system administrator has enabled the Conference Management feature, you can mute individual participants in a conference call.

**Procedure**

1. During a conference call, select a participant.
2. Select **Mute** .

   The muted participant can hear everyone, but no one can hear the muted participant.

# Remove a Conference Participant

If your system administrator has enabled the Conference Management feature, you can remove individual participants from a conference call.

**Procedure**

1. During a conference call, select a conference participant.
2. Select **Hang Up** .

   The participant is removed from the conference call.

# Video Calls on Poly Trio Systems

**Topics:**


- Tips for Video Calls
- Video Call Settings
- Place a Video Call
- Stop Sending Video
- Start Video During an Audio Call
- Adjust the Camera Position During a Call
- Adjust Video Quality
- Adjust Camera Tracking Settings
- Switch Between Video and Content during Video Calls
- Handling a Mixture of Audio and Video Calls
- Camera Presets on Poly Trio Systems


When your Poly Trio system is paired with a Poly Trio Visual+, Trio VisualPro, or RealPresence Group Series system, you can send and receive video.

Poly Trio system support for the Poly Trio Visual+ and VisualPro systems varies by model:

- You can pair any Poly Trio system with a Poly Trio Visual+ system.
- You can pair a Poly Trio 8500 or Poly Trio 8800 system with a Poly Trio Visual+ or VisualPro system. The Poly Trio 8300 system does not support the Trio VisualPro system.

Poly Trio systems support the following cameras when paired with a Poly Trio Visual+:

- Polycom® EagleEye™ Mini USB camera
- Polycom® EagleEye™ IV USB camera
- Polycom® EagleEye™ Cube USB camera
- Polycom Studio camera
- Logitech C930e webcam

Poly Trio systems support the following cameras when paired with a Trio VisualPro or RealPresence Group Series system:

- Polycom® EagleEye™ IV camera
- Polycom® EagleEye™ Director II camera
- Polycom® EagleEye™ Producer camera
- Polycom® EagleEye™ Acoustic camera

If you do not have a camera connected to your paired device when you receive video during calls, you can see your contact's video but they cannot see video from you.

**Related Information**

# Tips for Video Calls

Use these tips when you're in a video call:

- Check your video image to make sure it's clear, bright, and sharp.
- Avoid bright lights or windows behind you. If the camera faces a window or bright lights, adjust the camera settings.
- Avoid wearing bright colors, all-light or all-dark clothing, or busy patterns, such as small checks or narrow stripes. Pastels and muted colors look best on the screen.
- Use natural gestures and speak in a natural tone without shouting.
- Pause between sentences to allow for possible audio delay.
- During a conference call, mute your microphone when not speaking.
- Avoid tapping or rustling papers near the microphone.

# Video Call Settings

You can update video settings to change the way video calls display on your Poly Trio system. Note that if you update settings during a call, the new settings apply to the next call and not the current call.

---

**Note:** Some of the features described in this section require access to the Basic settings menu. If your phone requires a password to access the Basic settings menu, contact your system administrator for assistance.

---

## Set the Call Rate for Video Calls

You can set the maximum call rate to use for a video call and the selected call rate applies to your next video call.

Your system administrator can set a maximum call rate for video calls, and you cannot select a call rate above this limit. You can choose a call rate between 128 kbps and 768 kbps. The default setting is 512 kbps.

**Procedure**

1. Navigate to **Settings** > **Basic** > **Call Rate**.
2. From the **Call Rate** screen, select the maximum call rate you want to use for video calls.

## Change Video Clarity

You can change the Target Frame Rate to improve video clarity.

The Target Frame Rate sets how smoothly your video displays. You can set a rate between 5 (least smooth) and 30 (smoothest). The default rate is 30.

**Procedure**

1. Go to **Settings** > **Basic** > **Video**.
2. Select **Camera Settings** > **Target Frame Rate** and select **Up** or **Down** to adjust the frame rate.

## Set Video and Content Layout - Single Monitor

You can choose how participant video and content display on the monitor before or during a video call.

**Procedure**

1. Select one of the following options:
   - If you're not in a call, on the Poly Trio Home screen, tap Menu ≡ and **Layout**.
   - If you're in a call, tap **Layout** on the Calls screen.
2. Select one layout option:
   - Auto (default)—The system chooses the best layout for the call.
   - Gallery View—Up to five meeting participants display. If content displays when the maximum number of participants is active, the content replaces one participant. When there are fewer than five participants, self-view displays.
   - Picture-in-Picture—Only self-view or the active speaker display. The PIP displays in or on the meeting content.
   - Fullscreen—The video of the active speaker or the meeting content displays in full screen.

## Set Video and Content Layout - Multiple Monitors

You can choose how video and content display when using two or more monitors before or during a video call.

The number of layout options available to you and the combinations you can choose vary with the number of monitors connected to the Poly Trio system and depend on how your administrator configures the default layout.

If you are using two or more monitors, you can configure which screen(s) to show content on. For example, if using two monitors, you can configure content to show on one or both monitors. If you are using three monitors, you can configure content to show on one monitor, a combination of two monitors, or all three monitors.

**Procedure**

1. Select one of the following options:
   - If you're not in a call, on the Poly Trio Home screen, tap Menu ≡ and **Layout**.
   - If you're in a call, tap **Layout** on the Calls screen.
2. Select one or more monitors to display video and content on:
   - Display 1
   - Display 2
   - Display 3

## Change How Far-End Video Displays

You can adjust video settings to control the appearance of video received from the far-end.

You can adjust the appearance of the far-side video so that it displays as one of the following:

- **Normal**—The video image displays with correct proportions. Black bars appear on the top, bottom, or sides of the area to maintain the correct aspect ratio if the aspect ratio of the received video does not match the display area. The portions of the video that are not being received display as black bars.

- **Full**—If the received video image is not the same aspect ratio as the display area, the video image is stretched to fill the area. If the aspect ratios match, no stretching occurs.
- **Crop**—The video image is resized to maintain the correct aspect ratio. Any parts of the image that do not fit within the display area are cropped.

**Procedure**

1. Go to **Settings** > **Basic** > **Video**.
2. Select **Video Screen Mode** and select a video screen setting.
3. Select **Save**.

# Place a Video Call

Depending on how the system is set up by your administrator, you can place a video call to one contact or add video during an audio call.

When the system is registered with the Skype for Business Server, you can place a video call to your Skype for Business contacts. Video displays automatically for up to six contacts, as long as those contacts have video enabled and are streaming video.

**Procedure**

1. Select **Place a Call**.
2. Enter a contact's number or select a contact from Contacts or Recent Calls.
3. Select **Dial** .
4. In the Call screen, select **Start Video**, if video does not display automatically.

**Related Links**

Place an Audio Call on page 24

# Stop Sending Video

You can stop transmitting video at any time during a call.

Stopping video does not create an audio-only call. Even if you stop video, video information is still transmitted to the far-end and you are still in a video call. When you stop video, the stopped video icon is displayed and the far-side cannot see you.

---

**Note:** You can't start and stop far-end video. If the phone is set up to receive far-side video, the far-end video always displays.

---

**Procedure**

» In the Call screen, select **Stop My Video**.

# Start Video During an Audio Call

You can start sending video at any point during an audio-only call if a camera is connected to the phone.

After you start sending video, you can mute your video, but you cannot stop sending video and return to an audio-only call.

**Procedure**

» In the Call screen, select **Start My Video**.

# Adjust the Camera Position During a Call

You can control the position of a Poly camera during or before a video call.

**Procedure**

1. Do one of the following:
   - During a call, select **Camera** .
   - Select **Menu** ≡ and select **Camera**.
2. Select **Near** to adjust your camera or **Far** to adjust a call participant's camera.
3. Do one of the following:
   - Use the onscreen arrows to adjust the camera position.
   - Drag your finger across the onscreen video stream to adjust the camera position.
   - Select the onscreen video stream to move the camera to that position.
   - Select the plus sign to zoom the camera in or select the minus sign to zoom the camera out.
   - Move the slider to zoom the camera in or out.

# Adjust Video Quality

You can adjust camera settings on your Poly Trio system to improve video quality.

**Procedure**

1. Do one of the following:
   - During a call, select **Camera** .
   - Select **Menu** ≡ and select **Camera**.
2. Select **Settings** to access **Camera Preferences**.
3. Adjust or toggle the following camera settings:
   - Brightness
   - White balance
   - Saturation
   - Sharpness
   - Backlight compensation

# Adjust Camera Tracking Settings

You can modify the camera tracking settings on your Poly Trio system. When tracking is enabled, for example, your camera can automatically frame the active speaker.

Tracking is available only with the following cameras:

- Polycom® EagleEye™ Director II camera

- Polycom® EagleEye™ Producer camera
- Polycom® EagleEye™ Cube USB camera
- Polycom® EagleEye™ Cube HDCI camera

**Procedure**

1. Do one of the following:
   - During a call, select **Camera** .
   - Select **Menu** ≡ and select **Camera**.
2. Select **Settings** to access **Camera Preferences**.
3. Do one of the following:
   - Turn camera tracking on or off.
   - Select a **Tracking Mode**: Frame Speaker, Frame Group, or Frame Group with Transition (last option is available only with an EagleEye Producer camera).
   - Adjust the **Tracking Speed**.
   - Adjust the **Framing Size**.

# Switch Between Video and Content during Video Calls

By default, when you or a video participant starts sharing content during a video call on Poly Trio systems, the content automatically displays in place of participant video streams during the call. You can choose to display the video streams for participants or display any content being shared.

---

**Note:** You cannot hide content that is shared using Apple AirPlay. If you try to hide content, depending on how the content is shared and the type of call, a message displays stating that you cannot hide content and must stop the content instead.

---

**Procedure**

» In the Calls screen, select **Toggle People/Content**.

# Handling a Mixture of Audio and Video Calls

When you are in a call with a person who has a video-enabled phone or video-conferencing system, the participants' video displays on the connected monitor. For video calls with audio-only contacts, only your video stream displays on the monitor, and an Audio icon displays on the monitor with the number of contacts on audio.

When you do not have a camera connected to your paired content and video accessory (e.g., Poly Trio Visual+ or Trio VisualPro), you can receive video but cannot send video. Video always displays when a contact can send video and the system is enabled to receive video.

# Camera Presets on Poly Trio Systems

You can store and modify camera presets on a Poly Trio system with a connected Poly camera.

Presets aren’t supported with the Logitech Webcam C930e camera.

Camera presets are stored camera positions that you can create before or during a call. Presets enable you to quickly point a camera at pre-defined locations in a room and persist until you change them. The system uses preset 0 as the default camera position for all preset camera positions. This default camera position is zoomed out, panned straight ahead with horizontal tilt.

If your system camera supports pan, tilt, and zoom movement, you can create up to 10 preset camera positions for the near-end camera. Each preset stores the following information:

- Camera number
- Camera zoom level
- Camera direction
- Snapshot of the camera view

## Store Camera Presets

You can store camera presets during a call or when the Poly Trio system is idle with a connected Poly camera.

**Procedure**

1. Do one of the following:
   - During a call, select **Camera** .
   - Select **Menu** ≡ and select **Camera**.
   - On the Home screen, select **Camera**.
2. Adjust the camera to your desired position and zoom level.
3. Select **Presets**.

   The available and stored preset positions display.
4. Press and hold a preset position numbered 0 to 9.

   The new position displays immediately.

## Rename Stored Camera Presets

By default, presets are named in the order they are set, starting with "Preset 1". You can rename stored presets with a name that identifies the camera position or zoom level.

**Procedure**

1. Go to **Settings** > **Basic** > **Video**.
2. Select **Camera Settings**.
3. Select **Presets**.

   The available and stored preset positions display.
4. Select **Edit** .
5. Select a preset and edit the name of the preset.

# Recording Audio Calls

**Topics:**


- Guidelines when Recording Calls
- Record a Call
- Pause a Recording
- Resume a Recording
- Stop Recording
- Browse Recorded Calls
- Play a Recorded Call
- Pause and Resume Played Recordings
- Stop Playing a Recording
- Rename a Recording
- Delete a Recording


You can connect a USB flash drive to a Poly Trio system and record audio calls onto the drive.

Recordings are stored as .wav files on the USB flash drive, and you can record up to four hours in one file. You can replay recordings on the system or on a computer.

For a list of supported USB flash drives to record phone audio, see *Technical Bulletin 38084: Supported USB Devices* on Polycom Support.

---

**Note:** If your phone doesn't detect the USB device when you insert it into the USB port, the USB port on your phone may be disabled. Contact your system administrator for assistance using the USB port.

---

## Guidelines when Recording Calls

The following is a list of guidelines to follow when recording audio calls:

- Inform contacts when you are recording a call.
- Make sure you mute your audio when you are placed on hold while recording the call. When you place a call on hold while recording, the recording pauses. However, when another person places you on hold, the recording continues.
- During an active call, pause your recording before answering incoming calls. All incoming calls you answer after you start recording are also recorded in the same file. For example, on June 22, 2012, at 11:22 a.m., you answer a call from person A. During your call with person A, you answer calls from person B and person C. All three calls are recorded in the same file.

# Record a Call

You can record all active audio calls on the phone.

You cannot record calls when there are no connected calls, when you place a new call to transfer a call or initiate a conference, or when you have an incoming call. Make sure to inform your contacts on the call before you begin recording.

Note that some tones made on your contact's phone are recorded. When you mute the microphone while recording, your audio is muted and only other participants' audio in the call is recorded.

**Procedure**

» During an active call, select **Menu** ≡ and select **Start Recording** ◉ .

The recording icon displays at the top of the Call screen.

# Pause a Recording

During a call, you can pause a recording while the call is active.

**Procedure**

» Select **Menu** ≡ and select **Pause Recording** ⏸.

The pause recording icon displays at the top of the Call screen.

# Resume a Recording

After you pause and then resume recording, recording continues in the same file.

**Procedure**

» Select **Menu** ≡ and select **Resume Recording** ▶ .

# Stop Recording

You can stop recording a call before the call ends. The recording also stops when the active call ends, no matter who ended the call.

---

**Caution:** Do not remove the USB flash drive while recording. The file being recorded will be incomplete and cannot be played back later. Removing the USB flash drive while recording can also damage the flash drive.

---

**Procedure**

» Do one of the following:

- Select **Menu** ≡ and select **Stop Recording** ■ .
- Select **Hang Up**.

When you stop recording, the USB icon is displayed in the status bar.

# Browse Recorded Calls

You can browse recorded files stored on the USB drive connected to supported Poly Trio .

**Procedure**

» Go to **Settings** > **Features** > **Removable Storage Media** > **Browse Recordings**.

A list of recordings display.

# Play a Recorded Call

You can play back calls that you recorded on a USB drive connected to Poly Trio .

---

**Note:** You cannot open and play recordings when you are in an active call or if you're recording a call. If you try to, a message indicating that the action was canceled is displayed. Place the call on hold before playing the recordings. The recording stops playing when you resume the call.

---

**Procedure**

1. Go to **Settings** > **Features** > **Removable Storage Media** > **Browse Recordings**.

   A list of recordings display.
2. Select a recording.
3. Select **Open** > **Play**.

   The length of the recording and a progress bar is displayed as the recording plays.

# Pause and Resume Played Recordings

While playing a recording, you can pause the recording, perform another task on the phone, and resume the recording at any time.

When you receive an incoming call while playing a recording, the recording is paused automatically. If you do not answer or reject the incoming call, the recording remains paused until you select Resume.

**Procedure**

1. While the recording plays, select **Pause**.
2. Select **Resume** to continue playing the recording.

# Stop Playing a Recording

When you are finished listening to a recording, you can stop playing it by exiting the recording.

**Procedure**

» Select **Exit**.

# Rename a Recording

By default, recordings are labeled with the date of the recording. You can rename recordings to provide them with more meaningful names.

**Procedure**

1. Go to **Settings** > **Features** > **Removable Storage Media** > **Browse Recordings**.

   A list of recordings display.
2. Select a recording.
3. Select **Rename**, update the file name, and select **OK**.

# Delete a Recording

When you have played a recording or need additional space on your USB drive, you can delete recordings from the phone.

**Procedure**

1. Go to **Settings** > **Features** > **Removable Storage Media** > **Browse Recordings**.

   A list of recordings display.
2. Select a recording.
3. Select **Delete**.

# Sharing Content on Poly Trio Systems

**Topics:**


- Sharing Content with RealPresence Desktop or Mobile
- Sharing Content with the Polycom Content Application
- Sharing Content with People+Content IP
- Sharing Content from an Apple Device
- Sharing Content from a Windows or Android Device
- Share Content with an HDMI or VGA Connection
- Share Content Automatically When Idle
- Share Content using the Polycom Content Application


You can share content in and out of calls when your Poly Trio system is paired with a Poly Trio Visual+, Trio VisualPro, or RealPresence Group Series system.

You can use the following applications to share content:

- Polycom® RealPresence® Desktop
- Polycom® RealPresence® Mobile for Tablets
- Polycom® People+Content IP™
- Apple® AirPlay® (Poly Trio 8800 system only)
- Google Miracast® (Poly Trio 8800 system only)

You also can share content by connecting a device, such as a laptop, to a paired Trio VisualPro or RealPresence Group Series system with an HDMI or VGA cable.

## Sharing Content with RealPresence Desktop or Mobile

To share content during a call, you can use RealPresence Desktop on your laptop or RealPresence Mobile on your tablet. If you do not have either application, you can download RealPresence Desktop onto your laptop from the RealPresence Desktop Support page or download RealPresence Mobile from your tablet's application store.

Using RealPresence Desktop on your laptop, you can choose to share your monitor or share an open application.

Using RealPresence Mobile on your tablet, you can choose to share content from local documents, photos, a website, or Dropbox. You can also choose to share annotations you make on the Whiteboard or Blackboard application within RealPresence Mobile.

# Sharing Content with the Polycom® Content Application

You can connect the Poly Trio system to the Polycom® Content application to share content during a meeting.

For more information on downloading and using the Content application, refer to the *Polycom Content Application User Guide* on Polycom Support.

# Sharing Content with People+Content IP

The People+Content IP application enables you to send content from a computer using the system's IP address.

Keep the following points in mind about People+Content IP:

- While People+Content IP supports any computer desktop resolution, video streamed to the system will be scaled to either 720p or 1080p.
- People+Content IP provides video-only content. No audio is shared.

## Download and Install Polycom® People+Content™ Technology

You need to download and install the Polycom® People+Content™ technology on a computer before you can use it to show content.

**Procedure**

1. On a computer, go to the Polycom People+Content IP page.
2. Download the People+Content IP software for Mac or PC.
3. Open the zip file and click the application installation.
4. Follow the instructions in the installation wizard.

## Share Content using People+Content IP

After you download and install People+Content IP, you are ready to share content.

**Procedure**

1. On your computer, do one of the following:
   - On a Windows computer, navigate to **My Computer** and click the **People+Content IP** folder.
   - On a Mac computer, navigate to **Finder** then search for and run the **People+Content IP** application.
2. Enter the IP address or host name of the Poly Trio system and the meeting password, if one is set.
3. Click **Connect**.
4. Open the content you want to show and click **Play** ▶.

## Stop Sharing Content with People+Content IP

When you are done showing content, make sure you stop People+Content IP.

**Procedure**

» Click **Stop** ⊗ in the People+Content IP application.

## Share Content with People+Content IP over USB

You can connect your Windows or Mac computer over USB to the system and show content using the People+Content IP application. Video and data sent using the People+Content IP application is sent over the USB cable and no network connection is required. This is useful for environments where guest IP access is not allowed.

**Procedure**

1. Connect a USB cable from the USB port on the Poly Trio to the USB port on your computer.

   A folder with the People+Content IP application opens automatically.
2. If the application folder does not open automatically, on your computer, do one of the following:
   - On a Windows computer, navigate to **My Computer** and click the People+Content IP folder.
   - On a Mac computer, navigate to **Finder** then search for and run the People+Content IP application.
3. Open the content you want to show, and click **Play** ▶.

# Sharing Content from an Apple Device

If your system administrator has enabled the Screen Mirroring feature on Poly Trio 8800 system, you can share content locally from your Apple® AirPlay®-certified device during in-room meetings. Note that you can share content using AirPlay during calls, but the content will not display for far-end call participants.

In order to share content from your Apple device using AirPlay, your device must be on the same network as the Poly Trio 8800 system. If your device is on a different network than the Poly Trio 8800 system, you can connect to **Poly Trio 8800** with AirPlay using Bluetooth, but the network that the Apple device is on must be able to communicate with the Poly Trio 8800 system's network. Contact your system administrator for additional help connecting with a Poly Trio 8800 system using AirPlay.

The Poly Trio solution supports the following AirPlay-certified Apple devices:

- iPhone®
- iPad®
- iPad Pro™
- MacBook Pro®
- Any other devices that support AirPlay

Sharing content with Poly Trio solutions using AirPlay works similarly to sharing your screen to Apple TV. For more information on using AirPlay, refer to the documentation for your Apple product.

---

**Note:** When you answer an incoming call with content while you're sharing content wirelessly with AirPlay, your content stops showing, and the content with the connected call displays instead. After you end the call, you can start sharing content again locally using AirPlay.

---

# Sharing Content from a Windows or Android Device

If your system administrator has enabled the Screen Mirroring feature on Poly Trio 8800 system, you can share content locally from your Miracast®-certified Android™ or Microsoft® Windows® device during in-room meetings. You cannot share content from your device wirelessly during point-to-point or conference calls.

The Poly Trio solution supports the following Android and Windows devices:

- Microsoft Surface® 3 Pro and Surface 4 Pro
- Samsung Galaxy smartphones and tablets with software Android 4.2 or later.
- Devices with Miracast® support with software 4.2 or later
- Microsoft Windows 10 devices with Miracast support

For more information on sharing content wirelessly, refer to the documentation for your Android or Windows product.

---

**Note:** When you answer an incoming call with content while you're sharing content wirelessly on a Windows or Android device, your content will stop showing, and the content with the connected call displays instead. After you end the call, you can start sharing content again locally from your Windows or Android device.

---

# Share Content with an HDMI or VGA Connection

You can share content from a device that's connected to a paired Trio VisualPro or RealPresence Group Series system with an HDMI or VGA cable.

**Procedure**

1. Connect your device to the paired system with an HDMI or VGA cable.
2. Do one of the following on the phone menu:
   - **Out of a call:** Select **Content** > **Show Content**.
   - **In a call**: Select **Show Content**.

# Share Content Automatically When Idle

You can share content using a Poly Trio VisualPro or RealPresence Group Series system while the Poly Trio system is idle. After you end the call and the Poly Trio system is idle, the content displays automatically.

**Procedure**

1. Connect your device to the Poly Trio VisualPro or RealPresence Group Series system with an HDMI cable.

   The content automatically displays on the monitor when the Poly Trio system is idle.
2. Select **Stop Sharing** to stop sharing the content.

   The content resumes automatically after a period of idle time set by your administrator.

# Share Content using the Polycom Content Application

With the Polycom Content application, you can connect your device to the Poly Trio system with a connected monitor and share content in a video call or during in-room meetings.

**Procedure**

1. In the Polycom Content application, click **Screen Sharing**, and choose one of the following options:
   - Nearby Rooms
   - Recent Rooms
   - Find Other Rooms
2. Optional: If prompted, enter the security code displayed on the connected monitor or select **Menu** ≡ and enter the security code displayed.

# Using the Calendar

**Topics:**


- Open the Calendar
- View Meeting Details
- Meeting Reminders
- Joining Calendar Meetings


When connected to Microsoft Exchange Server, you can view and join meetings scheduled in Microsoft Outlook from Poly Trio or on the monitor connected to a device, such as Poly Trio Visual+, which is paired to your Poly Trio system.

## Open the Calendar

You can access the calendar on to view and join scheduled meetings.

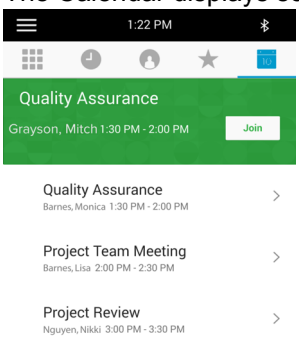
You can view meetings for the current day and upcoming meetings. You cannot view meetings for previous days.

**Procedure**

» On the Home screen, tap **Calendar**.

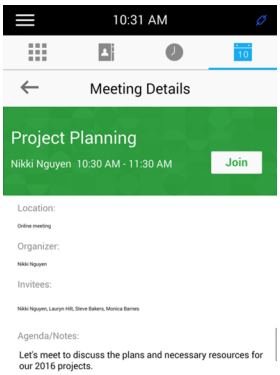
On Poly Trio 8300 systems, access **Calendar** from the main menu.

The Calendar displays scheduled meetings for the day, as shown next.



# View Meeting Details

When you select a meeting on the calendar, you can view the meeting's start and end time, location, organizer, invitees, and meeting description, as shown next.




**Procedure**

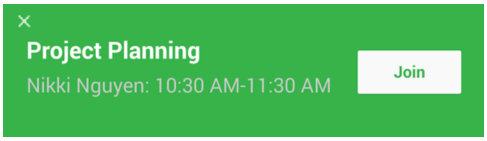
» On the calendar, select a meeting.

# Meeting Reminders

When you have a scheduled meeting on the calendar, a meeting reminder displays and an alert tone plays 5 minutes and 1 minute before a meeting starts.

From the meeting reminder, you can view meeting details and join the meeting. The following figure shows a meeting reminder that displays before a meeting starts.

**Figure 9: Meeting Reminder**




---

**Note:** If you have enabled meeting reminders but the reminders do not display before meetings, make sure that your login credentials are correct.

---

## Choose a Meeting Reminder Type

You can choose a meeting reminder type that determines if an alert tone plays each time a meeting reminder displays.

The following options are available for meeting reminders:

- Silent—The meeting reminder displays without an alert tone.
- Audible Once—An alert tone plays the first time a meeting reminder displays but does not play for any additional reminders.
- Audible Always (default)—An alert tone plays each time a meeting reminder displays.

**Procedure**

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Calendar Settings** > **Reminder Settings**.
3. Select **Reminder Type** and choose a meeting reminder type.

## Choose a Meeting Alert Tone

You can choose the alert tone that plays for meeting reminders.

**Procedure**

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Calendar Settings** > **Alert Tone**.
3. Choose an alert tone and select **Play** to hear the tone.

## Disable Meeting Reminders

Meeting reminders are enabled by default and display reminders for all meetings. You can choose to disable meeting reminders so they do not display for any meetings.

**Procedure**

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Calendar Settings** > **Reminder Settings**.
3. Select **Reminder** > **Disable**.

# Joining Calendar Meetings

You can join any scheduled meeting from the calendar or from a meeting reminder.

## Join a Meeting from the Calendar

You can join meetings from the Calendar or from Meeting Details.

**Procedure**

» Do one of the following:
  - From the Calendar, select **Join**.
  - Select a meeting and select **Join** in the Meeting Details screen.

## Join a Meeting from a Meeting Reminder

You can join a meeting from the meeting reminder when it displays before a meeting, if enabled.

**Procedure**

» Select **Join**.

## Join a Meeting with an Alternate Number

If the meeting organizer has provided alternate numbers you can use to join the meeting, you can view and use alternate numbers to join the meeting.

**Procedure**

1. Select **Join** on the meeting reminder and select **More Actions**.
2. In the **Meeting Details** screen, choose a number.

# Call Lists and Directories

**Topics:**


- Recent Calls
- Local Directory
- Local Directory Favorites
- Corporate Directory
- Searching the BroadSoft Directory


The Poly Trio systems support a Recent Calls list, a Local Directory, and a Corporate Directory.

**Note:** The phone may not support all of the features described in this section. Check with your system administrator to find out which features are available.

## Recent Calls

The Recent Calls list on Poly Trio includes missed, received, and placed calls. Each list holds up to 100 entries.

You can perform the following tasks from the Recent Calls list:

- Remove calls from the list.
- Select a call record to view call details.
- Select a call record to automatically call a contact.

**Related Links**

Place a Call from Recent Calls on page 25

### View Recent Calls

In the Recent Calls list, you can view a list of up to 100 missed, received, and placed call entries.

**Procedure**

» On the Home screen, tap **Recent Calls**.

On the Poly Trio 8300 systems, **Recent Calls** is found in the main menu.

### Edit a Recent Call Entry

You can edit a contact's phone number stored in your Recent Calls list before returning the contact's call.

**Procedure**

1. Tap **Info** ⓘ next to a call entry.

   On Poly Trio 8300 systems, press the **Select** button with the call entry highlighted.
2. Tap **Edit** ✎.

   On Poly Trio 8300 systems, press the **Edit/Dial** soft key.

3. Edit the number then select **Dial**.

## Save a Recent Contact

You can save a recent contact to the Contact Directory.

**Procedure**

1. Next to a call entry, tap **Info** ⓘ.

   On Poly Trio 8300 systems, press the **Select** button with the call entry highlighted.
2. On the Call Details screen, select **Save**.
3. If needed, edit the contact's information.
4. Select **Save**.

## Delete a Recent Call Entry

You can delete any call entry from the Recent Calls list.

If you delete or move call entries on the system, if enabled, the changes are made on the system only. If you delete call entries in the Skype for Business client, the changes are made on the system and in the Skype for Business client.

**Procedure**

1. Tap **Info** ⓘ next to a call entry.

   On Poly Trio 8300 systems, press the **Select** button with the call entry highlighted.
2. Select **Delete Call** ✕.

# Local Directory

You can add and save contacts in the system's Local Directory, if allowed access by your system administrator.

Your system administrator can set the Local Directory as read-only or require a password for access to the directory. Contact your system administrator for assistance accessing or updating the Local Directory.

**Related Links**

Add Corporate Directory Contacts to the Local Directory on page 62

## Search for a Local Directory Contact

In the Local Directory, you can enter a search criteria to find your desired contact.

**Procedure**

1. Navigate to **Contacts** > **Local Directory**.
2. In the Search field, enter your contact’s name.

   Results matching your search display automatically.

## Add a Contact to the Local Directory

When you add a contact to your Local Directory, you can choose how much information you want to enter for your contact. You are required to only enter a contact number for each new contact.

**Procedure**

1. In the Local Directory, select **Add** + .
2. From the **Add Contact** screen, enter your contact's information in the available fields.
3. Select **Save**.

## View Contact Details

From your Local Directory, you can view information for any contacts saved to the directory.

**Procedure**

1. Navigate to **Contacts** > **Local Directory**.
2. In the Local Directory, select a contact.

   The Details screen is displayed with the contact’s name, number, and any additional information, such as a job title or email address.

## Update a Local Directory Contact's Information

After you add a contact to your Local Directory, you can update the contact’s information.

**Procedure**

1. From the Local Directory, select a contact.
2. On the Details screen, select **Edit** .
3. On the Edit Contact screen, update the contact's information.
4. Select **Save**.

## Delete a Local Directory Contact

You can delete any contact from the Local Directory.

**Procedure**

1. From the Local Directory, select a contact.
2. On the Details screen, select **Delete Contact**.
3. Select **Yes** to delete the contact.

# Local Directory Favorites

Favorites are the contacts in your Local Directory that you will call most often.

Contacts that you add as favorites display on the Home screen. Only three favorites display onscreen at a time, however, you can swipe the screen from right to left to display additional favorites. Favorites also display at the top of the list of contacts in the Local Directory.

## Add Favorites

You can add any contact in the local directory as a favorite.

When you add a contact as a favorite, the contact displays on the Home screen.

**Procedure**

1. Navigate to **Contacts** > **Local Directory**.
2. Select a contact.
3. On the Details screen, select **Favorite** ★.

## Remove a Favorite

You can remove a favorite contact to make room for a new favorite.

When you remove a contact from your favorites, the contact is removed from the Home screen.

**Procedure**

1. Navigate to **Contacts** > **Local Directory**.
2. Select a contact.
3. On the Details screen, select **Favorite** ★.

# Corporate Directory

Your system administrator can set up your phone so that you can access a Corporate Directory, which lists contacts and groups within your company.

However, you cannot update the Corporate Directory, and your system administrator determines which contacts you can see. Check with your system administrator to find out if this feature is available.

---

**Note:** You may need to enter your user credentials to access the directory for the first time, if set by your system administrator.

---

## Search the Corporate Directory

You can search for contacts in the Corporate Directory using either their first name or last name.

**Procedure**

1. Navigate to **Contacts** > **Corporate Directory**.
2. In the search field, enter your search criteria and select **Submit**.
3. Select a contact and select **View** to view the contact's information.

## Perform an Advanced Search of the Corporate Directory

An advanced search enables you to choose to search for contacts by first name, last name, or phone number.

Optionally, use a prerequisite.

**Procedure**

1. Navigate to **Contacts** > **Corporate Directory**.

2. In the **Corporate Directory**, select **AdvFind**.
3. In the search field, enter your search criteria and select **Submit**.
4. Select a contact and select **View** to view the contact's information.

## Add Corporate Directory Contacts to the Local Directory

You can add contacts in the Corporate Directory to the Local Directory.

When you save a Corporate Directory contact to the Local Directory, the first name, last name, and phone number of the contact are automatically saved to the directory. You can add additional contact information after the contact is saved to the directory.

**Procedure**

1. In the **Corporate Directory**, search for a contact.
2. From the search results, select the contact and select **View**.
3. Select **Save**.
4. Enter any additional contact information and select **Save**.

**Related Links**

Local Directory on page 59

# Searching the BroadSoft Directory

You can access and search the BroadSoft Directory on the phone, and you can choose to perform a simple or advanced search for contacts.

After the system administrator configures the Enterprise directory, you can view a list of contacts by default in the BroadSoft directory. The default contacts list is displayed even when no text is entered in the search box of the directory.

## Perform a Simple Search of the BroadSoft Directory

A simple search enables you to search for contacts using either their first name, last name, or by typing a few letters of their name. A maximum of 50 contacts are available for viewing at one time.

**Procedure**

1. Navigate to **Contacts** > **BroadSoft Directory**.

   A default list of contacts is displayed.
2. In the search field, enter your search criteria and select **Submit**.

## Perform an Advanced Search of the BroadSoft Directory

An advanced search enables you to choose to search for contacts by first name, last name, or phone number.

**Procedure**

1. Navigate to **Contacts** > **BroadSoft Directory**.

   A default list of contacts is displayed.
2. Select **Advanced Search** in the BroadSoft Directory.
3. On the **Advanced Search** screen, choose to search for a contact by first name, last name, or a contact number.

4. Optional: Do one of the following:
   - Select **Cs.Sn** to make the search case-sensitive.
   - Select **Cs.In** to make the search case-insensitive.
5. In the search field, enter your search criteria and select **Submit**.
6. Choose your contact.

   A contact details screen is displayed.

## Add BroadSoft Contacts to the Local Directory

After you find your BroadSoft contact, you can add the contact to the Local Directory.

The first and last name and phone number of the contact are saved to the Contact Directory. You can go to the Contact Directory to see if the contact was saved correctly and to add additional contact information.

**Procedure**

» In the contact details screen, select **Add to local directory**.

# Voicemail and Pages

**Topics:**


- Access Voicemail Messages
- Receiving Messages with Group Paging


You can send, broadcast, and access a variety of audio messages on the phone.

**Note:** Your phone may not support all of the features described in this section. Check with your system administrator to find out which features are available.

## Access Voicemail Messages

When there are voicemail messages available on the phone, an audible tone plays and an alert displays on the Messages icon.

**Note:** For information on setting or changing the voicemail greeting or on remotely accessing your voicemail from the phone, contact your system administrator or service provider.

**Procedure**

1. Navigate to **Settings** > **Features** > **Voicemail** > **Message Center**.
2. Select a line.
3. Select **Connect** and follow the voicemail prompts.

## Receiving Messages with Group Paging

You can receive pages from any paging groups you are subscribed to. By default, you are subscribed to groups 1, 24, which is designated for Priority pages, and 25, which is designated for Emergency pages.

How you receive a page depends on the priority of the page, whether you are in an active call, and whether the phone is set to receive a page during an active call. When you receive a page, the page is always played through the speakerphone.

Your system administrator can define up to 25 paging groups and assign a label to each group to identify the phones in the group, such as All, HR Dept, Shipping Staff, or Executives.

Each group has one of the following priorities:

- Normal—By default, broadcasts sent to groups 1 to 23 are considered Normal broadcasts. By default, all phones are configured to receive broadcasts sent to group 1.
- Priority—By default, broadcasts sent to group 24 are considered Priority broadcasts. A Priority broadcast interrupts Normal broadcasts or active calls. All phones receive Priority broadcasts unless Do Not Disturb is enabled.
- Emergency—By default, broadcasts sent to group 25 are considered Emergency broadcasts. An Emergency broadcast interrupts Normal broadcasts, Priority broadcasts, and active calls and plays out at near maximum volume even if Do Not Disturb is enabled.

When you enable Do Not Disturb, you receive only Emergency broadcasts, and non-emergency broadcasts do not play or display.

## Listen to a Page during an Active Call

How you handle a page when you are in an active call depends on the page priority and whether the phone is set up to receive a page during active calls.

The following occurs when you receive a page during a call:

- For Normal pages, the page immediately plays, and you hear audio from both the active call and the page.
- For Priority or Emergency page, the page immediately plays. You hear audio from the active call and the page.
- If the phone is not set up to receive Normal pages during active calls, the page is displayed as Pending.

---

**Note:** You adjust the volume of a Normal, non-emergency page while it plays, and the phone uses the adjusted volume for all subsequent non-emergency pages. However, only your system administrator can change the volume of an Emergency page.

---

**Procedure**

» Do one of the following:
  - For pages that play automatically during a call, hold the call to hear only the page.
  - For Pending pages, select **Accept** or hold the call.

## Receiving Pages When You're Not in an Active Call

When you receive a page and you are not in an active call, the page immediately plays, regardless of the paging priority.

While a page plays, you can:

- Hold the page.
- End the page. This ends the page at your phone only.
- Place a new call.

# Connecting Bluetooth and USB Devices

**Topics:**


- Connecting Devices using Bluetooth
- Connecting a Device using a USB Cable


You can connect a USB or Bluetooth-enabled laptop or mobile device to a Poly Trio system. You can also connect Bluetooth-enabled devices to Poly Trio 8800 systems using Near Field Communication (NFC) .

When you connect a device to the phone, you can use it as your microphone for audio and video calls and as a speaker for calls, music players, and videos.

## Connecting Devices using Bluetooth

The Bluetooth feature on Poly Trio systems enables you to place calls on your mobile phone and use the system as a speakerphone for the call. You can also use the system to play audio from media, such as music or videos, from your mobile phone or tablet.

**Note:** The Poly Trio system does not automatically reconnect to previously paired Bluetooth devices after the device is disconnected from the system or after a system reboot. You must manually reconnect and pair the Bluetooth device with the Poly Trio system.

**Related Links**

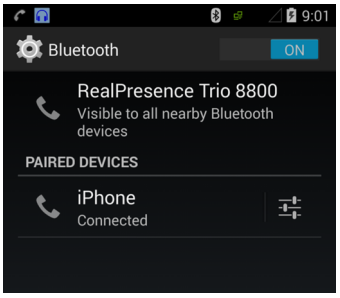

Place a Call over Bluetooth on page 25


### Make the System Visible to Nearby Bluetooth Devices

Before you connect a Bluetooth device to a Poly Trio system or NFC device to a Poly Trio 8800 system, make sure the system is visible to nearby devices.

**Procedure**

1. On the Home screen, select **Bluetooth**.
2. Make sure the statement **Visible to all nearby Bluetooth device** is displayed below the system's name, as shown next.




3. If the statement **Only visible to paired devices** is displayed, select the system's name.

   The system is now visible to all nearby Bluetooth devices.

## Connect a Bluetooth Device

You can connect a Bluetooth-capable mobile phone or tablet to a Poly Trio system, if your system administrator has enabled Bluetooth on the system.

The system can remember up to 10 previously paired devices. You cannot connect to a Bluetooth device when you are in a call.

**Procedure**

» On your device, turn on Bluetooth and select the name of the system in available devices.

## Connect a Bluetooth Device Using Near Field Communication

You can connect a Poly Trio 8800 system to a Bluetooth-capable mobile phone or tablet using Near Field Communication (NFC).

Connecting the mobile phone or tablet to the Poly Trio 8800 system with Bluetooth using NFC enables you to play the audio from calls or media, such as music or videos, on the system.

---

**Note:** The Poly Trio 8300 system and Poly Trio 8500 system do not support pairing with Bluetooth devices using NFC.

---

**Procedure**

1. Enable NFC on your device.
2. Tap and hold your device for two seconds above the NFC symbol on the left side of the phone.
3. Confirm that your device is paired and connected to the phone.

## Play Audio from a Bluetooth Device

You can use a Poly Trio as a Bluetooth speaker for music or videos played on your mobile phone or tablet.

**Procedure**

1. Connect your mobile phone or tablet with the system.
2. On your mobile phone or tablet, choose the music or video you want to hear.
3. Make sure that the Poly Trio is set as your audio device.

   The audio plays through the phone's speakers.

# Connecting a Device using a USB Cable

You can connect your computer, mobile phone, or tablet directly to the phone using a USB cable that connects to the micro USB port on the phone. When you connect your device to the phone, you can use it as a microphone for calls and as a speaker for audio calls or media played on your device.

When you connect a Microsoft® Windows® computer to the system, you can control the volume of audio and video calls from the computer or on the phone. While connected, the call volume is synchronized on both devices.

**Related Links**

Poly Trio System Hardware Overview on page 11

## Minimum Hardware and Software Laptop Requirements

Before you connect your laptop to the phone, make sure your laptop meets the minimum hardware and software requirements.

**Minimum Hardware and Software Requirements for the Connected Laptop**

| Category | Requirement |
|---|---|
| Operating System | • Windows 8.1 (32-bit or 64-bit)<br>• Windows 8 (32-bit or 64-bit)<br>• Windows 7 (32-bit or 64-bit)<br>• OS X 10.9.x (Maverick)<br>• OS X 10.10.x (Yosemite)<br>• OS X 10.11.x (El Capitan)<br>• OS X 10.12.x (Sierra) |
| Desktop client or application | • Polycom RealPresence Desktop<br>• Skype for Business |

## Connect a USB Device or Laptop

When you connect your Poly phone to a laptop or mobile device, you can use the phone as a microphone and speaker for audio and video calls, including Skype for Business calls, and to play media including music and videos.

**Procedure**

» Connect a USB cable from your computer or device to the micro USB port on the phone.

## Setting Your Phone as the Audio Device

In order to use your phone to play audio from calls or media on your connected laptop, you need to set the phone as your audio communication device.

The following sections provide information on setting the phone as your audio device for your laptop and communication and collaboration clients such as RealPresence Desktop or the Skype for Business client.

### Setting the System as Your Audio Device for Communication Clients

When your laptop is connected to the phone, you can set the phone as your microphone and speakers for communication and collaboration clients, like RealPresence Desktop, BroadSoft BroadTouch Communicator, or Skype for Business.

Depending on the capabilities of the client, you can use the phone to accept, hold and resume, and end calls placed and received in the client. Note that the status of the calls may differ between the client and the system depending on the capabilities of the client.

## Set the System as Your Audio Device in RealPresence Desktop

After you connect your laptop to the phone, you can set the phone as your audio device input and output device in the RealPresence Desktop application to play audio from the meeting using the phone's speakers and use the phone as your microphone.

If you do not have the RealPresence Desktop application, download the application from the RealPresence Desktop Support page.

**Procedure**

1. In RealPresence Desktop, click **Settings** and click **Audio Device**.
2. For **Audio input device (microphone)**, select the phone you want to use from the drop-down list.
3. For **Audio output device (speakers)**, select the phone you want to use from the drop-down list.
4. Click **OK**.

## Set the System as Your Audio Device for Skype for Business

When your laptop is connected to the phone, you can set the system as your microphone and speakers for Skype for Business calls you place on your laptop.

**Procedure**

1. In the Skype for Business client, click **Settings** and click **Tools** > **Audio Device Settings**.
2. From the drop-down list, select the phone you want to use for audio calls.

## Set the System as the Default Device for Your Laptop

When your laptop is connected to the phone, you can set it as the default device for your laptop and play audio from music and videos using the phone's speakers.

**Procedure**

1. On your laptop, click **Start** > **Control Panel**.
2. In the **Control Panel**, click **Hardware and Sound** > **Sound**.
3. Select the phone you want to use and click **Set as Default Device**.
4. Click **OK**.

   Any audio from music or videos plays on the phone.

# Poly Trio Settings

**Topics:**


- Password Required to Access Basic Settings
- Time and Date Display
- Set the Language
- Backlight Intensity and Timeout
- Format Numbers
- Power-Saving Mode
- Control Where Audio Plays
- Set a Ringtone for Incoming Calls


You can make some basic customizations on the phone, which includes changing the time and date format, setting a language, and adjusting the screen brightness.

## Password Required to Access Basic Settings

Many of the features available on Poly Trio can be enabled or customized from the Basic settings menu. However, if your system administrator has set up the phone to require a password to access the Basic settings menu, you cannot change settings without the permission of your system administrator. Contact your system administrator for assistance enabling or customizing features.

## Time and Date Display

The time and date display in the status bar on Poly Trio. When the phone cannot obtain a time and date, the time and date display flashes. If this happens, or if the time and date are incorrect, contact your system administrator.

**Related Links**

Set the Time and Date Format

### Change the Time and Date Format

You can customize the time and date by choosing between a variety of time and date formats, including options to display the day, month, or year.

**Procedure**

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Time & Date** and select one of the following:
   - Select **Clock Date** to change the date format.
   - Select **Clock Time** to change the time format.
   - Select **Clock Order** to change the order of the time and date display.
3. From the **Clock Date**, **Clock Time**, or **Clock Order** screen, select the format you want.

## Disable the Time and Date Display

You can turn off the time and date display so that they do not display at all.

**Procedure**

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Time & Date** and select **Disable**.

# Set the Language

Poly phones support several languages that you can choose to display on the phone.

Check with your system administrator to find out exactly which languages are supported on your phone.

**Procedure**

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Language** and select a language.

   The language on the phone updates immediately.

# Backlight Intensity and Timeout

You can change settings for the following backlight components:

- Backlight Intensity—The brightness of the screen during phone activity and inactivity.
- Backlight Timeout—The number of seconds the phone is inactive before the backlight dims to its Backlight Idle intensity. The backlight timeout period begins after your last activity, such as an incoming call.

Backlight Intensity includes the following settings you can choose from:

- Backlight On—The brightness of the screen when there is activity.
- Backlight Idle—The brightness of the screen when there is no activity.
- Maximum Intensity—The brightness scale that applies to both Backlight On and Backlight Idle intensities.

**Related Links**

Features for Vision-Impaired and Blind Users on page 79

## Set the Backlight Intensity

You can change the Backlight On intensity and the Backlight Idle intensity separately. You can also choose a high, medium, or low intensity, or turn off the backlight entirely. When you change the Maximum Intensity, you modify the entire backlight intensity scale. For example, if you decrease the Maximum Intensity, the low, medium, and high levels for both Backlight On and Backlight Idle intensities decrease.

**Procedure**

1. Go to **Settings** > **Basic**.
2. Select **Backlight Intensity** > **Backlight On Intensity**.
3. Select the intensity you want, and select **Back**.
4. From the **Backlight Intensity** screen, select **Backlight Idle Intensity**.
5. Select the intensity you want, and select **Back**.

6. From the **Backlight Intensity** screen, select **Maximum Intensity**.
7. Select **Up** or **Down**, or drag your finger along the slider to increase or decrease the maximum intensity.

### Set the Backlight Timeout

The backlight automatically turns on with any phone activity. By setting the Backlight Timeout, you can determine how long the phone should be idle before the backlight dims to its Backlight Idle intensity. By default, the backlight dims after the phone is idle for 40 seconds.

**Procedure**

1. Go to **Settings** > **Basic**.
2. Select **Backlight Timeout**.
3. Select the number of seconds the phone is idle before the backlight dims.

## Format Numbers

By default, the phone automatically formats phone numbers based on the amount of numbers entered. For example, 17235439078 is reformatted as +1 (713) 543-9078.

**Procedure**

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Number Formatting**.
3. Select **Enable** or **Disable**.

## Power-Saving Mode

By default, Poly phones are set to enter power-saving mode and turn off the screen after being idle for a certain period of time to conserve energy.

You can determine the period of time that the phone is idle before the screen turns off, and you can set different idle timeouts for office hours and off hours, such as evenings and weekends. When power-saving mode is activated, the phone exits power-saving mode if an event occurs—for example, if there is an incoming call or message. If a screen saver is enabled, power-saving mode still occurs.

You can update the following power-saving settings:

- **Office Hours**—When you start work and how long you're in the office each day.
- **Timeouts**—The period of time the phone should be idle before the screen turns off.

---

**Note:** By default, Poly Trio systems enter power-saving mode after a period of idle time to conserve energy. However, Poly Trio systems do not enter power-saving mode while idle in the Bluetooth or Wi-Fi menus. To ensure the system enters power-saving mode, exit the Bluetooth or Wi-Fi menu using the Home or Back key.

---

## Change Your Office Hours for Power-Saving Mode

When you update your office hours, you specify when you start and how long you work each day. After your work hours, the phone is idle and goes into power-saving mode.

**Procedure**

1. Go to **Settings** > **Basic**.
2. Select **Power Saving** > **Office Hours** and select **Start Hour**.
3. Select a day of the week, and using the 24-hour clock, enter a start time from 0 to 23.
4. Select **Save**.
5. From the **Office Hours** screen, select **Duration**.
6. Select a day of the week and enter a duration of 0 to 12 hours per day.
7. Select **Save**.

## Change Idle Timeouts for Power-Saving Mode

You can update the period of time the phone is idle before the screen turns off.

You can specify different timeouts for office hours (Office Hours Idle Timeout) and non-office hours (Off Hours Idle Timeout). By default, the Office Hours Idle Timeout is much longer than the Off Hours Idle Timeout.

You can also specify a separate timeout period that applies after you press a key or tap the screen (on touchscreen models). This is called the User Input Idle Timeout. You can choose to set a higher User Input Idle Timeout than the Office Hours and Off Hours Idle Timeouts so that when you're actively using the phone, power-saving mode doesn't initiate as often.

---

**Tip:** If you press a key or tap the screen (on touchscreen models), the idle timeout period that applies (User Input Idle Timeout or Office Hours/Off Hours Idle Timeout) is the timeout with the highest value.

---

**Procedure**

1. Go to **Settings** > **Basic**.
2. Select **Power Saving** > **Timeouts**.
3. Select **Office Hours Idle Timeout** and enter the number of minutes (1 to 600 minutes) the phone should wait during office hours before starting power-saving mode.
4. Select **Off Hours Idle Timeout** and enter the number of minutes (1 to 10 minutes) the phone should wait during off-hours before starting power-saving mode.
5. Select **User Input Idle Timeout** and enter the number of minutes (1 to 10 minutes) the phone should wait after a key press or screen select before starting power-saving mode.
6. Select **Save**.

# Control Where Audio Plays

When your Poly Trio system is paired with a Poly Trio Visual+, Trio VisualPro or RealPresence Group Series system, you can have audio play from the Poly Trio system speakers or from the paired device's monitor(s) or external speakers.

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**Note:** If you have a Polycom® EagleEye™ Acoustic camera connected to your paired Trio VisualPro or RealPresence Group Series system, Poly recommends using your Poly Trio system for audio.

---

**Procedure**

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Audio Output** and choose one of the following options:
   - **Phone speakers**: Audio plays on the system only.
   - **TV speakers**: Audio plays on the paired device's connected monitor(s) or external speakers.
   - **Automatic - based on call type**: The system automatically chooses where to play audio based on the call type. The Poly Trio system is used for audio calls, while the paired device is used for video calls.

   You can toggle this setting while in a call.

# Set a Ringtone for Incoming Calls

A simple way to personalize your phone is to change the ringtone. You can pick unique ringtones for the different lines on the phone. The default ringtone is Low Trill.

**Procedure**

1. Go to **Settings** > **Basic** > **Preferences**.
2. Select **Ring Type**.
3. From the **Ring Type** screen, select a ringtone.
4. Select **Play** to hear the ringtone.

**Related Links**

Features for Hearing-Impaired Users on page 78

# Maintaining Poly Trio

**Topics:**


- Investigate Warnings
- Restart Your Phone
- Update the Phone's Configuration
- Test the Hardware
- Clean the Touchscreen


When the phone is not operating properly, you can investigate or troubleshoot issues along with any other tasks your administrator may ask you to perform.

## Investigate Warnings

When a phone is unable to perform certain tasks, a Warning icon ⚠ displays in the status bar and on the Settings icon on the Home screen.

The warning icon lets you know that your phone has one or more important issues. You can view details about the issues from the Warnings screen.

**Procedure**

1. Go to **Settings** > **Status** > **Diagnostics**.
2. Select **Warnings**.

   The **Warnings** screen is displayed listing any issues.

## Restart Your Phone

Your system administrator may ask you to restart the phone if it malfunctions or to assist in troubleshooting.

---

**Caution:** Before you restart the phone, contact your system administrator. If the phone is malfunctioning, you may be able to restore normal operation without restarting it. Additionally, your system administrator may want to troubleshoot the phone before you restart it. You do not need to restart the phone to update its configuration.

---

**Procedure**

1. Go to **Settings** > **Basic**.
2. Select **Restart Phone**.

   A confirmation message is displayed.
3. Select **Yes**.

   The restart process begins, and the process ends when the Home screen is displayed.

**Related Links**

Update the Phone's Configuration on page 76

# Update the Phone's Configuration

Your system administrator may ask you to update the configuration for your phone to apply any changes to system settings, which you can do without restarting it.

**Procedure**

1. Go to **Settings** > **Basic**.
2. Select **Update Configuration**.

   A confirmation message is displayed.
3. Select **Yes**.

   The configuration is updated. The phone may restart, depending on which settings have changed.

**Related Links**

Restart Your Phone on page 75

# Test the Hardware

If your phone is having any issues, your system administrator may ask you to access a diagnostics menu on the phone to test its hardware.

You can test the display, microphones, and speaker. Contact your system administrator for instructions on how to perform these tests.

**Procedure**

1. Go to **Settings** > **Status** > **Diagnostics**.
2. Select **Test Hardware** and select one of the following:
   - **Audio Diagnostics**
   - **Display Diagnostics**
   - **Touch Screen Diagnostics**

# Clean the Touchscreen

The phone screens require minor maintenance, but you may need to clean the screen periodically.

Use a clean, dry, microfiber cloth—the kind you would use to clean glass surfaces—to wipe the screen. Do not use chemicals to clean the screen.

Before you clean the screen, you need to disable it so you don't activate phone functions while you wipe the touchscreen.

**Procedure**

1. Go to **Settings** > **Basic**.
2. Select **Screen Clean**.
3. Wipe the screen with a clean, dry, microfiber cloth.
4. Press any key on the phone dial pad to enable the touchscreen again.

**Note:** If the screen is still dirty after cleaning, dampen a soft, lint-free cloth with an isopropyl alcohol and water solution of 50:50, then wipe the screen with the cloth. Always use the dampened cloth to apply the solution; never apply the solution directly to the screen because the solution could seep inside the screen or stain the system. Do not use chemicals to clean the screen.

# Accessibility Features

**Topics:**


- Features for Hearing-Impaired Users
- Features for Mobility-Impaired Users
- Features for Vision-Impaired and Blind Users


Poly products include a number of features to accommodate hearing-, vision-, mobility-, or cognitively-impaired users.

## Features for Hearing-Impaired Users

Poly phones include many features that enable users with hearing impairments to use various features on the phone.

The following table lists the accessibility features for hearing-impaired users.

**Accessibility Features for Hearing-Impaired Users**

| Accessibility Feature | Description |
|---|---|
| Visual message indicators | Icons on the screen indicate when the system has new messages. |
| Adjustable ring tone and volume | You can choose from a variety of ring tones for the phone. You can also change the volume of the ringer to suit your needs and choose different ring tones for contacts. |
| Adjustable call volume | While in a call, you can raise or lower the volume of the device. |
| Visual notifications | Status and icon indicators let you know when you have incoming, outgoing, active, or held calls. Indicators also alert you of the device's status and when features are enabled. |
| Headset memory mode | If you use a headset, you can set up your phone to use your headset for all calls. |
| TTY support | The phones supports commercial TTY devices such as Ultratec Superprint. Additionally, the phones provide acoustic coupled TTY support. |

**Related Links**

Set a Ringtone for Incoming Calls on page 74

# Features for Mobility-Impaired Users

Poly phones include features that enable users with mobility impairments to perform various functions on the phone.

The following table lists the accessibility features for mobility-impaired users.

**Accessibility Features for Mobility-Impaired Users**

| Accessibility Feature | Description |
|---|---|
| Auto-answering | You can enable the system to auto-answer calls. |
| Touchscreen | The large touchscreen enables you to select, swipe, and press the screen to perform functions and activate features. |
| Built-in speakerphone | A built-in speakerphone allows you to hear audio on the device without having to use headset. |

**Related Links**

Answer Calls Automatically on page 29

**Related Links**

Poly Trio System Hardware Overview on page 11

# Features for Vision-Impaired and Blind Users

Poly phones include various features that enable users with visual impairments to use many of the features on the phone.

The following table lists the accessibility features for visually-impaired and blind users.

**Accessibility Features for Vision-Impaired and Blind Users**

| Accessibility Feature | Description |
|---|---|
| Adjustable backlight settings | You can change the brightness of the screen by adjusting backlight intensity settings. |
| Auto-answering | You can enable the system to auto-answer calls. |
| Plastic overlay | A plastic overlay is available for placement on the touchscreen for the volume keys to assist with adjusting the volume. |
| Illuminated feature keys | Many feature keys illuminate when activated to alert you when a feature is enabled. |

| Accessibility Feature | Description |
| --- | --- |
| Microphone mute | An audible alert plays when you mute or unmute the microphones using any of the Mute keys on the device or far-end system. The system plays an alert periodically if the device is muted for a set period of time. |

**Related Links**

Backlight Intensity and Timeout on page 71

**Related Links**

Answer Calls Automatically on page 29

# Troubleshooting

**Topics:**


- Check the Status of Paired Device
- Check the Status of the Calendar
- Tips for Resolving Content Sharing Issues
- Tips for Resolving Camera Issues
- Set Log Levels
- Reset the Phone to Factory Defaults


If you are having issues with your Poly phone, you can try the troubleshooting options and solutions in the following topics to resolve certain issues.

## Check the Status of Paired Device

If yours or the far-end's video stream or content is not displaying on the monitor, check that the Poly Trio Visual+, Trio VisualPro, or RealPresence Group Series system is on and paired with your Poly Trio system.

**Procedure**

1. On the system, navigate to **Settings** > **Status** > **Networked Devices**.
2. Make sure that the paired device is **Connected**.

   If the paired device is not connected, contact your system administrator.

**Related Links**

Tips for Resolving Camera Issues on page 82

## Check the Status of the Calendar

When you do not see the Calendar icon on the Home screen, or if you are not receiving meeting reminders, it is possible that the phone is not connected to the Microsoft Exchange Server.

**Procedure**

1. Navigate to **Settings** > **Status** > **Calendar**.
2. On the Calendar screen, make sure the **Status** field includes **Connected to Server**.

   If the status reads that it is not connected to the server, contact your administrator.

## Tips for Resolving Content Sharing Issues

If your content is not showing when sharing content on a Poly Trio system, try one of the following solutions:

- Make sure your device is on the same network as the room system.

- Contact your system administrator for additional help.

# Tips for Resolving Camera Issues

If the camera is not working during a video call, try one of the following solutions:

- Check that the Poly Trio Visual+, Trio VisualPro, or RealPresence Group Series system is paired with the Poly Trio system.
- Reconnect the camera to the paired device.
- If paired with a Poly Trio Visual+, make sure the camera is supported:
  - Polycom® EagleEye™ Mini USB camera
  - Polycom® EagleEye™ IV USB camera
  - Logitech C930e webcam
- If paired with a Trio VisualPro or RealPresence Group Series system, make sure the camera is supported:
  - Polycom® EagleEye™ IV camera
  - Polycom® EagleEye™ Director II camera
  - Polycom® EagleEye™ Producer camera
  - Polycom® EagleEye™ Acoustic camera
- Contact your system administrator for additional help.

**Related Links**

Check the Status of Paired Device on page 81

# Set Log Levels

Your system administrator uses log files to understand any issues with your phone and may ask you to set the level for log files to reduce the amount of logs produced.

Contact your system administrator before setting a log level for your phone.

**Procedure**

1. Navigate to **Settings** > **Basic** > **Diagnostic Logs** > **Server Log Level**.
2. Choose a log level.

# Reset the Phone to Factory Defaults

You can access the phone reset option without having to enter an administrator password.

After the administrator configures this feature on the phone, you can reset the phone to factory default settings.

**Procedure**

» Navigate to **Settings** > **Basic** > **Reset to Factory**.